



**COUNTY OF HENRICO  
DEPARTMENT OF FINANCE  
PURCHASING DIVISION  
CONTRACT EXTRACT  
NOTICE OF AWARD/RENEWAL**

DATE:	July 15, 2024
CONTRACT COMMODITY/SERVICE: <i>(include contracting entity if cooperative)</i>	Employee Assistance Program
CONTRACT NUMBER:	2515A
COMMODITY CODE:	952.38
CONTRACT PERIOD:	August 1, 2024 through July 31, 2025
RENEWAL OPTIONS:	3 Additional one-year period through 2028
USER DEPARTMENT:	County/Schools
Contact Name:	Bridget Cease, Yvette George; Nancy Jones Oltjenbruns, Francine Bouldin
Phone Number:	804-501-4783, 804-501-7202; 804-652-3672
Email Address:	cea01@henrico.gov, GEO029@henrico.gov, nejoltjenbru@henrico.k12.va.us, fgbouldin@henrico.k12.va.us
HENRICO COOPERATIVE TERMS INCLUDED:	YES
SUPPLIER: Name:	Anthem Health Plans of Virginia, Inc. Health Keepers, Inc.
Address:	2015 Staples Mill Road
City, State:	Richmond, VA 23230
Contact Name:	Karmen Spooner; Jeff Hartman
Phone Number:	804-297-1351; 804-354-7854, 804-387-2401 (cell)
Email address:	Karmen.spooner@anthem.com Jeff.hartman@anthem.com
ORACLE SUPPLIER NUMBER:	1547
BUSINESS CATEGORY:	Non-SWaM
PAYMENT TERMS:	Net 45
DELIVERY:	Per Contract
FOB:	Destination
BUYER: Name:	Leisel O. Collins, CPPB,VCO, VCA
Title:	Procurement Manager
Phone:	804-501-5687
Email:	COL119@henrico.gov

## ATTACHMENT H

### PRICING/COST PROPOSAL

**Option 1:** Cost for services as needed and requested which will consist of up to 6 EAP sessions per employee/household member per presented issue per year.

- a. Cost per EAP session \$ N/A
- b. Cost per hour for employee training classes to be taught on-site \$ N/A / hr. (8-hour class)  
\$ N/A / hr. (4-hour class)
- c. Cost of marketing materials (i.e. flyers). List quantities and pricing:

Description of Marketing Materials	Quantity per Unit of Measurement	Unit of Measurement	Price per Unit of Measurement
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A

**Option 2:** A per employee, per month cost to include household members and up to 6 EAP sessions per employee/household member per presented issue per year.

- a. \$1.82 Rate is per employee, per month for 2023-24. We agree to each renewal's increase not to exceed 3% above the previous year's fee.
- b. Cost per EAP session \$ N/A
- c. Cost per hour for employee training classes to be taught on-site \$ N/A / hr. (8-hour class)  
\$ N/A / hr. (4-hour class)

Our proposal includes an annual bank of 200 hours that may be used for trainings and critical incidents. After the bank is exhausted additional trainings are \$250 per hour per presenter. Additional critical incidents are \$300 per hour.

Fitness for Duty (FFD) and Substance Abuse Professional evaluations are not included with our proposal. Our best practice is to connect requests for DOT/SAP or Fitness for Duty (FFD) assessments directly to a vendor who provides these specialized services. This will ensure that the employee engages in care as quickly as possible, and the referring manager receives all required documentation in a timely manner. We most frequently collaborate with American Substance Abuse Professionals for DOT/SAP needs; for FFD we collaborate with R3 Continuum. However, if you have a preferred partner, we would be glad to direct requests for services to that organization. Employees who return to work after meeting treatment requirements are often referred to the EAP as a management referral. This helps to ensure they have the tools and resources they need to maintain the gains they have made.

- d. Cost of marketing materials (i.e. flyers). List quantities and pricing:

Description of Marketing Materials	Quantity per Unit of Measurement	Unit of Measurement	Price per Unit of Measurement
Our proposal includes our standard suite of promotional materials including a poster for			\$

the workplace, brochures, and a selection of fliers. Projects such as customizing materials, home mailings, or other non-standard requests may result in an additional fee. All custom projects will be discussed in detail with County of Henrico prior to development.			
			\$
			\$
			\$
			\$

If the County decides to use option 2, provide detailed information on how billing would be structured. (i.e. Number of employees at the beginning of the month. Average number of employees over a six-month period)

Anthem response: County of Henrico is welcome to adjust the monthly payment based on the number of employees at that time. We welcome dialogue on this topic.

Other optional services offered:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

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**From:** Rutledge, Elizabeth K. <elizabeth.rutledge@anthem.com>  
**Sent:** Tuesday, May 30, 2023 8:01 PM  
**To:** Collins, Leisel  
**Cc:** Hartman, Jeff W.  
**Subject:** RE: RFP23-2515-4LOC BAFO Letter - Anthem  
**Attachments:** Revised Attachment H\_Anthem EAP.docx; revised County of Henrico (VA) EAP Proposal\_Anthem Attachment D.docx

Good evening Leisel,

Thank you again for the opportunity to present our best and final offering to you all.

In response to question 1 & 2 as listed in the letter, please see below:

County of Henrico may access CIR services by calling the 24/7 EAP line. Our EAP operates 24/7 to ensure consistent, around-the-clock live answer. Members and client representatives never hear a busy signal or need to leave a message. A licensed clinician is always available to address escalated needs.

Crisis management is an essential component of our EAP. On average we respond to more than 1,000 events a year, totaling more than 4,500 hours of on-site support by counselors that are licensed professionals, certified and experienced in providing critical incident response services.

We regularly provide counselors on-site who assist employees and management in response to:

- Mergers, company closings, or layoffs
- Accidents
- Death of a key employee, including following a prolonged illness
- Natural disasters that affect the entire community as well as the employer
- Robberies or other criminal activities
- Incidents of workplace violence, such as a shooting

Our CIR services provide a range of tools to help with the acute stress that often accompanies crises; services include:

- Phone consultations with individual managers
- Educational materials and website resources for your Human Resources departments to distribute among employees
- Onsite intervention and assistance from specially trained crisis counselors and professional facilitators

When a traumatic event occurs at the worksite or to an employee, your representative will call the EAP and describe the incident to one of our clinical experts. Before sending counselors on site, our team, including the EAP client consultant, will consult with your representatives to:

- Determine the most clinically appropriate response
- Establish expectations
- Determine the time, date, and location of services

- Review the service announcement content
- The consultation is also an opportunity for our trained clinicians to help your representatives process the impact the situation may be having on them.

Once onsite, our counselors meet with management before services begin and then again after services conclude to review and make recommendations. We also follow up with a satisfaction survey, which helps us to understand the effective of our critical incident services. In critical incident satisfaction rate was 94%.

We look forward to discussing this important topic with you in more detail during the implementation process.

To confirm CIR training bank of hours. We would provide 100 hours to the County and 100 hours to the Schools for a total of 200 hours at no impact to our final price of \$1.82 PEPM.

Per the instructions in Question 4 & 5, I've included the revised Attachment D & H.

Our best and final pricing includes the 200 hours of CIR/Trainings at the original rate of \$1.82 PEPM.

Please let us know if anything additional is needed. I wasn't sure if I made the appropriate edit for Attachment D, so please let me know if I need to resubmit.

Thank you and we look forward to hearing from you all!  
Elizabeth



**Elizabeth Rutledge**

Client Executive Behavioral Health and EAP Solutions  
Anthem Blue Cross and Blue Shield  
M: 804-971-2705  
[elizabeth.rutledge@anthem.com](mailto:elizabeth.rutledge@anthem.com)

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**From:** Collins, Leisel <col119@henrico.us>  
**Sent:** Thursday, May 25, 2023 2:43 PM  
**To:** Rutledge, Elizabeth K. <elizabeth.rutledge@anthem.com>  
**Cc:** Hartman, Jeff W. <Jeff.Hartman@Anthem.com>  
**Subject:** {EXTERNAL} RFP23-2515-4LOC BAFO Letter - Anthem

This email originated outside the company. Do not click links or attachments unless you recognize the sender.

Good Afternoon Elizabeth,

We appreciate you taking the time to present to our team and forwarding the presentation documents. Attached please find a document for your review and feedback.

Thank you,

**Leisel O. Collins, CPPB, VCO, VCA**  
Assistant Division Director  
Department of Finance, Purchasing  
804-501-5687



**CONFIDENTIALITY NOTICE:** This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information or may otherwise be protected by law. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply e-mail and destroy all copies of the original message and any attachment thereto.

## ATTACHMENT D

### PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION

NAME OF OFFEROR: Anthem EAP

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Va. Code § 2.2-4342(F) in writing, either before or at the time the data or other materials are submitted. The Offeror must specifically identify the data or materials to be protected including the section(s) of the proposal in which it is contained and the pages numbers, and state the reasons why protection is necessary. A summary of trade secrets and proprietary information submitted shall be submitted on this form. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying an entire proposal, any portion of a proposal that does not contain trade secrets or proprietary information, line item prices, or total proposal prices as proprietary or trade secrets. If, after being given reasonable time, the Offeror refuses to withdraw such classification(s), the proposal will be rejected.

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE
Scope of Services, Section B, Question 10: Fitness for Duty Examination	15	
Scope of Services, Section B, Question 12: Billing	20	
Experience and Qualifications, Question b, i: Current Organizational Structure and ii: Retention Rate of Current Staff	21	
Experience and Qualifications, Question b, iii: Associate Qualifications, Training and After-Hours Support	22	
Experience and Qualifications, Question b, iv: Assessments and Training	23-24	
Experience and Qualifications, Question b, v: Accreditation	24	
Experience and Qualifications, Question b, vi: Current Liability and Malpractice Coverage	24-25	

Experience and Qualifications, Question e: Subcontractors	26	
Implementation of Services/Project Management, Question a, iii: Bank of Hours, Anthem Integration and Guest Website Login	27-28	
Implementation of Services/Project Management, Questions a, xi and xii: Provider Network Statistics	31-32	
Implementation of Services/Project Management, Question a, xiv AND Question b: Subcontractors	32 & 33	
Implementation of Services/Project Management, Question g: Billing	36	
Exceptions: Scope of Services, Section B, Questions 11 and 12: Billing	40	
Assumptions: Billing and Contracting	41	

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_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____



COMMONWEALTH OF VIRGINIA  
**County of Henrico**

DEPARTMENT OF FINANCE  
Purchasing Division

May 25, 2023

Elizabeth Rutledge and Jeff W. Hartman  
Anthem Health Plans of Virginia and HealthKeepers, Inc.  
2015 Staples Mill Road  
Richmond, VA 23230  
[elizabeth.rutledge@anthem.com](mailto:elizabeth.rutledge@anthem.com) and [Jeff.hartman@anthem.com](mailto:Jeff.hartman@anthem.com)

RE: RFP #23-2515-4LOC – Employee Assistance Program

Dear Ms. Rutledge and Mr. Hartman:

This letter is to inform you that your firm has been selected to enter into negotiations for the referenced solicitation.

To begin this process, please submit your firm's response the following:

1. What is your protocol for critical incidents? Who would the County (General Government and Henrico County Public School (HCPS)) Point of Contact (POC) reach out to? How quickly can the County anticipate connecting with someone? Please confirm who would respond to the critical incident. What steps follow connecting with your service and someone responding? Scenario: A loaded gun was recovered in a school building and the school was in lock and hide for 3 hours. HCPS POC reached out to your firm and requests on-site critical incident support for the next morning.
2. Related to the above question, if the County POC feel a different level of response is necessary from what you recommend, how is that handled?
3. The County request proposed the bank of hours for critical incidents/training be allocated such that General Government and HCPS each receive their own, full amount of bank hours. Confirm how many bank hours will be provided to General Government and HCPS? How would this impact cost?
4. Your firm declared Pricing/Cost Proposal as Proprietary/Confidential. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying line item prices or total proposal prices as proprietary or trade secrets. Please return a revised Attachment D without listing Pricing/Cost Proposal.
5. Provide your "Best and Final" pricing for the project. If pricing remains the same, state that in your response.

***Remainder of page intentionally left blank. Signature page follows.***

Please provide the above items by 12:00 pm, Noon on Wednesday, May 31, 2023. A response via email attachment is sufficient.

If you have any questions, please contact me at 804-501-5687 or [COL119@henrico.us](mailto:COL119@henrico.us).

Sincerely,

A handwritten signature in cursive script, appearing to read "Leisel Collins".

Leisel Collins, CPPB, VCO, VCA  
Assistant Division Director



# County of Henrico, Virginia – Anthem EAP Proposal

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Exceptions ..... 40

Assumptions ..... 41

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## Introduction and Signed Forms

The following documents follow to establish our proposed Employee Assistance Program to complement Anthem's current medical/behavioral health plan coverage for the County of Henrico and its employees:

- Cover Letter
- Attachment A: Proposal Signature Sheet
- Attachment B: Business Classification Form
- Attachment C: Virginia State Corporation Commission Registration Information
- Attachment D: Proprietary/Confidential Information
- Attachment E: Insurance Specifications (Reference Only)
- Attachment F: Direct Contact with Students Certification
- Default Statement: Certification or explain that Anthem has not defaulted on or has had any government contract terminated in the last five years.

May 9, 2023

Leisel Collins, CPPB, VCO, VCA, Assistant Division Director, Dept. of Finance  
Lauren R. Taylor, MHRM, Human Resources Analyst, Benefits Division  
County of Henrico  
8600 Staples Mill Road  
Henrico, Virginia 23273-0775

RE: Employee Assistance Program Proposal for County of Henrico, Virginia (RFP #23-2515-4LOC)

Dear Ms. Collins and Ms. Taylor:

Anthem Blue Cross and Blue Shield is pleased to submit this proposal to provide the County of Henrico (the County) with a customized employee assistance program (EAP).

Our 24/7 EAP service center and account management team deliver superior EAP services, while remaining competitively priced. Also, our nationwide presence and comprehensive resources allow us to serve the County, your employees, and their families no matter where they are or the challenges they face. We understand the value of teamwork and commit to providing the County with the highest-quality services.

Our EAP integrates with Anthem's medical, care management, and behavioral health programs to provide services that meet your group's everyday needs, as well as more complex, co-morbid conditions. This level of integration provides an unmatched approach to the total care of those we serve. For example, a primary nurse can easily connect a member to the EAP for assistance with stress, depression, or other mental health issues, as well as financial, legal, and care services. At the same time, our EAP professionals can connect members experiencing a medical concern to a nurse for guidance. This bidirectional approach ensures we are addressing the total healthcare needs of members.

After reviewing the information provided about our EAP, please feel free to contact me at 804-354-7854 or Elizabeth Rutledge, your EAP account manager, at 804-971-2705 with any questions you may have.

Sincerely,



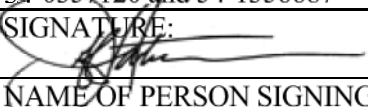
Jeff Hartman  
Strategic Account Manager

## ATTACHMENT A PROPOSAL SIGNATURE SHEET

My signature certifies that the proposal as submitted complies with all requirements specified in this Request for Proposal ("RFP") No. 23-2515-4LOC – Employee Assistance Program.

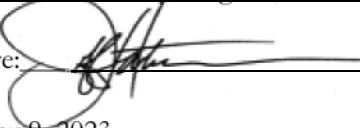
My signature also certifies that by submitting a proposal in response to this RFP, the Offeror represents that in the preparation and submission of this proposal, the Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person or business entity, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraining of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a legal representative for the business entity submitting this proposal.

LEGAL NAME OF OFFEROR (DO <u>NOT</u> USE TRADE NAME):
Anthem Health Plans of Virginia, Inc. and HealthKeepers, Inc.
ADDRESS:
2015 Staples Mill Road
Richmond, Virginia 23230
FEDERAL ID NO: 54-0357120 and 54-1356687
SIGNATURE: 
NAME OF PERSON SIGNING (PRINT): Jeff W. Hartman
TITLE: Strategic Account Manager
TELEPHONE: 804-354-7854
FAX: Not applicable.
EMAIL ADDRESS: jeff.hartman@anthem.com
DATE: May 9, 2023

## ATTACHMENT B BUSINESS CATEGORY CLASSIFICATION FORM

Company Legal Name: Anthem Health Plans of Virginia, Inc. / HealthKeepers, Inc.

This form completed by: Signature:  Title: Strategic Account Manager

Date: May 9, 2023

PLEASE SPECIFY YOUR BUSINESS CATEGORY BY CHECKING THE APPROPRIATE BOX(ES) BELOW.

(Check all that apply.)

- ☐ SMALL BUSINESS
- ☐ WOMEN-OWNED BUSINESS
- ☐ MINORITY-OWNED BUSINESS
- ☐ SERVICE-DISABLED VETERAN
- ☐ EMPLOYMENT SERVICES ORGANIZATION
- ☒ NON-SWaM (Not Small, Women-owned or Minority-owned)

**SUPPLIER REGISTRATION** – The County of Henrico encourages all suppliers interested in doing business with the County to register with eVA, the Commonwealth of Virginia's electronic procurement portal, <http://eva.virginia.gov>.

eVA Registered? ☒ Yes ☐ No

If certified by the Virginia Minority Business Enterprises (DMBE), provide DMBE certification number and expiration date.

\_\_\_\_\_ NUMBER

\_\_\_\_\_ DATE

### DEFINITIONS

For the purpose of determining the appropriate business category, the following definitions apply:

**"Small business"** means a business, independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or annual gross receipts of \$10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

**"Women-owned business"** means a business that is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

**"Minority-owned business"** means a business that is at least 51 percent owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

**"Minority individual"** means an individual who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:

1. "African American" means a person having origins in any of the original peoples of Africa and who is regarded as such by the community of which this person claims to be a part.
2. "Asian American" means a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Mariana Islands, the Philippines, a U.S. territory of the Pacific, India, Pakistan, Bangladesh, or Sri Lanka and who is regarded as such by the community of which this person claims to be a part.
3. "Hispanic American" means a person having origins in any of the Spanish-speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who is regarded as such by the community of which this person claims to be a part.
4. "Native American" means a person having origins in any of the original peoples of North America and who is regarded as such by the community of which this person claims to be a part or who is recognized by a tribal organization.

**"Service disabled veteran business"** means a business that is at least 51 percent owned by one or more service disabled veterans or, in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more individuals who are service disabled veterans and both the management and daily business operations are controlled by one or more individuals who are service disabled veterans.

**"Service disabled veteran"** means a veteran who (i) served on active duty in the United States military ground, naval, or air service, (ii) was discharged or released under conditions other than dishonorable, and (iii) has a service-connected disability rating fixed by the United States Department of Veterans Affairs.

**"Employment services organization"** means an organization that provides community-based employment services to individuals with disabilities that is an approved Commission on Accreditation of Rehabilitation Facilities (CARF) accredited vendor of the Department of Aging and Rehabilitative Services.

**ATTACHMENT C**  
**Virginia State Corporation Commission (SCC)**  
**Registration Information**

**The Offeror:**

☒ is a corporation or other business entity with the following SCC identification number:

Anthem Health Plans of Virginia, Inc.: 0042247-7

HealthKeepers, Inc.: 0269146-7

**-OR-**

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Bidder's out-of-state location) **-OR-**

☐ is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned Bidder's current contracts with Virginia and describes why those contracts do not constitute the transaction of business in Virginia within the meaning of §13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids: ☐

## ATTACHMENT D

### PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION

NAME OF OFFEROR: Anthem EAP

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Va. Code § 2.2-4342(F) in writing, either before or at the time the data or other materials are submitted. The Offeror must specifically identify the data or materials to be protected including the section(s) of the proposal in which it is contained and the pages numbers, and state the reasons why protection is necessary. A summary of trade secrets and proprietary information submitted shall be submitted on this form. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying an entire proposal, any portion of a proposal that does not contain trade secrets or proprietary information, line item prices, or total proposal prices as proprietary or trade secrets. If, after being given reasonable time, the Offeror refuses to withdraw such classification(s), the proposal will be rejected.

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE
Scope of Services, Section B, Question 10: Fitness for Duty Examination	15	These pages contain information relating to "trade secrets" and "proprietary information," including processes, operations, style of work, apparatus, or confidential statistical data, as underlined. See Virginia Public Procurement Act, Section 2.2-4342. Unauthorized disclosure of such information would violate the Trade Secrets Act 18 U.S.C. 1905.
Scope of Services, Section B, Question 12: Billing	20	
Experience and Qualifications, Question b, i: Current Organizational Structure and ii: Retention Rate of Current Staff	21	
Experience and Qualifications, Question b, iii: Associate Qualifications, Training and After-Hours Support	22	
Experience and Qualifications, Question b, iv: Assessments and Training	23-24	
Experience and Qualifications, Question b, v: Accreditation	24	
Experience and Qualifications, Question b, vi: Current Liability and Malpractice Coverage	24-25	

Experience and Qualifications, Question e: Subcontractors	26	<p>These pages contain information relating to “trade secrets” and “proprietary information,” including processes, operations, style of work, apparatus, or confidential statistical data, as underlined. See Virginia Public Procurement Act, Section 2.2-4342. Unauthorized disclosure of such information would violate the Trade Secrets Act 18 U.S.C. 1905.</p>
Implementation of Services/Project Management, Question a, iii: Bank of Hours, Anthem Integration and Guest Website Login	27-28	
Implementation of Services/Project Management, Questions a, xi and xii: Provider Network Statistics	31-32	
Implementation of Services/Project Management, Question a, xiv AND Question b: Subcontractors	32 & 33	
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**ATTACHMENT E**  
**COUNTY OF HENRICO**  
**INSURANCE SPECIFICATIONS**

The following insurance coverages and limits are required in order to provide goods, services, construction, professional and non-professional services to Henrico County general government agencies and Henrico County Public Schools. These requirements are specific to this procurement and may or may not be the same for future requests.

**Please be sure and review the Additional Requirements Section**

The Successful Bidder/Offeror shall carry Public Liability Insurance in the amount specified below, including contractual liability assumed by the Successful Bidder/Offeror, and shall deliver a Certificate of Insurance from carriers licensed to do business in the Commonwealth of Virginia and that is representative of the insurance policies. The Certificate shall show that the policy has been endorsed to add the County of Henrico and Henrico County Public Schools named as an additional insured for the Commercial General Liability coverage. **The certificate must not show in the description of operations section that it is issued specific to any bid, job, or contract.** The coverage shall be provided by a carrier(s) rated not less than “A-” with a financial rating of at least VII by A.M. Best or a rating acceptable to the County. In addition, the Successful Bidder/Offeror shall agree to give the County a minimum of 30 days prior notice of any cancellation or material reduction in coverage.

**Workers’ Compensation**

Statutory Virginia Limits

Employers’ Liability Insurance - \$100,000 for each Accident by employee  
\$100,000 for each Disease by employee  
\$500,000 policy limit by Disease

**Commercial General Liability**

\$1,000,000 each occurrence including contractual liability for specified agreement  
\$2,000,000 General Aggregate (other than Products/Completed Operations)  
\$2,000,000 General Liability-Products/Completed Operations  
\$1,000,000 Personal and Advertising injury  
\$ 100,000 Fire Damage Legal Liability

**Business Automobile Liability** – including owned, non-owned and hired car coverage

Combined Single Limit - \$1,000,000 each accident

**Umbrella Liability**

\$2,000,000 Per Occurrence and in the aggregate

## Additional Requirements

In addition to the requirements above, the Successful Bidder/Offeror shall thoroughly review the scope of work that is included and if any of the following are included in the services that will be provided, the following additional insurance will be required, if required:

- ☒ **Professional Liability - \$5,000,000 Per Occurrence (or limit in accordance with Statute for Medical Professional)**  
Required if the Scope includes providing advice or consultation including but not limited to; lawyers, bankers, physicians, programming, design (including construction design), architects & engineers and others who require extensive education and/or licensing to perform their duties.
- ☒ **Cyber Liability - \$2,000,000 Per Occurrence**  
Required if the Scope includes the collection and electronic transmittal of Personal Health Insurance (PHI), or any other demographic data on individuals including but not limited to Name, Address, Social Security Numbers or any other sort of personally identifying information.
- ☐ **Abuse and Molestation Coverage - \$1,000,000 Per Occurrence**  
Required if the scope of work includes the offering of professional or non-professional services to any child or student where one on one contact or consultation is to be provided.
- ☐ **Pollution Liability - \$1,000,000 Per Occurrence**  
Required if the scope of work involves the use (other than in a motor vehicle) or removal of a substance or energy introduced into the environment that potentially has an undesired effect or affects the usefulness of a resource. These include, but are not limited to Asbestos, PCB's, Lead, Mold, and Fuels.
- ☐ **Explosion, Collapse & Underground Coverage (XCU)**  
Required of a Contractor in limits equal to the General Liability Limit when the Scope includes any operations involving Blasting, any work underground level including but not limited to wires, conduit, pipes, mains, sewers, tanks, tunnels, or any excavation, drilling, or similar work.
- ☐ **Builders Risk Coverage**  
Required if the scope of work includes the ground up construction of a structure. Limit of insurance shall be 100% of the completed value of the structure. For projects for the renovation of an existing structure, The County shall insure the Builder's Risk with the Contractor being responsible for the first \$10,000 of any claim.
- ☐ **Other as Specified Below**  
\_\_\_\_\_

**NOTE 1:** The commercial general liability insurance shall include contractual liability. The contract documents include an indemnification provision(s). The County makes no representation or warranty as to how the Bidder/Offeror's insurance coverage responds or does not respond. Insurance coverages that are unresponsive to the indemnification provision(s) do not limit the Bidder/Offeror's responsibilities outlined in the contract documents.

**NOTE 2:** The intent of this insurance specification is to provide the coverage required and the limits expected for each type of coverage. With regard to the Business Automobile Liability and Commercial General Liability, the total amount of coverage can be accomplished through any combination of primary and excess/umbrella insurance. This insurance shall apply as primary insurance and non-contributory with respect to any other insurance or self-insurance programs afforded the County of Henrico and Henrico County Public Schools. This policy shall be endorsed to be primary with respect to the additional insured.

**NOTE 3:** Title 65.2 of the Code of Virginia requires every employer who regularly employs three or more full-time or part-time employees to purchase and maintain workers' compensation insurance. If you do not purchase a workers' compensation policy, a signed statement is required documenting that you are in compliance with Title 65.2 of the Code of Virginia.

**NOTE 4:** The Certificate Holder Box shall read as follows:  
*County of Henrico*  
*Risk Management*  
*PO Box 90775*  
*Henrico, VA 23273*

**ATTACHMENT F**  
**DIRECT CONTACT WITH STUDENTS**

Name of Offeror: Anthem Health Plans of Virginia, Inc.: 0042247-7 / HealthKeepers, Inc.: 0269146-7

Pursuant to Va. Code § 22.1-296.1, as a condition of awarding a contract for the provision of services that require the contractor or employees of the contractor to have direct contact with students on school property during regular school hours or during school-sponsored activities, the contractor shall provide certification of whether any individual who will provide such services has been convicted of any violent felony set forth in the definition of barrier crime in subsection A of Va. Code § 19.2-392.02; any offense involving the sexual molestation, physical or sexual abuse, or rape of a child; or any crime of moral turpitude.

Any individual making a materially false statement regarding any such offense is guilty of a Class 1 misdemeanor and, upon conviction, the fact of such conviction is grounds for the revocation of the contract to provide such services and, when relevant, the revocation of any license required to provide such services.

**As part of this submission, I certify the following:**

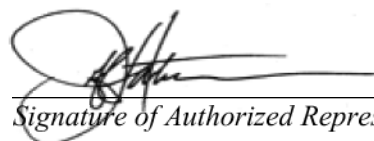
- ☒ **None of the individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities have been convicted of a violent felony set forth in the definition of “barrier crime” in Va. Code § 19.2-392.02(A); an offense involving the sexual molestation, physical or sexual abuse, or rape of a child;**

**And (select one of the following)**

- ☒ **None of the individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities have been convicted of any felony or any crime of moral turpitude.**

**or**

- ☐ **One or more individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities has been convicted of a felony or crime of moral turpitude that is not set forth in the definition of “barrier crime” in Va. Code § 19.2-392.02(A) and does not involve the sexual molestation, physical or sexual abuse, or rape of a child. (In the case of a felony conviction meeting these criteria, the contractor must submit evidence that the Governor has restored the individual’s civil rights.).**



*Signature of Authorized Representative*

Jeff W. Hartman, Strategic Account Manager  
*Printed Name of Authorized Representative*

Anthem Health Plans of Virginia,  
Inc./HealthKeepers, Inc.  
*Printed Name of Vendor*  
*(if different than Representative)*

May 9, 2023

## **Anthem EAP Default Statement**

Our company and its affiliated entities have many contractual relationships with members, vendors, and providers, as well as others. As part of our business operations, contract disputes may arise from time to time. As a publicly traded company, our ultimate parent company, Elevance Health, discloses matters that may have a materially adverse impact on our business in our public filings with the U.S. Securities and Exchange Commission.

## Statement of the Scope of Services

### SCOPE OF SERVICES

Offerors, in concise terms, shall state their understanding of the Scope of Services requested.

A. The Successful Offeror shall provide all labor, materials and supervision necessary to provide a program which addresses, but is not limited to the following problem areas:

1. Chemical dependency/substance abuse

Confirmed.

2. Job related/career

Confirmed with exception. We provide counseling and Work-Life Services to support employees with job-related issues. However, we do not provide career counseling services.

3. Marital/relationship

Confirmed.

4. Situational stress

Confirmed.

5. Parent/child relationship

Confirmed.

6. Aging parents

Confirmed.

7. Conflict resolution

Confirmed with exception. We do not provide formal conflict resolution services but can address matters that may be resulting in conflicts.

8. Other external concerns which contribute to personal problems'

Confirmed. In addition to counseling services, we offer Emotional Well-being Resources, an online set of self-management learning modules and coaching availability to address stress, anxiety, and depression, as well as sleep and substance use issues.

We also provide Work-Life Services with our EAP, which includes resources and referrals from consultants for a variety of everyday living needs, such as childcare/eldercare services, financial and legal telephonic and in-person consultations, and identity theft monitoring and support.

9. Providers who are specially trained to see Police, Fire and Sheriff employees

Confirmed. In addition to EAP providers, we offer services to several law enforcement organizations in the U.S. and recognize the many concerns this population, as well as fire protection personnel, may have. Our goal is to meet members where they are and make services easy to access.

We offer multiple points of contact, including phone and the EAP website, including our Emotional Well-being Resources digital tool that offers resources for several topics, such as depression, anxiety, and post-traumatic stress, as well as sleep and substance use.

We also provide a variety of care options, including in-person, virtual, and telephonic counseling to fit busy and overnight work schedules.

10. Fitness for Duty Examination – Public Safety only

[REDACTED]

B. These services shall:

1. Include full-time and permanent part-time employees as well as their household members as eligible participants in the EAP.

Confirmed. All full-time and part-time County employees, as well as their eligible household members, will have access to the EAP. We define other eligible household members as anyone residing in the employee's household, as well as the employee's legal dependents.

2. Provide up to six (6) EAP sessions per employee per presented issue that are one (1) hour in duration.

Confirmed. Our proposal includes six sessions per eligible member per issue per year. EAP counseling sessions generally last 50 minutes.

3. Provide an EAP that assures complete confidentiality for all participants.

Confirmed. Confidentiality is a key component of our EAP, which is HIPAA-compliant and adheres to all state and federal laws. Our EAP also adheres to professional licensure standards pertaining to confidentiality and privilege as follows:

- We strive to ensure the confidentiality of participant information used for any purpose.
- All participants have the opportunity to consent or deny the release of identifiable information.

- We inform all participants who receive telephonic counseling by EAP clinical associates of the Notice of Privacy on the EAP website and offer a copy of the notice via mail, fax, or email. We document participants' responses appropriately in their records. Our associates' ability to offer this notice may be limited in crises (HIPAA-compliant).
- Only with a valid written consent, we release individual information.
- We accept parents'/legal guardians' consent for minors.
- Legal guardians may also give consent for others unable to give their own consent (that is, demented elderly, other individuals with diminished mental capacity, or deceased participants).

The EAP requires signed consents consistent with the limitations established by HIPAA and other federal and state regulations. Exceptions to confidentiality guarantees established by law include when illegality, abuse, or threat of harm is evident. The law defines confidentiality limits in these situations and mandates counselors report suspected abuse to the appropriate authorities when the following occurs:

- Participant authorizes the release of information with a signature.
- Individual represents, in the EAP counselor's opinion, a physical danger to self or others.
- Counselor suspects child, elder, or dependent abuse or neglect.
- Court issues an order for the EAP records.
- Participant has a medical emergency.
- Law requires disclosure as otherwise specifically required.

Employees must sign and date a detailed authorization form to release confidential information for case management services resulting from formal management referrals. Our EAP maintains secure administrative systems for clinical tracking, claims payment, and client billing, as well as provider network management, reporting, and quality assurance. Additionally, for confidentiality purposes, we do not track individual use of our website or maintain EAP treatment plans and case records online.

We do not relay individual employees' counseling progress to the employer without appropriate informed consent. However, we do provide utilization reports that include the number of individuals accessing the EAP, levels of service offered and delivered, and types of problems represented by the cases, as well as limited demographics, such as employee versus dependent. We never provide individual identifying information in utilization reports.

4. Establish an appointment for the assessment of the participant's problem within two business days or within a reasonable time of the initial referral to the Successful Offeror. The initial referral may be made by the employee/household member directly, or by the employee's supervisor.

Confirmed. We can provide urgent appointments within two business days (48 hours) as necessary and within five business days for routine appointments resulting from members' self-referrals or through a formal Management Referral Program. Our EAP providers offer variable office hours depending on their practices and member needs.

More than 85% of our EAP network providers maintain office hours Monday through Friday from 9 a.m. to 8 p.m. with weekend availability from 9 a.m. to 3 p.m. in the Eastern time zone. The remaining 15% maintain published hours less than five days per week but offer similar evening and weekend appointment times. In addition, our Virtual Visits provide online EAP counseling seven days per week, from 7 a.m. to 11 p.m. ET.

5. Assure that through appropriate interviews, the Successful Offeror shall determine the nature of the problem, severity, and a mutually agreed upon plan for resolution.

Confirmed. Our intake assessment includes questions about the presenting problem, accompanying symptoms, and a timeframe to resolve the problem. The assessment also explores any substance use or domestic abuse issues.

Our providers offer expertise in EAP counseling, emphasizing focused problem-solving and short-term interventions. The initial assessments can uncover member problems and needs, while providers determine the appropriate level of care needed to resolve issues. The EAP provider and member also explore work-related problems, support network, and whether any legal or financial stressors are factors.

6. Provide participants access to a crisis line by using a toll-free number for assessment and referral services with counselors associated with the Successful Offeror. A toll-free number for participants shall be provided 24-hours a day, 7 days a week, 365 days a year.

Confirmed. Our EAP member services representatives and clinical associates are available around-the-clock to assist members and support callers in crisis.

7. Provide referrals to community and private resources for treatment of problems in accordance with the plan for resolution and in conjunction with County health care plans as appropriate.

Confirmed. With backup and support as needed from EAP service center associates, providers can transition members into additional treatment programs as follows:

- Behavioral health benefits: As they collaborate to develop a treatment plan, providers make sure members understand their behavioral health benefits. For most transitions into outpatient mental health services, providers simply request authorization from the member's medical carrier. Members can then remain in counseling with their EAP providers, though they become responsible for any cost-sharing.

We make every attempt to refer members to EAP providers who accept their medical insurance and inform them that any services after their EAP counseling sessions are their financial responsibility.

EAP providers can also help members transition into inpatient mental health or substance abuse treatment by coordinating directly with facility staff, as members authorize (HIPAA-compliant).

- Community resources: Our providers consider multiple factors before recommending community resources, including quality, cost, and appropriateness, as well as cultural/language relevance and convenience. EAP providers only recommend reputable programs with proven treatment modalities, such as condition-specific support groups, community mental health centers, and victim assistance programs, as well as cultural centers. Providers routinely help members make educated choices about community resources for specific life management issues.
- Other benefits/programs: We work with multiple vendors, including disability carriers, wellness programs, and health management services. Our EAP associates can coordinate referrals and handle transfers on behalf of members as required by the County. However, the EAP is not responsible for the inclusion or exclusion of any particular service or benefit under any health benefits/insurance plans or other benefits.

8. Provide information and/or training for employees to acquaint them with the purpose, benefits and available services. One example of the information provided may be in the form of a flyer/educational piece that can be both electronically sent (via email) to employees from the Human Resources department and printed to be sent to employees without electronic access.

Confirmed. The active promotion of your EAP services directly impacts our success in increasing employee productivity and decreasing absenteeism. Our EAP includes the following materials. Please see examples in our Appendix.

- Posters to prominently display throughout the workplace to remind employees about the EAP
- Member brochures to introduce employees to the EAP and explain how to access services
- Flyers to remind members of specific EAP services
- Email messaging for distribution to employees by a County representative
- Online orientations for employees and family members, with a manager version
- News articles and educational materials on issues that may affect job performance, such as stress, violence in the workplace, or substance use, for inclusion in internal communications
- Monthly webinars on a variety of topics, including:
  - Caregiving
  - Creativity
  - Negativity
  - Parenting
  - Resiliency
  - Work-life balance

- Emotional support
- Multigenerational issues
- Grief and loss
- Professional development
- Stress management
- Health and wellness
- Legal and financial matters
- Personal relationships

9. Provide the County and HCPS monthly reports containing data and statistical information with respect to utilization of the EAP. The reports shall assure confidentiality of participants of the program. Reports shall be emailed to:

General Government: [hremployeeerelations@henrico.us](mailto:hremployeeerelations@henrico.us)

HCPS: [nejoltjenbru@henrico.k12.va.us](mailto:nejoltjenbru@henrico.k12.va.us)

Confirmed with exception. Our EAP will include quarterly utilization reports. Elizabeth Rutledge, EAP account manager, will contact your designated representatives to review and discuss reporting, which we deliver by email 45 days after the close of the reporting period. Each report will include a cover letter analyzing your utilization trends and separated by County organizations.

We rely on the extensive capabilities of our database systems to organize information for accurate and timely utilization reporting, collecting, and monitoring of EAP utilization statistics. We offer a standard reporting suite and can generally provide customized information upon request.

We are proactive and preventive in identifying workplace trends. Elizabeth will report any identified issues applicable to your group upon recognition.

Our reports allow you to monitor member utilization and the type and quality of services we provide. Please note, we do not disclose member-specific information and strictly maintain user confidentiality. Our reporting can identify needs for workshops, special training, or other activities to address areas of concern.

10. The location of facilities where participants will meet with the Successful Offeror for counseling sessions shall not be located in any facility which houses County or Schools operations.

Confirmed. In-person counseling occurs in individual EAP provider offices. We offer in-person counseling on referral to our proprietary EAP network and internally manage that provider network of more than 40,000 behavioral health clinicians. We also offer Virtual Visits and telephonic counseling sessions in each member's choice of location.

We directly contract with licensed, master's level (or above) psychologists, social workers, and professional counselors, as well as psychiatric or behavioral health nurse specialists and marriage and family therapists. All our EAP providers hold licenses to independently practice as behavioral health professionals in their respective states of practice and have five or more years of clinical experience, as well as experience providing EAP services to diverse populations.

11. Provide the services of a qualified substance abuse professional as required under the commercial driver's license program through the Department of Labor.

Confirmed with exception. We can facilitate substance abuse professional (SAP) referrals related to Department of Transportation (DOT) licensing of employees on a pass-through, fee-for-service basis. For referrals of DOT-covered employees to the EAP due to positive test results, we will assess each employee and refer them to an established SAP network. We will also provide the referral information to the designated employer representative as appropriate. The cost of services provided by the SAP is not covered by the EAP.

12. Billing shall occur monthly to the respective Human Resources offices.

General Government: [hremployeeerelations@henrico.us](mailto:hremployeeerelations@henrico.us)

HCPS: [nejoltjenbru@henrico.k12.va.us](mailto:nejoltjenbru@henrico.k12.va.us)

[REDACTED]

## Experience and Qualifications

Offerors shall provide documentations with the following information:

- a. Company Profile – present a company profile that demonstrates Offeror have been in business for a minimum of three (3) years providing employee assistance programs, knowledge and experience of managing multiple programs and projects of similar size and scope, capacity and skills.

Anthem has provided comprehensive EAP services for over 35 years to public and private, large and small employers throughout Virginia, across the U.S., and internationally. We currently serve almost 2,100 employers and more than 10.4 million members throughout the world.

We have extensive experience supporting employer groups with multiple locations. Your EAP account manager will ensure our client information system includes data on your organizations' benefits, as well as its relevant policies and procedures, to ensure appropriate member services support. All EAP staff members providing service to your employees can easily access the appropriate information and resources to ensure an optimal member experience.

Our EAP network is comprised of master's-level clinicians across the U.S., making it easy for members to get the care they need wherever they are — on vacation from work, traveling on County business, or visiting relatives. Members can call us for a referral or use the Provider Finder tool on the EAP website to locate a clinician and begin the authorization process. These resources are available at any time. In addition, we offer access to master's-level clinicians in all 50 states via Virtual Visits, our telehealth solution.

As your current medical plan carrier, we believe we have also exemplified our experience and qualifications to provide your EAP.

- b. Project and Support Staffing - Provide organization information that should include but not limited to:

- i. Current organizational structure.

[illegible]

- ii. Retention rate of current staff.

\_\_\_\_\_

- iii. The specialty areas in which staff have expertise in counseling, i.e. family life, substance abuse, etc.

[REDACTED]

• [REDACTED]

• [REDACTED]

• [REDACTED]

• [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- iv. Demonstrate staff's, qualifications and experience in providing the services as requested in this Request for Proposal. Submit current resumes and licenses as applicable, of any staff that will be providing the services to the County.

[REDACTED]

[REDACTED]

• [REDACTED]

• [REDACTED]

• [REDACTED]

• [REDACTED]

- [illegible]

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v. Organizational licenses or accreditation, as applicable.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

vi. Current liability and malpractice coverage, as applicable.

[REDACTED]

[REDACTED]

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[REDACTED]

[REDACTED]

- c. References – Provide at least three (3) firms who could attest to the Offeror's past performance of providing employee assistance programs within the past 12 months. Include the firm's name, address, contact person name, email, and telephone number. Offerors may not use Henrico County as one of their references.

We will provide references upon our selection for the finalist phase of this proposal process.

As the current medical plan carrier, we believe we currently exemplify the performance that the County can expect of our EAP staff and account manager when we add EAP services, including Work-Life Services, to your benefits portfolio.

- d. Business Health Summary including years in business under the Offeror's present name and information documenting the Offeror's financial stability including its latest audited financial statement.

Our parent company remains in a strong financial position with a diverse investment portfolio and strong liquidity. The company and its subsidiaries remain well-capitalized and have a strong business profile. Please refer to our website for more information and the latest audited financial statement: <https://ir.elevancehealth.com/financials/quarterly-results/default.aspx>

- e. If sub-consultants are to be utilized, provide similar documentation to what has been requested of the Offeror in this section.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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## Implementation of Services / Project Management

In this tab, Offerors, shall provide their company project approach/management to include the following information:

a. An outline of how the EAP program is conducted that should include but not necessarily be limited to:

i. Program and procedures development.

We rely on the experience and expertise of our clinical staff for development of programming. By considering the County's needs and those of its employees, we can create innovative and effective solutions based on past successful programs and our proven workplace policies and procedures. Working together with your representatives and focusing on the same strategic objectives, we can deliver superior programs and results.

Our proposal includes a designated EAP service center team, led by a clinician with in-depth knowledge of your EAP and behavioral health benefits. This lead will serve as the primary point of contact for escalated needs, including management consultations and requests for critical incident response (CIR) services. Supporting the lead will be specialized clinicians and member services representatives, who will all receive additional training on County benefits. During times of critical need, our entire team will support the County's leadership and employees.

Elizabeth Rutledge will communicate relevant information to the team and upload the County's account profile into our EAP client management system, which incorporates any special considerations for your group. She will monitor the County's EAP, along with your representatives, to identify actionable insights that help improve the quality and cost of the EAP, as well as proactively influence employee behavior.

We will also present initiatives that provide value when placed alongside your other Anthem programs to achieve better outcomes for the County overall, employees, and their families.

ii. Definition of "household members".

We define eligible household members as anyone residing in the employee's household, as well as the employee's legal dependents.

iii. Employee and household member education and awareness.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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[REDACTED]

- iv. Advertising of the program to include printed materials. Offerors shall provide samples with proposal package.

Our EAP includes the following materials for the active promotion of services, which can affect our success in increasing the County's employee productivity and decreasing employee absences:

- Posters
- Member brochures
- Flyers
- Email promotional messages
- Online employee and manager orientations
- News articles and educational materials for internal communications
- Monthly webinars

Elizabeth Rutledge will work with your representatives to determine an appropriate promotional strategy to build awareness and inform the County's employees about the EAP. Additionally, many of our communications are also available in Spanish. Additional language translations may require fees.

- v. Conflict resolution services between employees; employees and supervisors; supervisors and supervisors.

Our EAP takes a comprehensive approach to each caller. While our proposal does not include formal conflict resolution, we offer multiple interventions to support your employees and their household members in dealing with various life stressors. Keys to our approach include:

- Face-to-face counseling and telephonic consultation from our professional and experienced network providers
- Focused solutions to empower individuals to change
- Addressing work-life balance issues

Our confidential counseling services address several issues that affect employees' life and work, including relationships, legal or financial problems, or career concerns, as well as stress, anxiety, or depression. Occasionally, situations, such as a family crisis, caring for an elderly parent, or dealing with a serious family illness can become overwhelming. Whether the issues involve substance use, emotional conflicts, or workplace trauma, the EAP can give your employees and their families the support they need.

- vi. Discuss the availability of "virtual" sessions, if available.

Virtual Visits or EAP counseling sessions via digital services are available to all the County's employees and household members, who simply:

- Schedule a first visit and connect with a provider within four days
- Engage in a 45-minute video visit, if appropriate
- Interact privately with a psychologist or therapist from a comfortable environment

- vii. Employee evaluation and diagnostic interview.

Initial assessments by EAP providers include questions about the presenting problem, accompanying symptoms, and a timeframe to resolve the problem. Each assessment also explores any substance use or domestic abuse issues. The providers and members explore work-related problems, availability of a support network, and whether any legal or financial issues are stress-causing factors.

- viii. In-House treatment insofar as practical.

Our providers offer expertise in problem-solving counseling, emphasizing focused, short-term interventions. The initial assessment uncovers the member's problems and needs, while the provider determines the appropriate level of care needed to resolve the issue, including the six-session model provided by the EAP.

## Critical Incident Response Services

For traumatic workplace events, our on-site CIR services provide a range of tools to help with the acute stress that often accompanies crises. This support may include phone consultations with individual managers, as well as sending educational materials and providing website resources for employees.

Traumatic situations can have serious long-term effects on employee morale and the County's image. Our clinical experts can coordinate innovative, flexible, and customized responses when tragedy strikes. Our team, including your EAP account manager, will consult with your representatives to determine the appropriate response and to establish expectations. By conducting this thorough assessment, considering your organizational needs and communicating the next steps, our clinicians can successfully minimize concerns and maximizing satisfaction.

- ix. Referral to community resources when needed.

Providers routinely help members make educated choices about community resources for specific life management issues. They consider multiple factors before recommending community resources, including quality, cost, and appropriateness, as well as convenience and cultural/language relevance.

x. After-care follow-up.

Clinical associates will follow up with any member who requires further care beyond the EAP to ensure they successfully enter necessary treatment with the member's permission.

- xi. Program monitoring and evaluation.

[illegible]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

xii. Monitoring and evaluation of community resources.

[REDACTED]

xiii. A description of the process to be followed when initial evaluation indicates an employee needs services beyond that which is available through EAP.

As they collaborate to develop a treatment plan, providers make sure members understand their behavioral health benefits. For most transitions into outpatient mental health services, providers simply request authorization from the member's medical carrier. Members can then remain in counseling with their EAP providers, though they become responsible for any cost-sharing.

We make every attempt to refer members to EAP providers who accept their medical insurance and inform them that any services after their EAP counseling sessions are their financial responsibility. Providers can also help members transition into inpatient mental health or substance use treatment by directly coordinating with facility staff, if members authorize their efforts (HIPAA-compliant).

The integration between the EAP provider network and the Anthem behavioral health network promotes better continuity of care for members enrolled in the coverage. We offer a seamless transition between benefits, which eliminates the potential of a member having to change providers. Anthem members can start with our EAP, and if additional care is needed, they can continue with the same therapist using their behavioral health benefits. This approach applies as well to Virtual Visits, our solution for online EAP counseling sessions.

The majority of our EAP providers (more than 92%) also participate in the Blue Cross and Blue Shield Association's program for mental health/substance abuse providers. This dual membership means Anthem members can begin counseling in the EAP and continue treatment with the same provider. We promote continuity of care to maintain the quality of service our members receive.

xiv. How the proposed program address household members that speak a language other than English.

We train all member-facing representatives and clinicians how to communicate with members from diverse backgrounds. Many of our staff members speak Spanish. We also maximize our communications capabilities through real-time telephonic interpretation from CyraCom, which offers translation support for more than 275 languages. Regardless of language needs, any member may easily communicate with our staff through this service.

Providing EAP services in a culturally competent manner allows us to ensure members receive the services they need to improve their well-being. Many of our EAP providers speak more than one language, and our EAP member services representatives are well-versed in matching members to providers with whom they can be most comfortable communicating. Numerous providers offer clinical services to multicultural populations and speak other languages.

Additionally, the EAP website has fully navigable version in Spanish. Our representatives and clinicians can assist hearing-impaired members through TDD and TTY services. We can also provide large-print and Braille print materials upon request.

xv. Reporting and monitoring capabilities. Offerors shall provide samples of the type of reports that are available.

Our EAP provides quarterly and annual utilization reports. A sample report is in the Appendix.

Elizabeth Rutledge will contact your designated representatives to review and discuss reports, which we deliver by email 45 days after the close of the reporting period. A cover letter with each report will provide analysis of your group's utilization trends. With our proactive and preventive stances for identifying workplace trends, Elizabeth will report any issues to you upon recognition.

The extensive capabilities of our database systems organize information to provide accurate and timely collecting, monitoring, and reporting of utilization statistics. Our standard suite of usage statistics will allow your representatives to monitor member utilization and the type and quality of services provided. We do not disclose member-specific information and strictly maintain user confidentiality. We also offer customized reporting to meet any additional needs you may identify, which may require fees.

Our EAP utilization reports often are the basis for planning workshops, special training efforts, or alerting organizations to areas of concern they need to address.

xvi. Employee evaluation and diagnostic interview.

The assessment includes questions about the presenting problem, accompanying symptoms, and a timeframe to resolve the problem. The assessment also explores any substance abuse or domestic abuse issues. The EAP provider and participant explore work-related problems, support network availability, and whether any legal or financial stressors are factors.

Our providers offer expertise in EAP counseling, emphasizing focused, problem-solving, short-term interventions. The initial assessment uncovers the member's problems and needs, while the provider determines the appropriate level of care needed to resolve the issue.

b. Types of services anticipated to be referred elsewhere.

Sourcing strategies have enabled us to make our services more effective, accessible, and valuable to our clients, as well as expand our programs and maintain our service levels. These relationships are subject to change; vendors providing services to the County will be determined at implementation.

We currently collaborate with the following organizations for services:

- American Substance Abuse Professionals, Inc.
- Balancing Life's Issues
- CyraCom
- Learn to Live
- LiveHealth Online
- R3 Continuum
- Workplace Options

c. Where current or proposed facilities are or will be located.

In-person counseling occurs in individual EAP provider offices, as well as through Virtual Visits and telephonic counseling in the location of the member's choosing.

- d. Written procedure on how the County will be notified of the number of employees and household members who have participated in the Employee Assistance Program. Procedure shall include an outline of company's audit procedures to be included in the program that shall assure the County that the services being provided are, in fact, rendered.

Our EAP includes quarterly and annual utilization reports to inform you of the number and types of members participating in EAP services. Elizabeth Rutledge will contact your designated representatives to review and discuss reporting, which we deliver by email 45 days after the close of the reporting period. A cover letter with analysis of your utilization trends will accompany each report. Elizabeth will also report any issues to your representatives upon recognition.

Our database systems' extensive capabilities organize group information for accurate and timely utilization reporting to facilitate monitoring workplace trends and utilization statistics. Our reports support monitoring member utilization, as well as the type and quality of provided services, without disclosing specific member information to maintain strict user confidentiality. We offer the opportunity to audit our processes as outlined below.

## Auditing

In compliance with our procedures, we can discuss auditing our procedures through review of unidentified files. A client may also audit our EAP in accordance with our external audit policy with a signed ePHI form indicating compliance with HIPAA-requirement compliance or as a covered entity by doing the following.

- Designate a privacy official
- Designate a contact person/office responsible for receiving complaints and providing further information about the client's privacy notice
- Train associates on confidentiality policies and procedures
- Document provided training
- Adopt appropriate administrative, technical, and physical safeguards to protect health information
- Provide a process for individual complaints concerning confidentiality policies and procedures or its compliance
- Document all complaints and their disposition
- Adopt and apply appropriate sanctions against staff who fails to comply with privacy policies and procedures
- Document any applied sanctions
- Mitigate, to the extent practicable, any harm known of a use or disclosure of PHI in violation of policies and procedures
- Implement policies and procedures with respect to PHI that comply with the standards, implementation specifications, or other requirements of the HIPAA Privacy Regulations

- e. Training - Discuss what topics shall be offered for employee training classes that are relevant to EAP issues. Provide samples of training materials that shall be used.

You can choose to offer any of the workshops described in our training catalog in the Appendix. Your account manager, Elizabeth Rutledge, can work with you to develop a cost-effective solution, including webcasts, sessions resulting from train-the-trainer efforts, or other remote delivery methods to serve County employees at your multiple worksites.

We encourage you to visit [anthemeap.com](http://anthemeap.com) to view the online orientations for employees and managers, as well as the monthly webinar. Those webinars cover a multitude of topics that are relevant to most employees, including:

- |                               |                            |
|-------------------------------|----------------------------|
| ○ Caregiving                  | ○ Negativity               |
| ○ Creativity                  | ○ Parenting                |
| ○ Emotional support           | ○ Personal relationships   |
| ○ Grief and loss              | ○ Professional development |
| ○ Health and wellness         | ○ Resiliency               |
| ○ Legal and financial matters | ○ Stress management        |
| ○ Multigenerational issues    | ○ Work-life balance        |

Please see the Appendix for a sample training presentation.

- f. Implementation Services - Please provide a narrative description describing your approach to providing the requested services.

During implementation, we will collaborate with your representatives to design and implement a comprehensive promotional strategy, which will include a schedule for communications. We will also identify and schedule appropriate educational opportunities, such as EAP orientations, based on the available combined bank of hours for training and CIR services.

Please see the Appendix for a sample implementation timeline, sample promotional communications, and our training catalog.

## Implementation Planning

The timeframe for new account implementation depends on the account size and complexity, as well as the services selected. We typically require 60 to 90 days to complete an EAP implementation.

The EAP account manager, Elizabeth Rutledge, will work with you and your previous EAP vendor to establish timelines and expectations for a successful, seamless transition. We will provide a list of key implementation personnel, along with their biographies, in advance of launching implementation.

The most important consideration during transition is whether in-process cases are our responsibility or the responsibility of the former EAP vendor. Standard transition-of-care policies include:

- Routine cases in treatment at the time of transition are generally the responsibility of the previous EAP vendor. Shortly before transition, the previous vendor will direct callers to our EAP to schedule an appointment with an EAP provider in our network after the transition date.
- Cases in EAP case management (for example, mandatory referrals) transition from the previous vendor to one of our clinical EAP case managers. The previous EAP vendor acquires the appropriate consents to allow the transfer.
- With the appropriate releases or as consistent with regulations, the previous vendor alerts us to clinical cases in which continuity of care is a critical issue (for example, suicidal clients).
- Participants who do not complete EAP session limits prior to the transition date can begin again under our program.

Other key implementation issues include:

- Web implementation (three weeks' lead time)
  - Provider network development (if applicable per GeoAccess report)
  - Promotional materials delivery
  - Orientation and training schedules
  - Organizational characteristics
    - Number of employees
    - Geographic concentration or distribution of employee population
    - On-site services for implementation
    - Custom features, such as phone numbers and website logos
- g. Billing Procedure – Please provide written procedure that ensures billing consistency and explain the mechanics of preparing invoices that would be billed to the County.

[REDACTED]

[REDACTED]

## **Pricing / Cost Proposal**

Offerors shall provide pricing in accordance with Attachment H. Pricing shall include all costs associated with providing the services described in the Scope of Services. This shall include all wages, taxes, supervision, equipment, supplies, insurance, training, criminal record checks, etc.

Please see Attachment H, which follows.

## ATTACHMENT H

### PRICING/COST PROPOSAL

**Option 1:** Cost for services as needed and requested which will consist of up to 6 EAP sessions per employee/household member per presented issue per year.

- a. Cost per EAP session \$ N/A
- b. Cost per hour for employee training classes to be taught on-site \$ N/A / hr. (8-hour class)  
\$ N/A / hr. (4-hour class)
- c. Cost of marketing materials (i.e. flyers). List quantities and pricing:

Description of Marketing Materials	Quantity per Unit of Measurement	Unit of Measurement	Price per Unit of Measurement
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A
N/A			\$ N/A

**Option 2:** A per employee, per month cost to include household members and up to 6 EAP sessions per employee/household member per presented issue per year.

- a. \$1.82 Rate is per employee, per month for 2023-24. We agree to each renewal's increase not to exceed 3% above the previous year's fee.
- b. Cost per EAP session \$ N/A
- c. Cost per hour for employee training classes to be taught on-site \$ N/A / hr. (8-hour class)  
\$ N/A / hr. (4-hour class)

Our proposal includes an annual bank of 100 hours that may be used for trainings and critical incidents. After the bank is exhausted additional trainings are \$250 per hour per presenter. Additional critical incidents are \$300 per hour.

Fitness for Duty (FFD) and Substance Abuse Professional evaluations are not included with our proposal. Our best practice is to connect requests for DOT/SAP or Fitness for Duty (FFD) assessments directly to a vendor who provides these specialized services. This will ensure that the employee engages in care as quickly as possible, and the referring manager receives all required documentation in a timely manner. We most frequently collaborate with American Substance Abuse Professionals for DOT/SAP needs; for FFD we collaborate with R3 Continuum. However, if you have a preferred partner, we would be glad to direct requests for services to that organization. Employees who return to work after meeting treatment requirements are often referred to the EAP as a management referral. This helps to ensure they have the tools and resources they need to maintain the gains they have made.

- d. Cost of marketing materials (i.e. flyers). List quantities and pricing:

Description of Marketing Materials	Quantity per Unit of Measurement	Unit of Measurement	Price per Unit of Measurement
Our proposal includes our standard suite of promotional materials including a poster for			\$

the workplace, brochures, and a selection of fliers. Projects such as customizing materials, home mailings, or other non-standard requests may result in an additional fee. All custom projects will be discussed in detail with County of Henrico prior to development.			
			\$
			\$
			\$
			\$

If the County decides to use option 2, provide detailed information on how billing would be structured. (i.e. Number of employees at the beginning of the month. Average number of employees over a six-month period)

Anthem response: County of Henrico is welcome to adjust the monthly payment based on the number of employees at that time. We welcome dialogue on this topic.

Other optional services offered:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

## Exceptions

Offerors shall list any exceptions taken to the Scope of Services and General Terms and Conditions of this Request for Proposals. The County intends to make the RFP and the Successful Offeror's proposal a part of the contract between the parties, so Offerors should list any exceptions for purposes of negotiating the contract.

### Scope of Services

We have the following exceptions to the Scope of Services.

#### Section A

Question 2: We do not provide career counseling services as part of the EAP.

Question 7: We do not provide formal conflict resolution services but provide services to address matters than may be resulting in conflict.

Question 10: We do not provide fitness-for-duty evaluations but facilitate referrals.

#### Section B

Question 2: Sessions generally last 50 minutes.

Question 9: We do not provide monthly reports due to the group size and typical number of services for the time period. However, we will provide quarterly and annual reporting.

Question 11: [REDACTED]

Question 12: [REDACTED]  
[REDACTED]

### Experience and Qualifications

Question c: We will provide references during the finalist phase of the proposal process.

### Implementation

The following exception is regarding Implementation:

#### Item a, Question v

We do not provide formal conflict resolution services. However, our services can assist in matters that may be causing conflicts to help employees reach resolution of the situation.

## Assumptions

Offerors shall list any assumptions made when responding to this Request for Proposals.

Our proposal includes the following assumptions:

- EAP rates are good for 180 days from the date offered.
- On-site services beyond the provided bank of combined hours are \$250 per hour/facilitator.
- On-site CIR services are \$300 per hour/facilitator/location after depletion of the included bank of combined hours.
- We bill travel at cost.
- We will ship printed materials to a central location for distribution.



[REDACTED]



[REDACTED]

Pricing may be subject to revision should assumptions detailed above change.

EAP fees do not include:

- Responsibility for the inclusion or exclusion of any particular service or benefit under a member's other coverage (for example, group health plan or health benefit/insurance plan)
- Evaluations or reports for a legal proceeding
- Fitness-for-duty evaluations
- SAP evaluations or recommended treatment
- Authorizations for an employee to take a leave of absence or time off
- Counseling mandated by a court of law or government agency
- Determinations or reports related to Family Medical Leave Act or short/long-term disability
- Specialized treatment or evaluations required as a condition of parole, probation, custody, visitation, or forensic evaluations

## Appendices

Optional for Offerors who wish to submit additional material that will clarify their response.

Following are our appendices to our proposal:

- Anthem EAP Promotional Communications Examples
- 2023 Anthem EAP Training Catalog
- Anthem EAP Sample Report
- Sample Anthem EAP Training Materials
- Anthem EAP Sample Implementation Plan

# Employee Assistance Program Service Summary



Effective date: 00/00/2023

Available 24/7, 365 days a year  
Everything you share is confidential\*

Life can be full of challenges. Your Anthem Employee Assistance Program (EAP) is here to help you and your household members. EAP offers a wide range of **no-cost** support services and resources, including:



## Counseling

- Up to 5 visits per issue
- In-person or online visits
- Call EAP or use the online Member Center to initiate services



## Legal consultation

- 30-minute phone or in-person meeting
- Discounted fees to retain a lawyer
- Free legal resources, forms, and seminars online



## Financial consultation

- Phone meeting with financial professionals
- Regular business hours; no appointment required
- Free financial resources and budgeting tools online



## ID recovery

- Help reporting to consumer credit agencies
- Assistance with paperwork and creditor negotiations



## Emotional Well-being Resources

- Digital tools to improve emotional well-being
- Team up with an experienced clinical coach
- Practice mindfulness on the go



## Dependent care and daily living resources

- Online information about child care, adoption, elder care, and assisted living
- Phone consultation with a work-life specialist
- Help with pet sitting, moving, and other common needs



## Other anthemEAP.com resources

- Well-being articles, podcasts, and monthly webinars
- Self-assessment tools for emotional health issues



## Crisis consultation

- Toll-free emergency number; 24/7 support
- Online critical event support during crises

## We are ready to support you

You can call us at 800-000-0000 or go to  
**anthemEAP.com** and enter your company code:

**When something unexpected happens, EAP can help you figure out your next steps. Contact us today.**

\* In accordance with federal and state law, and professional ethical standards.

This document is for general informational purposes. Check with your employer for specific information on the services available to you.

Language Access Services – (TTY/TDD: 711)

Spanish – Tiene el derecho de obtener esta información y ayuda en su idioma en forma gratuita. Llame al número de Servicios para Miembros que figura en su tarjeta de identificación para obtener ayuda.

Chinese – 您有權使用您的語言免費獲得該資訊和協助。請撥打您的 ID 卡上的成員服務號碼尋求協助。

Anthem complies with applicable federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex.

Anthem Blue Cross and Blue Shield is the trade name of: In Colorado: Rocky Mountain Hospital and Medical Service, Inc. HMO products underwritten by HMO Colorado, Inc. Copies of Colorado network access plans are available on request from member services or can be obtained by going to [anthem.com/co/networkaccess](http://anthem.com/co/networkaccess). In Connecticut: Anthem Health Plans, Inc. In Georgia: Blue Cross Blue Shield Healthcare Plan of Georgia, Inc. In Indiana: Anthem Insurance Companies, Inc. In Kentucky: Anthem Health Plans of Kentucky, Inc. In Maine: Anthem Health Plans of Maine, Inc. In Missouri (excluding 30 counties in the Kansas City area): RightCHOICE® Managed Care, Inc. (RIT), Healthy Alliance® Life Insurance Company (HALIC), and HMO Missouri, Inc. RIT and certain affiliates only provide administrative services for self-funded plans and do not underwrite benefits. In Nevada: Rocky Mountain Hospital and Medical Service, Inc. HMO products underwritten by HMO Colorado, Inc., dba HMO Nevada. In New Hampshire: Anthem Health Plans of New Hampshire, Inc. HMO plans are administered by Anthem Health Plans of New Hampshire, Inc. and underwritten by Matthew Thornton Health Plan, Inc. In Ohio: Community Insurance Company, Inc. In Virginia: Anthem Health Plans of Virginia, Inc. trades as Anthem Blue Cross and Blue Shield in Virginia, and its service area is all of Virginia except for the City of Fairfax, the Town of Vienna, and the area east of State Route 123. In Wisconsin: Blue Cross Blue Shield of Wisconsin (BCBSWI), underwrites or administers PPO and indemnity policies and underwrites the out of network benefits in POS policies offered by CompCare Health Services Insurance Corporation (CompCare) or Wisconsin Collaborative Insurance Corporation (WCIC). CompCare underwrites or administers HMO or POS policies; WCIC underwrites or administers Well Priority HMO or POS policies. Independent licensees of the Blue Cross and Blue Shield Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc.



# Find help today

Receive support when and how you need it.



## Call us

Reach us at **800-000-0000**

24/7 for free, confidential help



## Visit our website

Go to **anthemEAP.com** and enter **Company Code** to log in

## Employee Assistance Program

**800-000-0000**

**anthemEAP.com** Enter **Company Code** to log in for free, confidential help, any time, day or night



# Your schedule, your life

EAP is here when you need support



**Your privacy matters.** If you contact EAP, no one will know, unless you give permission in writing.\* Let us give you a helping hand. Please call **800-000-0000** or go to **anthemEAP.com** and enter **Company Code** to log in.



\*In accordance with federal and state law, and professional ethical standards.

Language Access Services - (TTY) (DD: 711)  
Spanish - Tiene el derecho de obtener esta información y ayuda en su idioma en forma gratuita. Llame al número de Servicios para Miembros que figura en su tarjeta de identificación para obtener ayuda.

Chinese - 您有權使用您的語言免費獲得諮詢和協助。  
請撥打您ID卡上的成員服務號碼尋求協助。

Anthem complies with applicable federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex.

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**What is an Employee Assistance Program (EAP)?**  
It's a no-cost employee program to help you meet life's challenges. Call **800-000-0000** or visit **anthemEAP.com** and enter **Company Code** to log in. Everything you share is confidential.

## We're here for your everyday problems and questions, big or small.

### The EAP can help you:

-  Find child, elder, or pet care.
-  Work on achieving work-life balance.
-  Parent a child with special needs.
-  Deal with addiction and recovery.
-  Set retirement goals.
-  Find mental health resources and information.
-  Address financial or legal issues.

## Mark's Story







When you need some guidance, one on one — that's how EAP can help. For example, Mark\* called us during a difficult financial time:

Mark contacted EAP when he found himself unable to keep his home and struggling to find a new place to live. He was feeling a lot of stress and anxiety about the future. The EAP representative who spoke to Mark explained the different types of services available to him, including counseling, financial consultation, and help with his housing search. The representative also referred Mark to local counselors who specialized in his areas of need and directed him to emotional health resources on the EAP website.

\*Mark is not their actual name. It was changed to respect and protect privacy and identity.

### Connect with us by phone, in-person or online. You can:

-  Use our toll-free number to speak with an EAP professional.
-  Meet with a professional face-to-face.
-  Have up to 5 free counseling visits per issue per year.
-  Ask us about online visits with LiveHealth Online.

Learn more about how EAP can help you at [anthemEAP.com](https://anthemEAP.com).



### Emotional Well-being Resources

These no-cost digital tools can teach you how to manage stress, anxiety, depression, substance use, and sleep issues.

### Contact us 24/7.

The EAP is here to make sure you and your household members have the support you need for emotional well-being.

Simply call 800-000-0000 or visit [anthemEAP.com](https://anthemEAP.com) to find help right away — at no cost to you.

This document is for general informational purposes. Check with your employer for specific information about benefits, limitation and exclusions.

# Your EAP offers mental health support

Visit with a therapist from the comfort of home



If you're experiencing feelings of stress or anxiety, help is available. With your Employee Assistance Program (EAP), you can schedule a video visit with a licensed therapist when you need support. Use your phone, tablet, or computer with a camera to have a secure visit on LiveHealth Online from home.

## Support when you need it

In most cases, you can make an appointment to see a therapist within seven days or less.\*

## Start by calling your EAP at 800-000-0000 — a representative will:

- Talk to you about your therapy options, including video visits through LiveHealth Online.
- Provide a coupon code you can use to access the sessions provided by your EAP.

You have 8 visits available through your EAP at no extra cost.

## Commonly treated conditions:

- ✓ Anxiety
- ✓ Stress
- ✓ Depression
- ✓ Relationship troubles
- ✓ Parenting issues
- ✓ Grief
- ✓ Coping with illness
- ✓ Post-traumatic stress disorder



## Connect with mental health and well-being support.

Reach out to your EAP representative today for more information.

\* Appointments subject to availability.

Online counseling is not appropriate for all kinds of problems. If you are in crisis or having suicidal thoughts, it's important that you seek help immediately. Please call 800-273-8255 (National Suicide Prevention Lifeline) or 911 for help. If your issue is an emergency, call 911 or go to your nearest emergency room. LiveHealth Online does not offer emergency services.

Anthem Blue Cross and Blue Shield is the trade name of: In Colorado: Rocky Mountain Hospital and Medical Service, Inc. HMO products underwritten by HMO Colorado, Inc. Copies of Colorado network access plans are available on request from member services or can be obtained by going to [anthem.com/co/networkaccess](http://anthem.com/co/networkaccess). In Connecticut: Anthem Health Plans, Inc. In Georgia: Blue Cross Blue Shield Healthcare Plan of Georgia, Inc. In Indiana: Anthem Insurance Companies, Inc. In Kentucky: Anthem Health Plans of Kentucky, Inc. In Maine: Anthem Health Plans of Maine, Inc. In Missouri (excluding 30 counties in the Kansas City area): RightCHOICE® Managed Care, Inc. (RIT), Healthy Alliance® Life Insurance Company (HALIC), and HMO Missouri, Inc. RIT and certain affiliates administer non-HMO benefits underwritten by HALIC and HMO benefits underwritten by HMO Missouri, Inc. RIT and certain affiliates only provide administrative services for self-funded plans and do not underwrite benefits. In Nevada: Rocky Mountain Hospital and Medical Service, Inc. HMO products underwritten by HMO Colorado, Inc., dba HMO Nevada. In New Hampshire: Anthem Health Plans of New Hampshire, Inc. HMO plans are administered by Anthem Health Plans of New Hampshire, Inc. and underwritten by Matthew Thornton Health Plan, Inc. In Ohio: Community Insurance Company, Inc. In Virginia: Anthem Health Plans of Virginia, Inc. trades as Anthem Blue Cross and Blue Shield in Virginia, and its service area is all of Virginia except for the City of Fairfax, the Town of Vienna, and the area east of State Route 123. In Wisconsin: Blue Cross Blue Shield of Wisconsin (BCBSWI), underwrites or administers PPO and indemnity policies and underwrites the out of network benefits in POS policies offered by CompCare Health Services Insurance Corporation (CompCare) or Wisconsin Collaborative Insurance Corporation (WCIC). CompCare underwrites or administers HMO or POS policies; WCIC underwrites or administers Well Priority HMO or POS policies. Independent licensees of the Blue Cross and Blue Shield Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc.

# Connect with a therapist — anytime, anywhere

Your EAP offers faster access to counseling when you need it



If you or a loved one is struggling with life's challenges, finding a mental health professional to talk to quickly can make a big difference. That's why your Anthem Employee Assistance Program (EAP) is offering Talkspace, a service that provides confidential counseling by text, audio, or video — whatever way feels right for you.

## Find support for:

- Anxiety
- Depression
- Grief
- Relationships
- Sleep
- Stress
- Substance use
- Trauma

## You'll benefit from:



### Personalized match

Talkspace QuickMatch™ pairs you with a therapist who fits your needs and preferences. That helps you feel comfortable from the start.



### 24/7 access

Message your therapist via text, audio, or video whenever something comes up — or schedule a virtual visit to connect in real time.



### Experience you can count on

Talkspace includes a diverse network of professional licensed therapists in every state who treat a variety of needs.



## Sign up for Talkspace today

- Use a web browser to register at [talkspace.com/associatecare](https://talkspace.com/associatecare).
- Enter the letters "EAP", a space, and "Company Code" in the "Organization name" field.
- Complete the QuickMatch provider finder questions.
- Await your provider match, then send a message or schedule a virtual session.

## Your EAP is here with support, whatever your needs

You and your household members can get confidential support through your Anthem EAP. Connect to helpful tools, resources, and information, as well as to financial and legal advisors. Go to [anthemEAP.com](https://anthemEAP.com) and enter your Company Code.

Online counseling is not appropriate for all kinds of problems. If you are in crisis or have suicidal thoughts, it's important that you seek help immediately. Please call 988 (National Suicide Prevention Lifeline) and ask for help. If your issue is an emergency, call 911 or go to your nearest emergency room. Talkspace does not offer emergency services.

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# With you every step of the way

Emotional Well-being Resources offer help when you need it

Your emotional health is an important part of your overall health. With Emotional Well-being Resources, administered by Learn to Live, you can receive support to help you and your household live your happiest, healthiest lives.

Built on the proven principles of Cognitive Behavioral Therapy (CBT), our digital tools are available anywhere, anytime. They can help you identify thoughts and behavior patterns that affect your emotional well-being – and work through them. You'll learn effective ways to manage stress, depression, anxiety, substance use, and sleep issues.

Change your mind. Change your life.™

Take a quick assessment to find the program that's right for you. To access our Emotional Well-being Resources:

Go to [anthemEAP.com](https://anthemEAP.com) and enter your company code to log in: Company Code Call 800-000-0000 to learn more.

## A wealth of resources at your fingertips



### Personalized, one-on-one coaching

Team up with an experienced coach who can provide support and encouragement by email, text, or phone.



### Build a support team

Add friends or family members as "Teammates." They can help you stay motivated and accountable while you work through programs.



### Practice mindfulness on the go

Receive weekly text messages filled with positivity, quick tips, and exercises to improve your mood.



### Live and on-demand webinars

Learn how to improve mental well-being with useful tips and advice from experts.



Learn to Live, Inc. is an independent company offering online tools and programs for behavioral health support. Learn to Live is an education program and should not be considered medical treatment.

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# Legal, financial, and identity recovery support

Receive the help you need with your Employee Assistance Program



It can be difficult to know what to do or where to turn when legal issues, financial difficulties, and identity theft strike. Your Employee Assistance Program (EAP) can provide guidance. We have a team of experts ready to connect you with professionals who can offer advice and save you time and money. Our help is unbiased and entirely pressure free.

# Access legal, financial, and identity recovery services through your EAP



## Find peace of mind today

Visit [anthemEAP.com](https://anthemEAP.com)  
and log in by entering **code**

Speak to us directly by  
calling **800-000-0000**.

## Consult with a lawyer

The first half-hour consultation with our experienced attorneys is free and can be conducted over the phone or in person. Common topics include child custody, divorce, estate planning, and landlord disputes. In addition, you can:

- Receive a discount on fees for cases requiring additional support.
- Access our large library of online legal resources and forms.
- Use our free software to create a customized estate plan, including a will, shared or individual living trust, healthcare directive, durable power of attorney for finances, as well as over 20 additional essential documents.

## Improve your finances

This free service puts you in touch with counselors and educators who can help you strengthen your financial standing. Reach out to:

- Ask about bankruptcy, budgeting, controlling debt, estate planning, and mortgages.
- Set long-term goals to build your savings.
- Explore our online resources, including articles, financial calculators, and budgeting tools.
- Find a Certified Financial Planner™.

## Monitor or recover your identity

Your EAP also offers free monitoring and theft resolution services. Experts are accessible 24/7 to help with:

- Reviewing your credit report for indications of identity theft.
- Contacting your issuer or banking institution.
- Placing a fraud alert or security freeze with the three credit bureaus.
- Reporting to consumer credit agencies.
- Completing necessary paperwork.
- Negotiating with creditors to fix your debt history.

You're encouraged to register for an account on the EAP website before you need services. This enables our monitoring experts to act quickly when issues arise.



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# Personalized support for overcoming addiction



Addiction to a substance, such as alcohol, drugs, or nicotine, or to a behavior such as gambling, is a serious problem. It can affect all aspects of your life, from your work and relationships to your personal health.

If you are struggling with addiction, your Employee Assistance Program (EAP) offers a wide range of support and resources, available at no extra cost, to help you:

- Recognize the physical and emotional signs of substance abuse.
- Understand how drug abuse can affect others.
- Address related substance abuse issues, such as mental health problems.
- Understand your options for treatment.
- Cope with a loved one's addiction.
- Find local services and support groups.
- Access support programs, 24/7.

Your EAP also includes access to Emotional Well-being Resources, a set of digital tools you can use to help improve your emotional well-being.

These resources can help you understand addiction, begin recovery, and create healthy, lifelong habits:

## Professional counseling

Connect with a licensed professional counselor for confidential online or in-person sessions. You and your household members each receive 5 visits per issue per year.

## Educational podcasts

Learn more by listening to brief, educational podcasts from our licensed professional counselors.

## Online support

Search for "addiction" on the website to read articles that can help you and your loved ones.



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## Your EAP is here to help, 24/7

There are multiple ways to find support:

- Call 800-000-0000.
- Use our Sydney Health app.
- Go to [anthemEAP.com](http://anthemEAP.com) and enter your company code:

# Recognizing depression

Depression is a serious health condition, which isn't the same as occasionally feeling sad or discouraged. It lasts for long periods of time, and can affect the way you think and behave. Changes in sleep, appetite, energy, and focus are all common signs.

If you or a loved one struggles with depression, your Employee Assistance Program (EAP) offers a wide range of support and resources available at no extra cost, including:

- Screenings to help diagnose depression.
- Information on treating depression.
- Free confidential counseling, in-person or online.
- Referrals to support groups and treatment.
- Tips for helping a loved one who is experiencing depression.

Your EAP also includes access to Emotional Well-being Resources, a set of digital tools you can use to help improve your emotional well-being.

These resources can help you recognize depression and find the treatment and support that's right for you:

## Professional counseling

Connect with a licensed professional counselor for confidential online or in-person sessions. You and your household members each receive 5 visits per issue per year.

## Educational podcasts

Learn more by listening to brief, educational podcasts from our licensed professional counselors.

## Online support

Search for "depression" on the website to read articles that can help you and your loved ones.



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- Go to [anthemEAP.com](https://www.anthemEAP.com) and enter your company code:



# Your Employee Assistance Program website

A resource for finding support, 24/7

Your Employee Assistance Program (EAP) is here to help you and your household members meet life's challenges — big or small. The EAP website houses educational articles, podcasts, online seminars, and other resources to support your work-life balance and emotional health needs. Our offerings include:

## Work-life balance

**Money, budgeting, and identity theft protection.** Learn about credit card debt, loan rates, retirement planning, and financial calculators — or access our discount-shopping program for savings of up to 25%.

**Legal services.** Consult a professional about small claims court, traffic violations, will creation, and other legal matters.

**Parenting tools and insight.** Research expert advice on adoption, reducing school anxiety in children, promoting college readiness, raising children with special needs, and becoming a blended family.

**Search for care.** Your EAP can help you find high-quality child, elder, and pet care. You can even talk to a work-life specialist using instant messaging through LiveCONNECT.

**Healthy lifestyle tips and resources.** Receive guidance for improving your eating, fitness, and sleeping habits.

## Emotional health and well-being

**Stress, anxiety, and depression.** Discover new stress relief techniques and connect with behavioral health information, services, and programs.

**Addiction and recovery.** Explore guidance and support focused on long-term treatment.

**Grief and loss.** Access emotional health resources, including a digital library of well-being articles and crisis intervention materials.

**Emotional Well-being Resources.** Your EAP also includes access to a set of digital tools you can use to help improve your emotional well-being.

**Extra support.** You can schedule a confidential in-person or virtual meeting with a licensed counselor.



## EAP wants to help connect you to the right resources.

Please visit [anthemEAP.com](https://anthemEAP.com) and log in by entering your Company Code. There, you can:

- Look at this month's special features.
- Search by topic.

You can also talk to us directly by calling 800-000-0000.

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**EAP wants to help connect you to the right resources.**

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- Search by topic.

**You can also talk to us directly by calling 855-873-4932.**





## 2023 Training and Wellness Seminars

**You can support your associates with the tools and resources to empower positive change in their lives**



## Introduction

When your associates are struggling personally or professionally, it can affect our company's culture and performance. We are here to provide associates and managers with helpful resources, techniques, and support.

Through seminars and trainings, we hope to make it a little easier to reach out and address health, wellness, and work-life balance issues. These offerings tackle everything from substance use and bullying to retirement planning and communication skills. There are also special leadership-focused topics, like managing change, fostering inclusion, and delegating.

If you have questions about the topics covered in this catalog, or would like to schedule a seminar/training, please contact your client executive.



## Q & A

### **Q: How and when can I schedule a seminar or training?**

A: You can request a seminar or training by contacting your client consultant. We ask for a minimum 15- to 20-day notice to coordinate your event. Let your client consultant know which seminar you want to offer, along with where and when you'd like to have it.

### **Q: How long are the seminars?**

A: Most seminars are 60-minutes long. If more or less time is needed, please discuss with your client consultant.

### **Q: Where are the seminars held?**

A: Seminars can be delivered on-site, via webinar, or both. Please let your client consultant know which format you prefer.

### **Q: Do I need to have any special equipment to hold an on-site seminar or training?**

A: Yes, you will need to have a computer with Microsoft PowerPoint and the technology to project a slide show. Plan to have the presentation loaded and ready to go on the day of your seminar. If you do not have this technology, you can still schedule a seminar — just let your client consultant know.

### **Q: Can these seminars/webinars be recorded for playback at a later time?**

A: Yes, you will need to request the recording prior to your event. Once your event is done, you will receive a link to your recording.

### **Q: How much do the training and wellness seminars cost?**

A: Training and wellness seminars are subtracted from your contracted training bank of hours. After you've used your hours, the seminars are billed at \$250 per hour, per presenter. Feel free to contact your client consultant for information about your training bank balance.

### **Q: Can we cancel a seminar?**

A: Yes, but we ask for a 72-hour cancellation notice for all on-site and webinar seminars. Failure to give notice may result in a cancellation fee or deduction of the seminar hours from your available bank of hours.

### **Q: What happens once the seminar is scheduled?**

A: Your client consultant will send you a confirmation, presentation materials, and an evaluation QR code prior to your scheduled event.

### **Q: Will I speak with the facilitator before the seminar?**

A: Yes, your seminar facilitator will contact you before the seminar date to introduce them self and discuss any outstanding details. Be sure to tell the facilitator about your culture, the work your employees do, and your goals for the seminar.

### **Q: Do you have a minimum attendance requirement?**

A: No, but we prefer five or more employees.

### **Q: How do I obtain the results of the training evaluations?**

A: Contact your client consult to request the results. These are made available upon request only.

### **Q: What's the best way I can ensure a successful training?**

A: Here are a few steps to help make sure it's a success:

1. Select a topic of interest to your employees.
2. Schedule the event well in advance.
3. Promote your event widely and often.
4. Send a reminder message to your employees.
5. Distribute seminar materials.

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## COMMUNITY

### COMMUNITY AND GIVING BACK: LEAVING OUR FOOTPRINTS

Fewer things in life give us more joy than helping others. It is a feeling that provides us with purpose and meaning. But the journey to finding and taking part in service can be daunting and intimidating. Sometimes it's easier to find reasons not to do anything than to do something at all. In this training you will learn the mental and physical benefits of service along with tips on how to overcome your fears to help you find purpose and get involved.

### CULTURAL MYTHS IN MEDIA: FACT OR FICTION

In our culture, pictures have become tools used to introduce planned emotional reactions in the people who see them. This goes for news/media outlets as well. In today's world of blogs and online media, it is important to learn how to be a critical viewer in order to differentiate what is true and what is fallacy. Participants will learn why these myths matter and how they can greatly impact and construct our views.

### DECREASING VIOLENCE ON COLLEGE CAMPUSES

As parents, we want our children to thrive during their college years; to be challenged academically, to enjoy their new surroundings, to make new friends and successfully step into the new, young adult phase of their lives. Understanding the facts about violence on campus, learning how to talk with your young adult about these issues and becoming aware of available resources are important first steps to help protect your children.

### DISASTER PREPAREDNESS

When unexpected events, such as hurricanes, occur we sometimes wait for disaster to strike, and in many cases, we have no warning. In all situations, basic knowledge and preparation is the key to survival and recovery. We will talk about people and pets, as well as how you can prepare everything from documents to home protection and what you need to have ready to go so you can prepare with your family.

### HOW SAFE ARE YOU?

We live in a world where personal safety is an issue that cannot be ignored. This class covers basic steps we can all take to be safer in our surroundings, including best practices and options for making yourself safer as well as changes we can make in our personal behavior to reduce the risk of becoming a victim.

### POWER OF VOLUNTEERING

This class explores why volunteering benefits both individuals and organizations. Physical, intellectual, and emotional benefits of volunteering are discussed in depth. Participants will gain a deeper understanding of both the personal and professional benefits of volunteering.

### POLITICAL ANXIETY

By now, nearly all of us have encountered those uncomfortable situations where friends, or even family members, have engaged in a heated political conversation. Our culture has become so divisive lately that many folks are afraid to join their family for the holidays, even virtually, for fear of inadvertently sparking a confrontation over politics. Regardless of our political affiliation, there are ways to avoid this stress. This course offers strategies to acknowledge our anxieties by addressing the areas of our lives that we can control and engage with each other in a respectful way that mitigates political anxiety.

### THE TRUTH ABOUT HATE CRIMES

Learning about the history and the definition of the term 'hate crimes' is critical to our understanding of what is happening in our world. In this course, we will discuss the rise of hate crimes against specific communities, such as Asian-Americans, along with ways to get involved and support those who are disproportionately affected.

### WHAT YOU NEED TO KNOW ABOUT DEMONSTRATIONS

Learning about the history and the definition of the term 'hate crimes' is critical to our understanding of what is happening in our world. In this course, we will discuss the rise of hate crimes against specific communities, such as Asian-Americans, along with ways to get involved and support those who are disproportionately affected.

## FAMILY & FRIENDS

### BECOMING A PET PARENT

Have you been considering pet adoption? This seminar offers valuable information to prospective pet parents, with topics ranging from selecting the right type of pet for your family, to expenses associated with pet care and the differences between pet stores and animal shelters. Attendees will also be provided with many topics for further research, to aid in their pet adoption journey.

### BEST PRACTICES FOR SUPPORTING OTHERS

This seminar will allow participants to discuss the basic techniques for providing help and support to others. Participants will learn how they can provide support without taking on the role of a counselor/therapist and leave with real life strategies they can use to help listen and support their loved ones.

### CAREGIVING

Nearly one out of three Americans is currently providing care for a family member. This class will cover the issues of self-care, how to assess your family's needs and how to maintain balance within your life. We will also discuss common emotions caregivers may experience as well as special situations caregivers may face.

### CHILDREN AND DIVORCE

This class will discuss many issues that can occur for children during a divorce. Topics will include how to break the news to your children, how you can reassure them and help them cope with issues of self-blame. We will look at the basic needs of children during this time, including how you can help your children effectively communicate and achieve continuity, while living in multiple homes.

### CHILDREN AND STRESS

Stress impacts children as young as seven years old, which can stop them from having a happier and more balanced childhood. This workshop outlines the causes, signs and red flags of stress among children and when parents should seek additional guidance. We will discuss the symptoms of stress in children along with techniques that will help children on an everyday basis.

### COMPASSION

This workshop is geared to teach younger children, ages four to eight, about the importance of being kind to each other. Children will brainstorm ways to "fill their bucket" with good deeds and kind actions towards their friends.

### DEALING WITH CHANGE FOR FAMILIES

Change is inevitable in life; however, for some, changes can be harder to adapt to than for others. This seminar will equip participants with the tools they will need to successfully navigate change together as a family. In this seminar, we will discuss what big or small changes are going on in participants' lives and address what is needed to work through these changes as a family. Children, partners, spouses and friends will all be addressed in this seminar.

### DON'T FORGET YOUR SOCIAL LIFE!

Are you working your life away six days a week, or 12 hours a day? Don't forget that it's important from time-to-time to close that mental office door, kick back for some leisure and fun and remember that stress reduction activities are an essential part of life. Make time for your favorite hobbies, as well as the people who are important to you. This seminar is all about balancing your job with your social life.

### ELDER CARE

It's not uncommon for one family member to be the sole caregiver for an older relative. This seminar will teach participants how to create a family approach to caregiving. We will discuss how family dynamics and family history affect a family's ability to work together as caregivers. Participants will learn strategies for problem-solving and managing conflicts with siblings and other family members.

## **FAMILY & FRIEND GUIDE TO PTS**

We hear a lot about Post Traumatic Stress (PTS), but it can often be confusing for family and friends to support their loved ones who live with it every day. This training addresses what PTS is, in plain language, and how it can develop. Even more important, this seminar will cover how we can support our loved ones who are dealing with PTS symptoms and the sometimes-frustrating situations it can create.

## **FATHERHOOD: A DAY IN THE LIFE**

This journey we call life has plenty of plot twists along the way. Becoming a father is toward the top of this great story. You are your son's first superhero and your daughter's first love. In this seminar, we will talk about how to prepare for the changes, balance your priorities and establish a routine.

## **FRIENDS AND FAMILY: OUR FOUNDATION IN LIFE**

Family and Friends are the bedrock of a happy life. They are our most important relationships that highlight good times and support through our most difficult experiences. During this training, you will learn the benefits of having friends and family (both from a mental and physical health perspective), how to deal with familial issues, and how to rekindle relationships in a post pandemic world.

## **GRIEF, DYING AND DEATH**

This is meant to be a thoughtful and compassionate seminar that helps people talk and deal with a topic that's not often discussed. For many of us, this can be a very confusing time in our lives when we lose someone close to us and we don't have a lot of experience with it. This is a session where people can share, explore and educate themselves on ways of coping with their grief.

## **HANDLING A FAMILY CRISIS**

For those who may be going through a family crisis or simply want to prepare, this class will cover how to manage expectations and guilt. Learn how to cope with financial challenges and what to expect during transition times. This class can also be geared toward managers supporting employees going through a family crisis.

## **HELPING OUR CHILDREN ACHIEVE THEIR DREAMS**

During this seminar, participants will gain the knowledge to help empower our children with the tools to turn their dreams into realities. We will focus on the importance of fostering a supportive and non-judgmental environment. This presentation will aid parents in the transition to becoming their child's coach, to help them achieve their dreams.

## **HELPING TROUBLED TEENS**

This seminar will cover the facts of what it is like for a teen to live with a mental illness. We will discuss signs and symptoms, when a parent should be worried and how to get help. We will introduce what an addiction is and give suggestions on what you can do as a parent, to help your child.

## **HOLIDAY SURVIVAL GUIDE**

We all have special feelings about the holidays. For many, it's a wonderful time for celebration, family gatherings and joyful memories. For others, it's a time of sadness and, possibly, a feeling of being overwhelmed. In this seminar, participants examine sources of holiday stress and learn strategies for coping and managing their emotions, time, relationships and finances. Participants will also share ideas for organizing holiday tasks, managing holiday demands and look at the role of holiday traditions.

## **IS HIGH SCHOOL ENOUGH? THE NEW AGE**

Today, most Americans believe that a college education has taken on the position that a high school education once had; a college degree is now a necessary ingredient for a good job and a way to live a comfortable lifestyle. In this seminar, we will go over the important life skills and responsibilities one gains in college, along with how to decide if the expense is worth it. Do you have a plan for your child or children? We will also go over goal setting at an early age, and how to create a plan for your child.

## **KEEPING YOUR AGING LOVED ONES SAFE**

We all want to be safe and enjoy our life to the fullest extend as we age. For that to happen, both caregivers and seniors need to be well-informed on basic safety procedures. This seminar will introduce six areas of safety procedures, with resources and tips that seniors and caregivers can use to stay as safe as possible throughout the years. (This program is available in two parts with each covering three areas, or as one combined presentation.)

## **KINDNESS**

The goal of this seminar is to equip participants with the self-reflective tools needed to define kindness in their own lives. In today's world, kindness is more important than ever before, as we struggle together to adjust and adapt to an ever-changing idea of 'normal'. We will acknowledge why empathy and emotional intelligence are essential traits for everyone, and how kindness - an act of doing good deeds towards others - is needed in the workplace and at home with our friends, families and in our communities.

## **MANAGING FEAR AND ANXIETY IN CHILDREN**

During this presentation, we will discuss some important tactics to help children, throughout all age groups, deal with anxiety and fear. Parents will learn that our own fears and anxieties must be managed in order to provide proper support to our children. After completing this training, participants will be able to help their children cope with their anxieties through compassion, structure, and flexibility.

## **NAVIGATING DECISIONS AS A FAMILY**

Sometimes there is no choice. Sometimes decisions are made quickly, and we need to learn the tools to communicate these choices effectively to our children and families. In this seminar, we will address the questions you may have about family decisions and how to navigate them with as little stress as possible. We will address different decisions you may be facing; concerns you may have and how your decisions will affect the entire family. People may be at different places, but the process should be about the same. This seminar will provide you with the tools you will need to navigate decisions as a family.

## **RAISING DIVERSITY IN YOUR HOME**

This is an opportunity for all parents/caregivers to learn how to effectively communicate on the diversities in the world today. We all come in different shapes and sizes, and we have different backgrounds, beliefs and abilities, which reflect on where we come from. You will learn how to talk about dealing with stereotypes and how to set a positive example for your kids.

## **RELATIONSHIPS**

The definition of a good relationship is personal, but in many cases, it is shaped by a supportive partnership that fosters growth by each of the individuals. This class will include interactive and lively discussions on the misconceptions of relationships, the meaning of fulfillment, the importance of communication and the real definition of happiness.

## **SCREEN GUIDE**

In today's digital world, many parents are conflicted on when and how often to let their children use their screens. We will discuss age limits and recommend some of the apps/websites that have been approved, so parents can safely set limits. Setting limits often brings many challenges and we will delve into how to tell our children why guidelines are necessary.

## **STEPFAMILIES**

We all come in different shapes and sizes, and we have different backgrounds, beliefs and abilities depending, in part, on the style of family we come from. Whether we're from adoptive families to single-parent households, blended families, families with stay-at-home fathers and same-sex households, the care and support family members offer to one another is essential to the adequate functioning and development of children in today's society. In this session, we will discuss discipline, family values and how to have fun, regardless of your family composition!

## **SURVIVING AND THRIVING THROUGH DIVORCE**

This seminar provides helpful and practical information for those experiencing all stages of a divorce or separation, including an overview of the divorce process, litigation versus mediation, coping skills and tips on surviving the emotional toll of separation or divorce.

## **TEEN SUICIDE PREVENTION**

13 Reasons Why was a 2017 Netflix series that was based on the book by Jay Asher. The series was popular but raised major concerns from the mental health community around the topic of suicide. To some, the series portrayed suicide in an irresponsible and dangerous manner. To others, it showed suicide as a romanticized notion of "speaking from the grave," to incite blame and revenge. In this session, we will discuss these issues and more.

## **THE SANDWICH GENERATION**

Most employees today will face having to take care of an elderly relative while they are still taking care of their own families. This is known as the "Sandwich Generation". This class will discuss how to collect information, communicate with family members and be proactive about planning for the care of your aging parents/relatives.

## **TODAY'S FAMILY: CHALLENGES AND CHANGES**

Whether you have a traditional family or a single-parent household, all families face many of the same challenges. Parenting is still one of the toughest jobs we have. This class looks at the history of families and offers some best practices for how to keep the dynamic healthy, including some fun things families can do together. This class is meant to be discussion based.

## **TOO MUCH GAMING**

Gaming Addiction is a newly named disorder that can affect your life the same as a substance addiction. In this program, we will discuss the difference between playing games and having an addiction to games and learning how to spot the disorder. Treatment options will also be discussed so those affected are able to get the help they need.

# **FINANCIAL**

## **401(K) SAVINGS FUNDAMENTALS**

The goal of this class is to provide you with a fundamental understanding of retirement savings and why it is so important to start saving now. Learning how to invest in 401(k) savings plans will not be such a daunting problem once you learn the fundamentals. By starting early in a plan, you will have the advantages of building up wealth accumulation for retirement. Finally, we will provide you with information on resources to support your investment planning.

## **ADJUSTABLE-RATE MORTGAGES**

Adjustable-Rate Mortgages supply distinctive advantages and risks for homebuyers. This seminar will examine a variety of adjustable-rate mortgages available to help homebuyers make educated decisions about their home financing.

## **ADVANCE DIRECTIVES**

There are so many issues in life that you can't prepare for, but advance directives, just as the name implies, helps you plan for directives that you want done in the future. This class will define advance directives and show their benefits. Participants will learn about living wills and durable powers of attorney for health care. We will also provide strategies for communicating with older relatives about the need for advance directives as well as resources that can help you complete them..

## **ADVANCED TOOLS AND TECHNIQUES FOR THE FULLY FUNDED 401(K)**

This class will introduce participants on how to best manipulate their current 401(k) holdings to reduce future taxes, expand their legacy to family, and coordinate IRAs with these 401(k) tools. We will discuss tax advantages (i.e., NUA technique), stock options in company plans, applicability of a Roth IRA when deciding on income sources, the opportunity of 'in service' withdrawals, and more deductible investment tools to manage risk as you get older.

## **BASIC BANKING AND BANKING TIPS**

Learn the different aspects of banking, banking products, services and procedures, and their effect on managing your money. In this class, we will understand the role a bank has in the creation of money supply, the importance of keeping a healthy cost- to- income ratio and the basic concepts of accounting, such as assets, liabilities, debits and credits. Participants will also learn to balance multiple accounts and understand the difference between mutual funds and CDs.

## **BUILDING GOOD CREDIT AND IMPROVING YOUR CREDIT SCORE**

Your credit score is important. In this seminar, we will motivate and reassure participants with low credit scores that there are ways to make it better. We will explain how the FICO system works, what you should and should not do, and how you can improve your credit score.

## **DOCUMENTS FOR LIFE**

It is often difficult to discuss the future with aging parents and other older relatives. This seminar will guide you through the important discussions to have with your aging relatives including managing and documenting their financial and healthcare plans and preferences. We will cover the documentation that you should consider putting in place, including advance directives, beneficiary forms, wills and trusts.

## **ELDERCARE - FINANCIAL PLANNING**

Many of us help our older relatives with their finances and this seminar will guide you through that process. This seminar will give you an opportunity to create a budget to cover the basics of social security, Medicare, while respecting the wants and needs of your loved ones. You will also learn some warning signs that your loved ones may need extra help, as well as scams and pitfalls to be aware of, that have affected seniors.

## **ESTATE PLANNING**

This seminar does not offer legal advice but does explain the documentation needed for estate planning. You will learn the terms for will-planning, guardianships and trusts, and review the pros and cons of various options.

## **ESTATE PLANNING - RAMIFICATIONS OF YOUR EMPLOYEE BENEFITS PACKAGE**

This class will help older employees understand how the benefits they earned during their employment years will affect their lives to come. Conversations will include group life insurance, pensions, long-term care, deferred compensation, income with respect to a decedent (IRD), and even frequent flyer miles. All of these have tax and planning ramifications post-employment for employees and their families. Lost opportunities such as net unrealized appreciation (NUA) to lower taxes on company stock, use of trusts, the differences of IRA and 401(k) as well as other qualified plans at death or disability, will also be addressed.

## **FINANCIAL FITNESS**

Even smart people with good jobs and high-paying compensation can find themselves in financial problems. Cash flow and debt issues can be a daily distraction and make for 'bad' corporate and personal behavior. This course will address the personal impact of financial inaction, the effect on family, and some of the simple and small steps necessary to initiate significant change.

## **FINANCIAL PLANNING FOR HIGHER EDUCATION**

College is expensive and figuring out a way to afford it can be overwhelming. In this session, we will make it easier for you to predict the challenges and prepare for the funding of college. Participants will learn about a variety of options to help cover the cost of college, including 529 savings plans, loans, scholarships and different types of financial aid. We will also cover things to consider when selecting a college.

## **FINANCIAL WELLNESS AND MOVING FORWARD**

As more time passes, we reflect on what we experienced in the year 2020 and use it to move forward in a positive direction. In this course, participants will explore the positive steps everyone can take to better their finances, health and interpersonal relationships and how these three areas are interrelated. In doing this, participants will understand how to improve their situation both this year and beyond, through the applications of best practices.

## **HANDLING FINANCIAL STRESS**

A significant subset of Americans is living paycheck to paycheck right now, including many with six-figure incomes. Are you one of them? What can you do about it? This course focuses on concrete ways to stabilize and support your income, control your spending and plan for emergencies.

## **HOLIDAY BUDGETING**

We may have our finances under control during the year, but holidays can seriously send spending out of control. This class will help you avoid waking up on January 2 thinking, "how could I have spent and eaten that much!?" This motivational class teaches a skill set to keep the holidays in balance, financially.

## **HOME BUYING: THE BEST INVESTMENT**

In today's economy, there are few investments that offer as good of a return than a home. In this seminar, we will explain the process of buying a home and the preparation that's necessary for such a major, long-term investment. We will cover terminology and provide you with resources so you can make informed decisions when buying a home.

## **IDENTITY THEFT PROTECTION AND SELF-HELP**

Identity theft has become an unpleasant fact for many Americans. This class reviews how it occurs, how it can be prevented, as well as how to recognize some of the red flags. A checklist and resources to prevent, protect and recover are provided to participants, including actionable steps to take if it happens to you.

## **IMPORTANCE OF HAVING A WILL**

You work hard for your money, and you should make sure that it, and your other assets, end up where you want after your death. There is much confusion about what you need to do to preserve your wealth and intentions, and in this class, participants will leave understanding the components and alternatives to their choices.

## **INVESTMENT BASICS**

This class will help participants understand the difference between saving and investing. We will discuss how to identify your investment goals, learn how to create a mix of investments, learn key points to investing and develop a plan to get you started.

## **LIVING OFF YOUR PAYCHECK**

This seminar supplies common sense, no-nonsense advice for making ends meet as well as reviewing goal setting and how your money beliefs can affect the way you save and spend. We will discuss how to reduce debt, learn the difference between "meat and gravy" and consider how to increase your wealth.

## **MANAGING A BUDGET FOR THE FIRST TIME**

Your first big job comes with your first big paycheck, but it also comes with the tough questions about what you're going to use this hard-earned cash for. Taking time to devise a plan can be a critical part of the process. This class will help you to create a good budgeting plan by analyzing your income and expenses.

## **MANAGING YOUR MONEY IN TOUGH TIMES**

For years, we have heard that if you follow sound financial practices and stick to a plan with a solid foundation, you will come out ahead. Financial times today have changed not only the rules, but also, how we need to react. In this session, we will give you new ways to think and new actions to implement to not only help you survive tough financial times, but actually come out even, or potentially ahead.

## **MIND OVER MONEY**

This class examines your personal history with money and how money effects emotions. This includes healthy vs. unhealthy attitudes and best practices in dealing with money decisions.

## **MONEY ATTITUDES**

This class takes a deeper dive into the newer field of Financial Psychology and Financial Therapy. The topics covered include: money scripts, mindset vs. skillset, financial beliefs, and the partner/spouse dynamic, with tips to overcoming each.

## **MONEY BASICS**

In this class, we will discuss spending and saving money. Information will include various types of credit, like secured and unsecured cards, as well as information on credit scores, their importance and how to manage bill paying.

## **PERSONAL FINANCE BOOT CAMP**

This comprehensive three-hour program (which can be offered in three, one-hour sessions) puts all the pieces of the financial puzzle together in terms anyone can understand. It gives participants the knowledge and tools to move forward to relieve financial stressors created by lack of knowledge and confusion. With tools in hand, participants will leave with their own priorities on personal finances to make smart decisions throughout their lifetime.

## **PLANNING A FINANCIAL FUTURE**

Preparing for the future means being financially savvy in wealth, savings, investments, and even in times of emergencies. Yet too many of us are not saving like we should. In this class, we will talk about some typical roadblocks to saving and how we can deal with them.

## **SOCIAL SECURITY RETIREMENT PLANNING**

There are many aspects to social security that employees should be made aware of well before retirement age. Due to deadlines for applying, planning and understanding how these benefits work is very important. This class reviews what people need to know and when they need to act so that they can include social security retirement in their financial plan.

## TAKE CONTROL OF YOUR FINANCES

For many individuals and families, dealing with finances can be challenging. If you get to the end of the month and feel like money has control over every aspect of your life, then this session is for you. You will learn the basic skills to be able to take control of your finances. You will also learn how to communicate about your finances and develop a plan to achieve your financial goals.

## TAX TIPS

This class will help you understand the secrets of reducing your taxable income, how to break down the federal tax reporting system and how to remove the mystery behind the ever-elusive tax return. You discover simple changes to make about deductions and exemptions and learn the four tax-saving strategies to help reduce your taxable income.

## TEACHING OUR CHILDREN ABOUT MONEY

Surveys repeatedly show that many teenagers do not understand even basic financial concepts. This class will review how we look at and communicate our money values so we can effectively instruct our children. We will discuss parental attitudes toward allowances and working, as well as how to set goals and create spending and saving strategies.

# HEALTHY LIVING

## A BALANCED RETIREMENT LIFE

The goal of this seminar is to help people ask the right questions so that they can make the best decisions for their retirement. We will cover the issues to consider for future planning and help you evaluate your current road map. Our goal is to focus on the positive aspects of retirement - not just the challenges.

## ADDICTION

This seminar will cover it all, including what defines an addiction, how does someone become addicted and what are the signs of addiction that we need to look for? If you or someone in your life is dealing with addiction, this seminar will help you understand the symptoms, components, and even the myths surrounding the disease. It will also end with tips and steps on the recovery process.

## ADVANCED EXERCISE

This course explores different types of higher-level fitness and the benefits of specialized training. Understand how to train for different events and learn tips on nutrition and recovery for maintaining peak performance.

## ALCOHOL AND SUBSTANCE ABUSE

This class will address the basics of alcohol and substance abuse. We will look at how to identify if someone has a problem, the difference between substance abuse and dependence, how drugs affect the body, along with common family and social problems that arise from substance abuse and how to get help.

## ALL YOU NEED TO KNOW ABOUT CHOLESTEROL

In this program, participants will explore the complex role of cholesterol. They'll examine the role it plays in nutrition and health and learn about the numbers that indicate good cholesterol levels. There will be an opportunity to discuss the various types of fats that contribute to good and bad cholesterol numbers. Additionally, diet suggestions will be offered.

## ALTERNATIVE MEDICINE: FACT OR FICTION

Learn the basics of the most commonly used alternative healing arts, including chiropractic, homeopathy, herbal and Chinese medicines, naturopathy, acupuncture and therapeutic massage. See how these healing modalities can contribute to and enhance your overall health and wellness.

## ALZHEIMER'S AND DEMENTIA

This is not a medical class about what Alzheimer's is - it's a seminar about lifestyle and caring for those living with Alzheimer's. You will learn that it is possible to prevent Alzheimer's symptoms by living a brain-healthy lifestyle. We will talk through and suggest the steps you can take to slow down, or possibly reverse, the process of deterioration that the disease can have.

## **AUTISM OVERVIEW**

Autism is an issue that affects many families. This class is designed to provide an overview of the autism spectrum, how to identify potential signs and provide guidance on how to cope with the challenges of raising an autistic child. There is opportunity for discussion and a review of resources to get help and support.

## **BE POSITIVE**

Although not everyone believes in the power of positive thinking, it is a field that has been used by countries around the world for centuries. Today, scientists understand why the attitudinal approach - positive versus negative energy, dramatically affects us, as well as our relationships with others. In this class, we will discuss our ability to benefit from the power of positive thinking by making changes to our thought process and perspective.

## **BICYCLE SAFETY**

This seminar will provide you all the information you need from bike maintenance to road safety, so that you can enjoy the ride!

## **BODY IMAGE**

Do you ever catch yourself looking in the mirror and become judgmental, self-critical or ashamed? Unfortunately, we are probably all guilty of it from time to time, but if your body image is something you find yourself struggling with on a daily basis, this seminar can help. We will guide you through tips and tools to overcome your image issues and help you love your body exactly the way you are!

## **BREAST CANCER AWARENESS**

The purpose of this seminar is to educate and empower participants about breast cancer. (Breast self-exam demonstrations can be added). This seminar is for informational purposes only. It is not intended to give medical advice, diagnose or make treatment recommendations.

## **CAFETERIA SHOPPING**

For many people, trying to eat healthy during the workday seems unachievable. This workshop will lead you through the typical cafeteria choices to help you create a personal "shopping list" of foods for better health.

## **CLEAN LIVING**

Clean living is all about cleaning out the toxins in your life. This is a mind/body approach to living a clean and healthy lifestyle. We will discuss what adds toxins to your mind and body and how to eliminate them for good. Some aspects of this seminar will discuss how we can establish a healthier way of eating through whole, real, nutrient-rich food. We'll also look at how eliminating processed food, which is a normal part of most people's diets, can help support a clean-living lifestyle. We will discuss toxic products we use in the home, vitamins and supplements and many more areas during this seminar.

## **COLORECTAL CANCER SCREENING**

To beat colorectal cancer, it is paramount that the disease is detected as early as possible, which is why colon cancer screening is so important. This presentation discusses symptoms, tests, treatments, and prevention.

## **COMPASSION FATIGUE**

For many of us, our day-to-day jobs are not only physically exhausting, but also mentally exhausting. The class will guide you through what compassion fatigue is, the signs and symptoms and real-life strategies to combat the exhaustion in our everyday lives.

## **DEALING WITH MENTAL HEALTH ISSUES**

Mental illness can affect your life and those around you. Whether it is a friend or loved one dealing with mental illness, there are things you can do to help clear a path for better living.

## **DEALING WITH SERIOUS SLEEP ISSUES**

Do you have difficulty sleeping? Check out this program where you'll explore sleep disorders and their causes (circadian rhythms, insomnia and snoring/sleep apnea), discuss the benefits of sleep studies and examine sleep's relationship to stress and the release of cortisol. Additionally, you'll identify ways to address insomnia and leave with helpful resources.

## **DEBUNKING MYTHS OF THE FITNESS INDUSTRY**

The saturation of the fitness industry has caused an immense flooding of misinformation. This seminar is designed to point out some vastly accepted myths of the fitness industry and supply the right information to participants.

## **DEPRESSION**

Depression occurs in persons of all genders, ages and backgrounds. It's among the leading causes of disability worldwide and affects over 120 million people. In this seminar, we will discuss the causes, symptoms and impact of depression, as well as ways to both seek and receive help. Though depression can be reliably diagnosed, few of those affected actually receive the proper treatment. We will learn the barriers to treatment as well as ways to overcome them for a happier, healthier life.

## **DIABETES**

What is diabetes? This class will answer all of your questions. During this seminar, we will discuss the causes, signs and symptoms of diabetes and look into the differences between the various types of diabetes. By the end of this seminar, we aim to help participants be aware of the lifestyle and nutrition changes they need to make, to manage living easier, with diabetes.

## **EATING DISORDERS**

What is an eating disorder? What are the different types of eating disorders? What are the things to look for in someone that may have an eating disorder? These questions and many more will be addressed during this presentation. The facilitator will explain how eating disorders affect work and home life, as well as resources and next steps to get help for yourself or for others.

## **EATING FOR HIGH ENERGY**

Looking at how food can actually make you feel more energized is the focus of this class. We will discuss blood sugar levels, exercise, and best foods to fuel your mind and body!

## **EATING RIGHT FOR LIFE**

Donuts for breakfast, candy bar for lunch? Eating on the run? Does this sound familiar? Participants in this seminar learn the benefits of nutrition, including the importance of making informed food choices to develop and maintain sound eating habits.

## **EATING RIGHT ON THE RUN AND ON A BUDGET**

We all make excuses for eating "junk or "fast" food. This seminar will cover realistic strategies that will allow us to eat well without breaking the bank. There are many options and knowing the truth empowers us to make the right choices for our health, and even our wealth. Learn the basics of eating healthy within your financial means, including when to select organic foods.

## **EMBRACING HAPPINESS**

We have so many things at our disposal but are we really happy? This seminar focuses on what it means to be happy and gives insight into what we need personally to live a happy, more satisfying life.

## **EMOTIONAL EATING**

Are you an emotional eater? This program will define what that is and reasons for it. Participants can explore their own personal food history and examine the relationship between mood and cravings. They'll also look at questions to heighten awareness of choices and determine their own eating behavior. For those who want to move out of emotional eating, there are steps, best practices and resources.

## **EXERCISE AS YOU AGE**

As the body gets older, understanding the changes in the mechanics of the body is important to decide what kinds of exercise are best for overall health. In this seminar, we will journey through some common methods for injury and illness prevention and treatment, through fitness and wellness.

## **EXERCISE BASICS**

Can't seem to find the time to fit exercise into your daily schedule? This workshop looks at the benefits of fitness and exercise. Strategies to incorporate exercise into your busy lifestyle will be discussed. Learn how to enjoy exercise at home, work and when you travel.

## EXERCISE SCIENCE

This course will look at the science behind human movement and how exercise can affect us. What happens before, during, and after your workout is important to understand if you want a healthier life through exercise, rehabilitation, and nutrition.

## FEAR AND ANXIETY: MOVING FORWARD

Fears and anxieties can cause us to feel nervous and make it harder for us to live our lives with ease. In this class, we will talk about the similarities and differences between fear and anxiety and how they affect our ability to be productive and live well. We will cover how harnessing our thoughts can be a powerful way to put us on a path toward overcoming our fears and anxieties. We will also cover a variety of coping strategies that can help us to move forward.

## FILLING THE NUTRITIONAL GAPS

In this program, participants will explore snacking, its benefits, and its impact on blood sugar. We will discuss how effective snacking meets the body's need for recommended nutrients and how myplate.gov can be used to determine gaps and which recommend foods will address them. Participants will explore the role of fiber, compare and contrast soluble and insoluble fiber and identify sources of each.

## FORGIVENESS

We all carry around grudges – some large, some small. The consequences of living with these grudges can negatively affect personal relationships, our weight, levels of jealousy towards others and even difficulty achieving success at work. This course follows the art of forgiveness, showing us the lasting effects of harboring grudges, and the power that returns to us when we allow ourselves to "let go" and move on.

## GETTING ORGANIZED

If you need help getting organized, this program is for you. It looks at the downside of being disorganized, helps you determine your own organizational quotient, and explores why we're disorganized. This session also examines the benefits of organization and how to start. It addresses organization issues in both our homes and at work, discusses storage issues, helps you decide if disorganization is a problem and offers resources.

## GETTING YOU HELP

Often times, things in life can get so busy, we forget to check in and see how we are doing. We need to stop from time to time and evaluate our own mental health. Are we anxious all the time, sleeping well at night, overeating or under eating? This class will provide you with the opportunity to remind yourself to run through a mental health check list to evaluate both your emotional and physical wellbeing; ultimately helping participants find the help they might need.

## GRATITUDE

This seminar is about learning the science behind gratitude and how it can help to increase meaningful relationships in all areas of your life. The newest research in this course empowers individuals to learn how to incorporate gratitude both at work and home. This topic is a continuation of increasing awareness of the complicated relationships we have in our lives. When we focus on what we can be grateful for each and every day, it offers a new perspective on our daily life.

## GREEN TIPS FOR THE HOME

This seminar provides an overview of practical actions one can take to reduce our carbon footprint while saving money. In addition to detailing the advantages of using organic and natural products, participants will learn how to increase thermal efficiency and save electricity. The curriculum demystifies many elements of an ecological lifestyle, to start participants on the road to going green in their own lives.

## HEALTH NEWS

The sheer volume of health news available today is overwhelming. The good news is that we have access to a constant flow of information that keeps us informed and allows us to make good decisions about our health and health care. This class will teach you to filter out what you need, know which sources to trust and how to make sure the information you find is accurate and relevant to your health care decisions.

## HEALTHY AGING

There is a new saying that 60 is the new 40. The way our society looks at age is changing, reflecting longer life spans and conditions that have never been experienced before. The manner in which we relate and interact with our surroundings makes a huge difference in our individual perception of the aging experience. In this class, we will discuss age as a state of mind and in relation to our surroundings.

## HEALTHY KIDS

Healthy kids lead to healthy adults. We will discuss the research behind living a healthy life and practicing preventative healthcare for kids, as well as the impact healthy living can have on the minds and bodies of children as they grow. Learn how you can raise a healthy kid with areas of discussion that include nutrition, exercise, immunizations, and sleep needs for children.

## HEALTHY TIPS FOR BUSINESS TRAVEL

Do you love or loathe business travel? Are you somewhere in between? In this program, participants will learn how to prepare things ahead of time, figure out how to avoid unhealthy temptations on the road and explore how to incorporate exercise, sleep and healthy food choices into business travel. We will also examine hazards and best practices.

## HIPAA

You keep hearing about HIPAA, but what is it? This program explains HIPAA, discusses patient rights, examines the Security Rule, identifies protected information, explores when information can be disclosed and addresses compliance mandates.

## HOW TO BOOST YOUR SELF-CONFIDENCE

In order to manage today's extremely challenging situations, we need to believe in ourselves so we can be at our best. This seminar will outline why confidence is so important and how to continue feeling strong and empowered. We will have an interactive, engaging conversation that will help you feel more confident both at work and at home.

## HOW TO SPEAK WITH YOUR PHYSICIAN

This seminar is necessary due to all of the changes happening in healthcare today. Doctors have little time to spend with patients, thus, every minute you spend with a physician truly counts. This seminar is designed to give patients a set of specific tools to optimize visits, including pre-appointment preparation and communication during and after an appointment.

## INCREASING MENTAL TOUGHNESS

The goal of this seminar is to provide participants with the opportunity to reflect on the challenges of the past two years and to recognize opportunities for growth in the face of adversity. We will discuss what it means to be mentally tough, how to find the positive in negative circumstances, manage ambiguity, and react with agility to change. Finally, we will dive into the importance of 'grit', defined by Dr. Angela Duckworth as 'passion and sustained persistence applied toward long-term achievement', which is a much-needed skill for both personal and professional growth in today's world.

## INFLAMMATION, DIET AND DISEASE

In this program, participants will explore inflammation, including chronic inflammation, and learn how it leads to disease. They will also have an opportunity to identify and discuss foods that comprise a pro-inflammatory diet and determine ways to reduce chronic inflammation, by leveraging healthy diet and lifestyle choices.

## LEARNING ABOUT HEADACHES

If you or a family member is a headache sufferer, you know how disruptive they can be to your work and life in general. In this class, we are going to provide you with an overview of headache types, what causes them and helpful ways to prevent and eliminate them.

## LIGHTENING YOUR LIFE WITH LAUGHTER

This informative and enjoyable workshop shares proven techniques for using laughter to reduce stress in your life. The history, practices and beliefs of this therapy as well as how to become more positive, will be explored. This seminar reminds participants about the wonderful energizer called laughter, with its many therapeutic benefits, including looking at life in a way that takes some of the stress out of it.

## LONELINESS

What is loneliness? Are you lonely? How can you overcome loneliness? Loneliness is something that can affect our well-being along with our physical and mental health. All your questions, plus some very practical suggestions and tips for overcoming loneliness, will be discussed during this seminar.

## LOVE

What the world needs now is love! One of the key ingredients to being successful in life is to embrace love in all its complexity. Interestingly, many of us have never embraced the study of love. This class will delve into defining, analyzing, and challenging us to love ourselves, others, and our job in a more holistic way.

## LOVE PART 2 – THE COMPLEXITIES OF LOVE

During Part 2 of this Love series, we will take a deeper dive into the various levels of love. During this seminar we will spend some time analyzing our own relationship with love and discussing what it means to have unconditional love. We will discuss the various relationships in our lives where it is standard to love unconditionally, no matter the circumstances. To wrap up this seminar, we will spend some time creating our own unique plans for love in our lives.

## MANAGING FEAR AND ANXIETY

Fears and anxieties are made up of thoughts that are based upon either personal experiences or beliefs. Pretending that these fears and anxieties do not exist, or are not as bad as they seem, can actually make them worse. In this class, we will learn how to talk through our thoughts to realize that our fears and anxieties are manageable and controllable.

## MAXIMIZING YOUR BRAIN'S POTENTIAL

It is extremely important to make the most of your brainpower for both work and fun. Doing this means taking care of your whole self. In this class, you will learn how everything you do, including learning, affects your brainpower. This program draws on ongoing research in neuroplasticity, the brain's ability to continue to grow.

## MEDICAL/RECREATIONAL MARIJUANA

Since several states have legalized the use of marijuana, we now offer a class to bring some clarity to some of the issues surrounding this change. The information discussed includes facts and guidance from the American Medical Association and includes resources for adults and parents.

## MEN AND DEPRESSION

Men are less likely to suffer from depression than women, but also less likely to seek help. This presentation discusses the various causes and effects of male depression, and why it is much rarer for men to seek professional help. Participants will learn how to recognize signs of depression, how they can help themselves and support others.

## MEN'S HEALTH

In this day and age, it is clear that men have their own set of health issues and are unfortunately, less likely to seek help on their own. This class will emphasize the importance of preventive measures for men's health and discuss everything from sleep issues to cancer screenings and how to find a doctor.

## MENOPAUSE

Even though menopause can be a unique experience for each woman, there are many experiences that are shared. This program will define menopause and contrast it with perimenopause. It will identify what you can expect, examine causes and explore potential complications. It will also look at tests, treatments, and remedies, as well as the importance of partnering with your doctor.

## MENTAL HEALTH

It is important to know that mental health problems are more common than we think, and that you can get better with the right help and treatment. This class focuses on people who need information on mental health and illness and may love or live with someone with mental illness. This includes an overview of mental illness, stats, the facts, stigma, treatment, and resources.

## MINDFUL MEDITATION

In our busy, automatic pilot lives, we may find that we crave opportunities to be mindful. In this program, participants will examine the focus of mindful meditation, define it, explore what it is and isn't, identify its benefits, discuss data that supports mindful meditation and have an opportunity to practice it.

## NAVIGATE LIFE TRANSITIONS

Changes in our personal and professional lives often occur around major life transitions, such as moving, marriage, death and divorce. We all need strategies to make these transitions easier and that is exactly what we will cover in this session.

## NEW YEARS' RESOLUTIONS

Even though this class is meant for January 1 - everyday can be like January 1! This is a fact-filled class about resolutions that, when done properly, can truly change our lives. This seminar offers help, encouragement and guidance. The class is meant to be extremely interactive and participatory.

## **NUTRITION NAVIGATOR**

Looking to plan some healthy meals during your busy week? Looking to have a better understanding of components like nutrition labels, blood sugar levels, and fiber? This seminar is a nutrition navigator that will help you plan healthy meals and introduce some of the nutrition basics, on your journey to a healthier you!

## **OVEREATING VS. BINGE EATING**

Food fuels and prepares us for activities and events, as well as replenishes us after a long day. Eating too much every so often is normal. But people who compulsively overeat may use food as their only way of coping with negative emotions or feelings. As a result, they often feel that their eating is out of control. This leads to feelings of guilt, disgust, and depression. Binge-eating disorder (BED) is a serious disease that isn't always easy to spot in loved ones, family members, and friends. Symptoms, treatments, health concerns, and effects of BED will be discussed in detail. Along with this info, we will talk about what you can do to help yourself or a loved one through counseling, group therapy or alternative means.

## **PATIENT SAFETY**

What do we need to know to be safe? We and our loved ones are all patients of the health care system at one time or another and it is critical for our safety and care that we are well informed. This class will help make patients aware of their rights and remind them of the potential problems that can arise in hospitals or under a physician's care.

## **PROMOTE FAMILY HEALTH**

It is a family's responsibility to take care of each other. We will discuss how people can be empowered with knowledge, to promote healthy living on the home front.

## **PSYCHOLOGY OF EXERCISE**

Going into your workout with the proper mindset can drastically change the results you yield. Practicing mindfulness, breathing techniques, and meditation increase your mental strength so you can tackle your day with optimal energy and focus.

## **PTS: VETERANS & MILITARY SELF-HELP**

During this specific Veteran and Military self-help workshop, we'll explore what's happening, how we're feeling, and most importantly, what we can do about it. Events happening in our community and around the globe may have a direct impact on the feelings, emotions, and thoughts of veterans and those currently serving in the military. What can we do about it?

## **RECLAIMING YOUR HEALTH: THE GUIDE TO RECOVERY**

Many people today are struggling to regain a healthy lifestyle after a life-threatening disease, addiction, or physical and/or mental disability. Learn how to overcome the 'symptom management' mode, gain back energy and be productive.

## **RELAXATION 101**

In this introductory meditation workshop, we will use guided imagery and breathing to learn how relaxation techniques make you even more productive during the day and help you sleep better at night.

## **RELAXATION TO SUIT YOUR LIFESTYLE**

Relaxation is necessary for staying healthy physically and emotionally. This seminar will explore the obstacles to practicing relaxation in our lives and provide practical tips and techniques to fit some relaxation into every person's lifestyle.

## **RESILIENCY - BOUNCE BACK STRONGER**

Resiliency is all about bouncing back and this seminar will teach just that. No matter what life throws at us, we can always learn tips and techniques to help us bounce back and become more resilient no matter what we go through. This seminar will leave participants feeling empowered so that they can become more resilient through the knowledge and steps shared during this class.

## **SELF-CARE IN THE FACE OF ADVERSITY**

This course will provide information on the history of trauma and racism, trauma symptoms, triggers and how to care for yourself while dealing with these issues. Participants will explore the different sources and types of trauma. After attending this seminar, you will have the tools you need to set healthy boundaries in order to maintain optimal self-care.

## **SLEEP BASICS**

In this seminar, you will learn the physical and mental benefits of a good night's sleep, along with how to establish daily habits that promote and improve your sleep environment. We will discuss techniques for relaxation and dealing with insomnia.

## **SMOKING CESSATION**

Quitting nicotine can be a challenge, however when you are equipped with the tools and the knowledge needed, you can successfully quit nicotine for good and start reaping the benefits to your health, almost immediately.

## **STAYING STRONG AND RESILIENT**

Have you recently changed jobs, had a change or loss in your life, or begun caring for an aging relative? How do you handle challenges, problems and hardships in your life? Learn strategies for staying strong and resilient, maintaining a positive outlook and reducing stress in your life.

## **STRESS REDUCTION TOOL BAG**

How do you know you are stressed? Do you recognize the symptoms of stress? Explore the newest research and what experts are saying about good and bad stress.

## **SUN PROTECTION**

We all hear that it's important to wear sunscreen and limit sun exposure, but do we know about the long-term damage the sun can cause? This will be an in-depth seminar that will review and address the dangers of the sun. In this seminar, we will discuss sunburn, sun protection tips, as well as topics related to the summer heat like heat rash and hydration. Participants will leave this class with a true understanding of how to protect themselves from the risks that the sun can cause.

## **TECHNOLOGY AND EXERCISE**

Dive into the rapidly expanding world of technology in the fitness industry and how to benefit from the immense influx of information and innovation. From new types of exercise routines and equipment, to suggested apps and tech wearables - knowing what is available will provide a huge advantage in reaching your exercise goals.

## **THE ART OF FENG SHUI**

The term Feng Shui has grown in popularity, but what is it? This program defines and explains what it is, while exploring the tools used and examining what it does. During the course of this presentation, participants will look at the impact of clutter, the role of color and the five elements associated with Feng Shui. They will also leave with suggested resources to learn more about the concept

## **THE CONNECTION BETWEEN EXERCISE AND MENTAL HEALTH**

Exercise is great for our bodies and our hearts love it too! It boosts our immune system, helps to reduce our risk for contracting many diseases and plain makes us look better. But what can it do for our mental state? Come explore how exercise contributes to a healthy brain, what actually happens to our brain when we exercise and why it is so essential to our mental health.

## **THE EFFECTS OF UNHEALTHY EATING**

The effects of unhealthy eating are a major contributing factor to the onset of several diseases and heart health issues in many cultural groups. This class will teach how cultural differences in eating attitudes and behaviors may influence a person's eating habits and how to move toward a healthier approach to eating.

## **THE FORGOTTEN PIECE OF YOUR WORKOUT ROUTINE: RECOVERY**

In this session we will explain what goes on in the body during the recovery process, why this process is paramount to a healthy body, where to seek out recovery options, and tips on how to- give yourself top-level recovery treatment, from the comfort of your home.

## **THE IMPORTANCE OF UNPLUGGING**

In today's world of remote work, the lines between work and home are more blurred than ever. Technology allows us to be constantly connected. In this session, we will discuss the impact of being connected 24/7 as well as the benefits of unplugging. You will get some tips on how to unplug from work and reconnect to your life.

## THE TRUTH ABOUT DIETING

In this seminar, we will discuss why diets don't work and, more importantly, explain what does. When to eat, what to eat and how much to eat, among other topics, will be covered in this seminar that will leave you with a good idea of how to maintain a healthy weight the right way!

## UNDERSTANDING YOUR IMMUNE SYSTEM

The immune system is complex, intricate and interesting. In this seminar, we will take a look at how your immune system works, so you can understand what it is doing for you each day, as well as the effects that nutrition, exercise, sleep and stress have on your immune system.

## WHAT IS ANGER?

What is anger to you? We all tend to get angry at times. In this seminar, we will do some self-reflecting on our past and present and look at how anger affects us. Knowing exactly what anger is and what it is not, is a big step in helping us learn how to keep it under control. Discussing the best practices to avoid any feelings of anger or resentment can help us live a happier and less stressful life.

## WOMEN AND DEPRESSION

Discover the depth of this illness on women and its effects on your life, both professionally and personally. We will discuss the signs, causes, and ways to cope and get help. Classes for both employees and managers are available on this topic.

## WOMEN'S HEALTH

Women often have an intuition when something is wrong and are more likely to seek out medical help. However, women are not always aware of the risks of heart disease (the number one cause of death for women) or strokes, both of which are silent killers, as well as many cancers. The good news is there are many preventative steps you can take, and this class will cover those as well as the signs, symptoms, and alternative solutions available today.

## WORKDAY WORKOUTS

The goal of this class is to help understand why exercise is vital and how to easily make it a part of your daily life. We will cover why eating nutritiously is just as important as sweating often, and participants will learn some things they can do throughout the workday to stay fit.

## YOGA 101

This class covers a brief history of yoga and provides descriptions that clarify the differences between some of the most popular types of yoga in the United States. There is a version available that is a guided yoga class with a yoga professional.

## YOUR HEALTHY HEART

Paying attention to your heart health is one of the best things you can do to improve your quality of life, longevity, and overall health. In this seminar, we will touch on the various terms and factors you need to know to achieve better heart health.

# PARENTING

## AUTHORITATIVE PARENTING

Authoritative parenting focuses on responsiveness and demands, and as we know, there are times when we need to take control of our children and their lives. This particular style works very well, helping parents keep in-tune with their children. We will discuss communication techniques, appropriate discipline, and listening skills. This class is meant to be very interactive and address real-life scenarios. This class is best suited for parenting children up to 12 years old.

## CO-PARENTING

Parenting is a challenging responsibility, especially for those who are going through a separation or divorce. The good news is, that with planning and understanding, you can parent just as effectively as you did before. In this class, participants will learn the challenges and strategies to co-parent successfully and learn how to focus on what is best for your children.

## COMMUNICATING WITH YOUNG CHILDREN

This class specifically covers how to communicate with young children. We will explore the importance of good communication, what to expect at various stages and what kinds of communication techniques work best with younger children.

## **FIRST-TIME PARENTING**

First time parenting can be exciting, overwhelming and exhausting. Although everyone will have their own individual journey as a first-time parent, this class will help to prepare you for some of the things you can expect. In this class, you will also learn some tips for staying sane, getting sleep, asking for help and many more topics!

## **INTERNET INFORMATION FOR PARENTS**

This class will look at the realities of the Internet as well as the benefits. We will discuss the importance of learning the language of the Internet and how to identify concerns and risks. Participants will learn strategies to increase safety online with instant messaging, social networking and chat rooms.

## **NAVIGATING THE TEEN YEARS**

This seminar will touch on important topics for parents who are, or will soon be, navigating children through their teen years. Participants who attend this seminar will take a critical look at the difference between what is important to them vs. what is important to their teen. During this seminar, you will discuss risky behaviors, how to prevent them and managing conflicts with your teen, as well as the do's and don'ts of parenting a teen. You will leave this seminar with a toolbox of best practices for managing those tricky teen years.

## **PARENTING YOUR TEEN: AT RISK BEHAVIOR**

This session addresses the realities of today: the good news and bad news. We will discuss essential facts of at-risk behavior and give parents the chance to have frank discussions about their fears. Learn what to do, what not to do and what we, as parents, really need to know.

## **PARENTING YOUR TEEN: CAREER AND LIFE GOALS**

This module is designed to help parents discuss career and life goals with their teens by looking at their teen's personal values, interests, and work skills, in a positive way.

## **PARENTING YOUR TEEN: COMMUNICATING**

Feel like you and your teen are speaking different languages? In this seminar, we will discuss how to create a comfortable climate for parent/teen communication, review the basic rules, the do's, the don'ts and the best practices, so you and your teen can be on the same page.

## **PARENTING YOUR TEEN: FINANCES**

Learning about money at a young age is important. As a parent, you can teach your teen about finances by determining how your money values impact your teen. Learn how to teach your children about financial goals and how to develop autonomy with money.

## **PARENTING YOUR TEEN: FRIENDS AND FAMILY**

This class helps parents of teens understand the distinction between teen/family and teen/friend relationships. We will discuss communication breakdowns, rewards and the importance of communication, as well as best practices and advice for families with teens.

## **PARENTING YOUR TEEN: GIVING BACK**

Researchers say that people who offer love, caring and support to others have better mental and physical health. They suffer from less chronic pain, lower levels of depression, and a better overall sense of well-being compared to those who are less altruistic. The goal of this seminar is to help parents foster a sense of giving back in their teens.

## **PARENTING YOUR TEEN: MANAGING CONFLICT AND PROBLEM-SOLVING**

Conflict between parents and teenagers is an unpleasant fact. In this seminar, parents explore ways to help their teenagers resolve conflicts and establish guidelines for acceptable behavior. The goal is for your teen to become a mature young adult who can make good decisions independently, so they can manage their life in appropriate, autonomous ways.

## **PARENTING YOUR TEEN: RELATIONSHIPS**

Adolescence is a time when peer relationships intensify. Teacher and work relationships grow in significance and parental relationships are routinely challenged. This module will define relationships, review best strategies and discuss conflict resolution techniques to share with your teen.

### **PARENTING YOUR TEEN: SIBLING RIVALRY**

Many parents suffer with sibling rivalry in their households. In this seminar, we will discuss how to lessen tensions between children, their rivalry against each other, and even the rivalry they have for their parents' attention, through habits that may encourage rivalry.

### **PARENTING YOUR TEEN: SOCIAL ISSUES**

To understand teen social issues, you must learn what your teen is experiencing and the issues that they face. We will review best practices for tackling issues like alcohol and drugs. You will leave with some important takeaways and resources to deal for your teen.

### **PARENTING YOUR TEEN: SUCCESS IN SCHOOL**

Parents will learn which healthy habits are important to school success, how to help teens deal with teachers and academics and how to encourage teens to get organized. Learn to recognize when your teen is over-involved or under-involved, how to manage discipline and how to help them deal with peer pressure.

### **PARENTING YOUR TEEN: TEENS AND SPORTS**

Teens today are exposed to multiple entertainment avenues that can foster inactivity such as video games, television and other media devices. Participation in organized sports is a great solution, but when can a good thing become too much? In this class, we will discuss the importance of providing our teens with balance and perspective for the activities they choose, especially as obesity rates rise in the U.S.

### **PARENTING YOUR TEEN: TEST ANXIETY**

Test anxiety is a reality for many teens, and it can prevent them from showing their true academic competencies. This seminar will give parents the tools to assess whether their teen has test-side jitters or true test anxiety. Parents will also learn how to help teens manage their anxiety with proactive exercises.

### **PARENTING YOUR TEEN: TIPS FOR PARENTS OF TEENAGE DRIVERS**

In this seminar, we will review statistics on teen driving, learn the major causes of accidents and discuss how to prevent them. We will help parents understand the factors to determine driving readiness as well as proven strategies for parents to manage and guide their teen on this milestone of independence.

### **PARENTING YOUR TEEN: UNDERSTANDING IMPORTANT HEALTH ISSUES**

This candid seminar will help parents understand the physical changes to boys and girls during puberty and how to cope with these changes, while supporting your teen's mental and physical health.

### **PARENTING YOUR TODDLER: COMMUNICATE, MOTIVATE AND BUILD CONFIDENCE**

The toddler stage is the most challenging stage of any child's development. Toddlers are continuously going through developmental milestones. They are experiencing changes to physical coordination and learning how to communicate with complete sentences, all while coping with fast-changing emotions and growth spurts.

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## **PREPARING FOR COLLEGE**

A child going to college is a major family milestone. Household dynamics will never be the same. Preparing your child, his or her siblings, your spouse/partner, as well as yourself for this transition, is the goal of this program. If your child is attending college, you are already in the midst of coping with all the changes. If your child is still in high school, you have a chance to take notes to prepare them and yourself for a productive transition.

## **RESILIENCY FOR THE WORKING PARENT**

Today's working parent needs to build resiliency in order to prevent burnout. This class will give you the tools to manage stress while maintaining a sense of work and family life balance.

## **SINGLE PARENTING**

This workshop offers a discussion on the challenges of raising children on your own. Techniques for caring for your children's needs while still having time for you and your needs, will be covered. We will discuss how to enjoy life even if it has become different than what you had expected.

## **VAPING - WHAT PARENTS NEED TO KNOW**

The use of e-cigarettes and vaping are becoming a crisis. This class will inform parents about the dangers of vaping and how to talk to your children about it.

# **WORK**

## **ASSERTIVE COMMUNICATION**

This class will cover good communication vs. poor communication as well as understanding what assertive communication is. We will review a communication model to determine the purpose, focus and process of assertive communication. Tips and obstacles to good communication will be reviewed.

## **BUILDING A TEAM BRAND**

Teamwork is an important part of continuous improvement. No one knows the job tasks, and goals better than the individual team members. To get real change, you need your team members' knowledge, skills, and abilities to come together to be a successful team. This class includes the 'Marshmallow Challenge' exercise.

## **BULLYING AND VIOLENCE IN THE WORKPLACE**

Workforce environments are experiencing increased bullying and violence. Regardless of the contributing factors (stress due to downsizing, sandwich generation issues and/or financial strains), bullying and violence deteriorates productivity. This class will discuss the warning signs and strategies for both employees and employers to better cope with bullying and violence in the workplace.

## **BUSINESS ETIQUETTE**

Good manners and business etiquette have always been based on common sense and thoughtfulness. Social skills can help us build more productive relationships and project a positive image. This class will include an interactive discussion on the do's and don'ts of business etiquette, including email etiquette.

## **BUSINESS WRITING FOR MANAGERS**

Second only to verbal communication, written communication is a key to being a successful manager. Not only does effective writing help communicate what the manager is trying to say, but it also creates an image for the reader - whether he or she is a client, employee or associate. Learn how to make your writing convey the right message.

## **CALL CENTER STRESS MANAGEMENT**

Working in a call center can be interesting, enjoyable, challenging, and stressful all in one. In today's difficult economy, most of us are feeling additional stress in our lives. For customer service representatives, these stresses can heighten an already high-pressure situation. This seminar will provide information to help you better understand call center stress and offer strategies to help you successfully manage it.

## **CAMPUS TO CAREER: TRANSITIONING INTO THE WORKPLACE**

For most graduates, it can be challenging to make the transition from being a college student to a working professional. Trading the campus life and study sessions for a full-time office job is a big change that not everyone is prepared for. Making sure you stay motivated early on is key when it comes to transitioning into the workplace. "Campus to Career" is a perfect seminar for anyone learning to juggle and accommodate the new lifestyle.

## **CAREER DEVELOPMENT STRATEGIES**

This interactive seminar helps participants build an effective career development plan by taking a strategic look at self-awareness, career options and current job skills. This workshop will help participants identify their true passions, learn how to incorporate those passions into their individual career action plan and develop strategies for implementation.

## **CAREER TRANSITIONS**

Career transitions are inevitable. Facing them because of downsizing, mergers and relocations takes courage and planning. Regardless of the reason, moving forward with a job change can be a satisfying personal journey. This seminar looks at all aspects of job changing, including self-evaluation, networking, and resourcing opportunities. Participants will gain the tools and attitude they need to build a bright, satisfying future.

## **CHANGE MANAGEMENT FOR LEADERS**

This training is designed to familiarize participants with the elements of change. The goal is to help leaders manage the change process and understand the importance of their role in the process. We will provide an overview of each element and define each one as it relates to the leaders' role in change management. Opportunities for sharing examples from your own experience for each of the elements, will be included.

## **COACHING**

Coaching is a one-on-one process that involves a relationship between two people - the coach and an individual. We can all benefit from coaching. You will leave this seminar with the tools and tips you need to be the best coach you can be, so that you can begin working with others to develop their professional skills and goals.

## **COLLABORATIVE COMMUNICATION**

Communication is an important skill to develop, but not many people understand why it is so important to communicate well. This class applies to parents, spouses, partners, colleagues and bosses. It explains why better communication can enhance our lives by teaching us new things. This is an interactive class, in which participants will get to practice the new techniques that are taught.

## **COLLABORATIVE CUSTOMER SERVICE**

The goals and objectives of this seminar are to understand the challenges of delivering great customer service through effective, professional customer service communication. We will discuss stress management related to working in customer service, as well as final comments, action plans and evaluations.

## **COMMUNICATING CHANGE TO EMPLOYEES**

Does your staff dread change? This program will identify the kinds of changes organizations face, describe how to develop a communication plan and explore the importance of being proactive. It will also explain how to communicate change successfully using empathy and active listening skills, anticipate common employee reactions and explore working through the change.

## **COMMUNICATING DURING TIMES OF CHANGE**

We have experienced many more violent attacks in the last ten years. Social media keeps us in the know, every nano-second. When those topics come up at work, it can be an opportunity to share our views, however, we need a new set of tools to prepare us for engaging in conversations with others who have different views. This class will focus on how to look at our thought process and think before talking when controversial topics come up, so that we can reply with tact, while being respectful of others.

## **COMMUNICATING IN A TECH WORLD**

Communicating face-to-face is not always possible in the business world. Today's communication depends on conference calls, texts and email chains that make it challenging to know when each outlet is appropriate. Nowadays, it's vital to use technology to communicate with workers worldwide. This class will show you how to interact professionally in the workplace using technology.

## **COMMUNICATION FOR MANAGERS**

Communication is perhaps the most important skill a manager must learn and work to improve in order to be effective. From the 'One-Minute-Manager' concept to continuous feedback, there are many ways to be an effective communicator. In this class, we will learn and practice the various skills that are needed to communicate as a manager.

## **COMMUNICATION SKILLS FOR THE WORKPLACE**

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## **COMMUTING**

This class covers all aspects of commuting, including ticket purchasing, tips on traveling to and from the station, and making the most of your commuting time. We will cover how to find balance and what family adjustments might be necessary as well as the emotional side of commuting.

## **COMPASSIONATE LEADERSHIP**

This training will give participants an in-depth look at how to lead with compassion. Attendees will learn the positive impact created by empathizing with the work force. This course will illustrate how genuinely caring for people leads to better feedback, professional development, and increased productivity.

## **COMPONENTS FOR GREAT COMMUNICATION**

Great communication starts with you and this class will equip you with the tools and skills of being a great communicator. The seminar will discuss the importance of first impressions, various communication styles as well as giving feedback. This is a step-by-step class for making your communication with others easy and effective, so you can be at your best at work and in everyday life. Remember, success in life all starts with you and how you communicate with others!

## **CONCENTRATION**

Have you ever driven to work but not remembered the trip? If so, then you can benefit from learning about the importance of concentration and how to improve it.

## **CONFLICT MANAGEMENT FOR EMPLOYEES**

This class will allow participants to understand and dissect their role in conflict, which is the first step to conflict management. This is a journey to assess and learn what you can do differently, to "play in the sandbox" productively with a wide variety of people.

## **CONFLICT MANAGEMENT FOR MANAGERS**

About 60-80% of all workplace conflicts come from strained relationships between employees and managers. Learn the skill of resolving conflict in the most amicable way, benefiting individual and team productivity.

## **CREATING A GREAT PLACE TO WORK IN TEN EASY STEPS**

This seminar will teach participants a vision of the ten steps needed to create a great place to work, because who doesn't want to come to work every day and love where they are and what they do? Participants will come out of this class with a clear vision of not only what a healthy work environment looks like but also how to create it in their workplace. This will be a step-by-step process. To make it work, an investment must be made by each and every person.

## **CREATING POSITIVE WORK ENVIRONMENTS**

Topics covered in this seminar will be building trust, creating positive communication, setting expectations and needs, creative ideas for recognition and rewards, building teamwork, finding meaning in your work, and accepting responsibility and humor in the workplace. All of these areas help foster a positive work environment.

## **CREATIVE PROBLEM-SOLVING AND DECISION MAKING**

Every problem has a solution. In this program we will explore some techniques to help us get to the solution sooner rather than later. This interactive class begins by asking for a list of problems that the attendees are currently working on, so they can see real life benefits of using these techniques.

## **CRITICAL THINKING**

Beyond just memorizing facts or learning from rote, learning to think critically expands a person's ability to problem-solve and see things in a new way. By learning how to ask different kinds of questions, we open the floodgates to different ways of viewing concepts. This class will take a look at the origins of critical thinking concepts as well as applications of them in our work and private lives.

## **CROSS-CULTURAL SENSITIVITY IN THE WORKPLACE**

As we work towards more dynamic and inclusive workplaces, we must consider cross-cultural sensitivity in the workplace. This in-depth course touches on unconscious biases and aggressions that we may commit or experience in the workforce, while also presenting solutions to help avoid these situations in the first place. We will also discuss why it is important to foster inclusion and how to combat aggressions when we see them.

## **CURIOSITY**

In today's times, we need to look at what we are curious about and why. Curiosity drives motivation and often encourages us to take our careers and lives to new levels.

## **CUSTOMER EXPECTATIONS**

There is a perceived expectation that every customer has when going into a business relationship. To manage expectations, you must first start by understanding what the client's expectations are. You must learn how to manage your promises and how to measure satisfaction. Delivering on expectations means excellent customer service. In order to understand what your customers feel is a good level of service, you first need to ask them. Find out what your customer wants from your product or service. Then work out how you can meet those needs.

## **DARE TO BE BOLD**

In today's emerging and aspiring world, we need to be bold. This seminar encourages us to achieve what we have yet to accomplish and to help us create an action plan to get there. It will touch on why we need to be bold, what holds us back, and what empowers us to move forward. This is a highly motivating class that will leave all participants thinking about their next steps in work and life.

## **DEALING WITH CHALLENGING PEOPLE**

We all have different perspectives when defining a challenging person. Some people challenge the lives of many others, and then, there are types who can just get under our skin and push our buttons. Regardless of the particulars, we have two choices: we can learn how to effectively deal with the difficult person, or we can remove the possibility of interaction with them. In this class we will learn how to deal with the challenging people in our lives.

## **DEALING WITH THE ELEPHANT IN THE ROOM**

Dealing with the Elephant in the Room is a communications development seminar in which participants learn the skills to talk to anyone about anything. Participants begin by identifying the uncomfortable issues and realities they face at work and at home. Then they learn how to confront such issues with tact, empathy, and clarity. This seminar helps increase productivity and improve relationships by proactively addressing problems, conflicts, and misunderstandings.

## **DELEGATION**

The concept of delegation garners agreement in practice but can be difficult to achieve. This program will define delegation, determine what it is and what it's not, explain when to delegate and explore the barriers to delegating as well as the benefits. There will be plenty of opportunities for discussion and participants will use a delegation pyramid to describe the delegation process, examine the importance of regular and frequent communication and learn when to say no."

## **DISABILITY INCLUSION IN THE WORKPLACE**

This seminar is a deep dive into the importance of having an inclusive work environment and best practices on how to be more aware. During this seminar we will do a review of the Americans with Disabilities Act and have a facilitated discussion on ways to foster inclusivity in the workplace.

## **DIVERSITY IN THE WORKPLACE**

This class is not meant to fulfill a diversity requirement. It is meant to be an honest and open exchange of how detrimental and unacceptable certain demeaning behaviors are to groups that are different from the majority. The goal is not to attempt to change people's beliefs on diversity, but instead, change their behavior and reactions to situations.

## **DOMESTIC VIOLENCE**

On average, more than 1 in 3 women and 1 in 4 men in the US will experience some form of domestic abuse or violence. Ending the myths and stigmas that surround domestic violence requires us to educate ourselves. This class will allow us to get a better understanding of what domestic violence is, signs to look out for, traits of what an abuser can look like and tips on how to help someone or get help for yourself.

## **DYNAMICS OF CHANGE MANAGEMENT**

Change is stressful and learning how to manage and cope with change is crucial to our well-being in this ever-changing world. Although the stress of change is unavoidable, you can learn how to deal effectively with change in the workplace and in your personal life. In this seminar, participants will learn effective ways to cope with change in addition to learning how to take charge of the aspects that can be controlled. Core concepts related to stress and the emotional and physical responses we must change will be discussed, along with effective stress management strategies.

## **EFFECTIVE INTERVIEWING SKILLS FOR INTERVIEWERS**

In this interactive seminar, participants will learn and practice essential skills for conducting successful interviews and creating a systematic hiring process that will yield effective results.

## **EFFECTIVE ONE-ON-ONE CONVERSATIONS**

It is our goal to help participants learn how to be understood in a one-on-one conversation. We will examine why the conversation is happening, what needs to happen and how to achieve your goals effectively.

## **EFFECTIVE PERFORMANCE APPRAISALS**

Delivering a performance appraisal can be as intimidating for a manager as it is for the employee. The goal should be to not only document and evaluate the employee's performance, but also set goals for growth and allow for an open and honest dialogue about expectations.

## **EFFECTIVE PRESENTATION AND PUBLIC SPEAKING SKILLS**

Having excellent presentation skills is essential for success. In this seminar, participants will learn how to plan for successful presentations, build confidence, practice verbal and body language elements and learn how to build a rapport with an audience, to keep them engaged. We will also discuss how to use humor in presentations and manage adversity.

## **EFFECTIVE PRESENTATION SKILLS FOR LEADERS**

Everyone can learn how to become a more effective speaker. A leader needs to influence and inspire their team. This class will look at some effective, proven orators and how the power of words empowers individuals to accomplish things they never thought possible. We will cover powerful word choices as well as do's and don'ts.

## **EMOTIONAL INTELLIGENCE**

Many of us know that getting along with others is the key to success. Our ability to "play nicely in the sandbox" is fundamental to both our career and our health. We will discuss what an emotion is, why you are having it and understand how our feelings can affect our moods in our daily life and the people that surround us.

## **EQ MAKING IT WORK FOR YOU**

This seminar is meant to follow the Emotional Intelligence class, although it is not a pre-requisite. This is an in-depth class focusing on what an emotion is and how understanding our emotions can help make or break situations. It's an interactive tool-based seminar that dives deeper into the amazing world of emotional intelligence.

## **ETHICS AND VALUES**

What a changing world we live in. What are the core values and ethics of our business world? How do we live by them and why are they important? This workshop addresses the philosophical aspects of ethics and values through hands-on, practical approaches to events in participants' personal and professional lives. We will also address how to show your manager/partner/child that you are a person of ethics and values.

## **EVERYTHING YOU NEED TO KNOW ABOUT LINKEDIN**

This program defines LinkedIn and explains what it does and what it's used for. The presentation gives instructions for getting on LinkedIn and how to network and connect with the participants' interests. Participants will also explore types of LinkedIn services, additional networking options and how to successfully use it for marketing.

## **FOSTERING INCLUSION IN THE WORKPLACE**

Inclusive work environments are productive environments! This seminar discusses how employees and managers can create an inclusive workplace. Participants will learn to identify activities, attitudes and assumptions that exclude coworkers. They will then explore ideas to include others in ways that enrich the office environment as well as their own personal lives.

## **HANDLING AND MANAGING CHAOS**

This class will engage participants in learning how to handle chaos. We have all learned that chaos plays a bigger role in our lives, and for many, this has been a major source of anxiety. We invite participants to examine their pre-conceived notions of chaos and begin the process of welcoming it into their everyday lives.

## **HANDLING DEATH IN THE WORKPLACE**

There are many ways people handle grief and death. The challenge is to be able to handle all of the personal coping behaviors and not be judgmental during times of high emotion, in the workplace. Participants delve into handling awkward, uncomfortable interactions at work, while acknowledging varying relationships between coworkers.

## **HEALTH AND WELL-BEING IN THE WORKPLACE**

Discover how to enhance your health, well-being, and productivity by relieving stress with simple relaxation techniques. Explore ergonomics and learn how to prevent on-the-job injuries from lifting, repetitive stress (such as carpal tunnel syndrome) and computer-related injuries (headache, eyestrain, and back pain). The discussion will include work/life balance, how to establish priorities and the importance of healthy eating and regular exercise.

## **HOW TO BE AN INCLUSIVE LEADER**

Today's challenging times demand specific skill sets to ensure our workplaces allow all thoughts and actions to be voiced without fear. This class will focus on tools to unlearn our biases, the importance of psychological safety, and best practices for creating an inclusive work environment.

## **HOW TO CREATE THE SECRET SAUCE - THE PERFECT TEAM**

This class addresses the elements that go into creating a high functioning team. This class is an interactive discussion and provides a glimpse into the way a team needs to work in today's fast paced environment. It encourages individuals to think about what they do that adds value to the team.

## **HOW TO DELIVER AMAZING ONLINE PRESENTATIONS**

The goal of this class is to provide participants with a fundamental understanding of how to effectively facilitate online presentations for colleagues and customers. While providing an extensive overview of best practices for online workplace etiquette, this class highlights specific action steps to ensure video meetings are engaging, professional, and productive.

## HOW TO EXECUTE IN BUSINESS

Having a vision is only half of the equation in a successful business. So many leaders often get derailed from a great strategy when they are unaware of the proper steps to take to execute their strategy. This class will focus on the key building blocks to ensure that your business strategy is successfully executed.

## HOW TO TAKE THE EDGE OFF GIVING FEEDBACK

The objective of this course is to teach participants how to give constructive feedback. Some topics to be reviewed include the reasons to give someone feedback and why we avoid it. Participants will also learn about an effective feedback model and how to avoid value judgments.

## INTERACTING WITH ILL COWORKERS

Having a seriously ill employee in the workplace can be difficult for both the employee and their coworkers. The situation can create stress and awkward conversations. This class is meant to ease the stress of these interactions by teaching real strategies as well as do's and don'ts.

## INTERVIEWING FOR INTERVIEWEES

We spend more time at work than anywhere else so a decision as big as where to work deserves thought and planning. In this class, we will look at each of these individually: our values, interests, skills and passions. Participants will also learn how to put their best foot forward and be prepared for the interviewing process.

## INTRO TO NEURODIVERSITY

This class offers a genuine discussion on understanding and embracing the multiple ways our brains work. Whether it's ADHD, Autism, mental health, or a number of other differences, understanding neurodiversity can be relevant to us all. Join in the conversation to learn how we can partner together to celebrate the value neurodiversity brings to our workplace, home, social community, and lives.

## INTRODUCTION TO SOCIAL MEDIA MARKETING

Are you overwhelmed with the vastness of social media and wonder how to even begin using it as a marketing tool? This introductory session will help you understand the basics of social media marketing. In addition, you will receive an overview of Facebook, Twitter, LinkedIn, Instagram, Pinterest, Snapchat, Google and Hootsuite. This session is a good first step toward creating a social media marketing plan for your organization.

## LEADERSHIP

Leadership is a critical skill that every professional should possess in order to be successful in today's work environment. In this interactive workshop, we will discuss essential skills to enhance your leadership abilities, such as motivating employees and strategies to strengthen communication skills. Through discussion and role-playing, we will explore the five components of an emotionally intelligent leader.

## LEADERSHIP FOR WOMEN

This class is specifically for women and covers the history and trends of women in leadership, as well as the special challenges and needs women have when in positions of leadership.

## LIFE IN TODAY'S UNCERTAIN TIMES

The uncertainty of our world poses many challenges for us in the workplace and at home. The increase of stress from social and racial tension, along with its fast-changing climate, requires tools to make good decisions. This class will look at the dynamics of this environment and provide the tools for managing the range of emotions we feel. This includes ways of talking with coworkers regarding sensitive issues, as well as taking care of ourselves and increasing our resiliency.

## MAINTAINING A HEALTH-CONSCIOUS WORKPLACE

For many of us, the last time we heard about incident command, safety, or a healthy work environment was during our onboarding process, which could have been many years ago! However, these topics, among others, have remained relevant and recent events have highlighted the need to reinforce and reinvent the way we communicate these ideas, through yearly training. This topic is centered on a novel, general pitch of these topics that will illustrate how employees can become involved and raise awareness of workplace policy management. While not a formalized training on these issues, the seminar will spark conversation and ideas about how to better implement safety and health-conscious attitudes in the workplace and serve as a springboard to the government-certified courses.

## **MAINTAINING A SAFE WORK ENVIRONMENT**

A safe work environment is created by organizational leadership and staff. It involves understanding risk. It also involves defining unacceptable behavior and establishing consequences. Workplaces are safer when employees know how to handle disruptive situations and effectively document incidents. Workplaces that are open to the public, and that service clients and customers, face special challenges which are also addressed in this session.

## **MAKING MEETINGS EFFECTIVE**

We often must spend more time in meetings than we would like. Whether you attend or run meetings, we will review how you can make them efficient, effective and productive.

## **MAKING THE MOST OF A MULTI-GENERATIONAL WORKFORCE**

This is the first time in history it's possible for five generations to work together. This class will help you understand why each generation has certain identifiable characteristics and how to best work with each generation, to create a cohesive and productive workforce.

## **MANAGER'S GUIDE TO BURNOUT**

Burnout is a serious issue affecting most today's employees. When left unaddressed, it can drastically lower not only their work performance, but their mental and physical health as well. In this presentation, managers will learn what burnout is, how to recognize it in their employees, and how to help.

## **MANAGER'S GUIDE TO CHECK-IN CONVERSATIONS**

We know that from time to time everyone needs a check-in. This class will provide you with tips and tools to use during these conversations with your employees. During this session, we will look at what our role is as a manager when we notice or hear about an employee with a mental health concern. We will look at what is ok to do and say, and what is not ok. We will talk about when we need to bring in help to handle a situation and how to make a referral.

## **MANAGER'S GUIDE TO SELF-CARE**

We often think that the best manager is the one who can take care of everyone else, so, getting managers to buy into the notion that they come first can be challenging. During this class, we will discuss why it is important to put yourself first and how to do that. We must take time to unplug and recharge so that we can be the best version of ourselves.

## **MANAGERS GUIDE TO PROMOTING FAMILY HEALTH**

When managers show they care, employees are more likely to be more dedicated to their work. Managers will learn how to empower employees with knowledge to promote and maintain healthy living on the home front.

## **MANAGING PREGNANT EMPLOYEES**

Managing pregnant employees means balancing concerns of the employee, the requirements of the Americans with Disabilities Act, and the need for reasonable accommodations. Discussion will include supporting your entire team through the employee's transition, during parental leave, and upon the employee's return.

## **MANAGING PRIORITIES TO MAXIMIZE YOUR DAY**

To keep up in today's dynamic and fast-paced business environment, people need to continuously improve their planning and prioritizing skills. Feeling overwhelmed by competing priorities, tight deadlines, meetings, emails, and interruptions can derail professional growth, impair team performance and lead to stress and burnout. The focus of this program is on obtaining practical skills, tools and techniques to maximize collective gains in effectiveness and increase productivity. Through interactive participation and analysis of their own data, participants will learn a set of tools they can apply, to achieve better results.

## **MANAGING SOCIAL CONNECTIONS**

Managing social connection is essential for our workplace to be an environment of appropriate work relationships between direct reports, employees and supervisors. In a competitive world, savvy searchers can discover corporate strategy that is unintentionally disclosed through communication on social networks. Workers may expose themselves to wrongful termination, their companies to harassment, or other legal actions through inappropriate communications. Participants will learn how to protect their reputations and the productivity of their company.

## **MANAGING STRESS FOR MANAGERS**

This seminar will equip managers with tools to identify stressors - both good and bad - as well as the physical symptoms of stress and the bad habits that are presented when stress goes unchecked. Participants will examine many areas of life, including work expectations, relationships, nutrition, exercise, sleep, finances and time management. Managers will learn how to create a healthy lifestyle that ultimately benefits work and home.

## **MANAGING STRONG EMOTIONS: FOR EMPLOYEES**

Strong emotions are inevitable. This class goes beyond identifying emotions to help us manage and control ourselves when all of our buttons have been pushed. We need real strategies to enable us to say and do the right thing. We will share state-of-the-art techniques that will ensure you will keep your cool.

## **MANAGING STRONG EMOTIONS: FOR MANAGERS**

Preventing outbursts has become one of our most important tasks. Learn how to read your employees so you can keep strong emotions under control. Additionally, learning how to teach appropriate strategies for managing emotions, will be outlined in this class.

## **MANAGING TELEWORKERS: FOR MANAGERS**

Preventing outbursts has become one of our most important tasks. Learn how to read your employees so you can keep strong emotions under control. Additionally, learning how to teach appropriate strategies for managing emotions, will be outlined in this class.

## **MANAGING TRAUMA IN THE WORKPLACE**

This training is about the signs and symptoms of traumatic experiences and posttraumatic stress disorder (PTSD). In this training, you will learn about the history of PTSD, the signs and symptoms of PTSD, what qualifies as a traumatic event and how to intervene when someone is experiencing a flashback, nightmare or if they have been triggered. This training also discusses appropriate ways of coping with trauma stressors and how to practice self-care, after experiencing a traumatic event.

## **MANAGING YOUR BOSS**

Is your boss brilliant and focus-challenged, or a procrastinator who makes thoroughness impossible? The answer to these and other challenges is to manage your boss. This seminar will give participants tools to analyze both their skills and work habits, as well as their boss'. Participants will be able to create a game plan, including communication tools, to make work meaningful and productive.

## **MENTAL HEALTH: A GUIDE FOR MANAGERS AND LEADERS**

During this seminar, you will learn about what Mental Health is and its contributing factors. As managers and leaders, it's important to know what signs and symptoms to look for in employees. It is also critical to know what role you play, when it is or isn't appropriate to intervene, and who to partner with when you need help. You will leave this seminar with an understanding of the tools and techniques you can use to initiate and navigate these difficult situations/conversations.

## **MENTORING**

Explore your potential through mentoring. Both personal and professional growth goals can be significantly supported through the use of a mentor. This topic will help you understand what a mentor is, the different types of mentors, how to find and utilize the best mentor for your goals, the many benefits of having/being a mentor and much more.

## **MOTIVATE, RECOGNIZE AND ENERGIZE ASSOCIATES**

This high-energy seminar will help participants create a tool bag of techniques to motivate employees and managers. We will cover self-care, positive psychology, resiliency, laughter and more! This workshop discusses how motivation and recognition leads to increased productivity. Nonmaterialistic ways to make your employees feel special and valued will also be shared.

## **MOTIVATION: BRINGING OUT THE BEST**

In this class, we look at the inspiring theories of motivation and how they help us in our work, every day. The class is geared to employees but can be oriented as an effective manager's tool. This is a chance for all of us to examine what gets us motivated.

## **MOTIVATIONAL INTERVIEWING**

This class teaches the history of motivational interviewing, how to do it, what questions to ask and when this technique might be useful (e.g., for weight loss, smoking cessation, or a gambling addiction).

## **NONVERBAL COMMUNICATION**

In this class, we will discuss how we communicate, without words. We'll look at the importance of body language and the messages it can convey. Discussion will focus on awareness and practice.

## **OPIOID ADDICTION- MANAGER VERSION**

Opioid abuse and dependence have become a national epidemic. This training will educate on what opioids are, as well as provide information on signs and symptoms of opioid abuse/dependence. This training also outlines what to do if you suspect an employee has an opioid problem and what the employer's responsibilities are in this situation.

## **OVERCOMING WORK FATIGUE**

For many, working remotely is no longer new. But the joys of working in sweatpants from the comfort of home has given way to some unexpected challenges. From video call fatigue to social isolation, this topic explores strategies to implement consistent work from home success for employees and organizations alike.

## **PERFORMANCE MANAGEMENT**

The performance management process, when implemented well, ensures that people have the right training, support, and feedback to accomplish their jobs. As a manager, you play an integral role in this process. In this session, we will look at what an effective performance management process looks like and how providing coaching and developmental opportunities can increase the likelihood that employees will achieve results that are in line with the organization's mission and objectives.

## **PRACTICAL PRODUCTIVITY**

During this seminar we will dive in to look at how current events are affecting productivity, while identifying and understanding the pros and cons of a constant connection. We will discuss dealing with changing technology and how we can be more effective through email, our smartphone and other devices. The goal is to understand how we can make technology work for us.

## **PREPARING FOR INTERVIEWS**

The interview is the opportunity for you to sell your skills and to show the interviewer why you are the right fit for the position. In this class, we will cover the tools and techniques to learn how to make a great first impression in an interview.

## **PREVENTING SEXUAL HARASSMENT**

In this seminar we discuss the definition and history of sexual harassment, as well as the different types that can occur. This complex topic will be broken down for employees to understand how important it is to create a respectful workplace. Bullying behavior is also explained, and best practices to handle it are discussed.

## **PREVENTING SEXUAL HARASSMENT IN CA**

This class will meet the requirements of the state of California's mandated training for compliance, which supervisors are required to take every two years.

## **PREVENTING SEXUAL HARASSMENT IN NY**

This class will meet the requirements of the State of New York's mandated training for compliance, which employees are required to take annually.

## **PROCRASTINATION**

Do you tend to "get stuck" and put things off? Are you often faced with panic surrounding a deadline? Many of us tend to procrastinate at times, which is why it's vitally important to understand what drives your procrastination. Join us to discover why you procrastinate and learn tactics to get unstuck, just do it, and move productively forward!

## **PRODUCTIVITY SKILLS**

Productivity can be a variety of things, in a variety of fields. Being productive is not just limited to finishing your work, but includes organizing your tasks, building relationships within the office, and being able to manage your time effectively. This also includes the ability to learn new skills, such as multitasking and being able to block out distractions. Everyone can learn ways to be more productive. This class will give you tips and pointers on how to be more productive at work each day.

## **PROFESSIONAL USE OF TEXTING**

In today's day and age, with so much technology at our fingertips, one thing we have become very accustomed to is texting, whenever and wherever we are. One thing we have to be careful of is using texting appropriately in the workplace. This seminar is designed to help both employees and managers use texting in a professional way.

## **PROFESSIONAL WRITING AND EMAIL ETIQUETTE**

How do you ensure your email will be read? This program identifies the do's and don'ts of email and offers suggestions for writing emails in a way that captures the attention of the recipient and gives them all the pertinent information. The presentation includes information about subject lines, format, content, emotions, grammar and punctuation, signatures and the use of CCs and BCCs.

## **PSYCHOLOGICAL WELLNESS IN THE WORKPLACE**

Psychological wellness is a class that explains how and why it is critical that we learn how to feel safe at work. We will delve into the challenges and practices of creating a safe workplace. The focus will be on the benefits of creating a psychologically safe space for all employees, as well as some of the consequences of not having a safe environment.

## **QUALITY IMPROVEMENT**

Making an organization, team, or department the best it can be is something we all need to be responsible for, on a daily basis. Continuous improvement is the only way to look at and make the necessary changes. We will do an overview of a few tools that can help you move forward. Fish boning, process-mapping and change management are a few skills that will be introduced.

## **RECOGNIZING THE TROUBLED EMPLOYEE**

In this seminar you will learn to recognize an employee who may be struggling with a variety of issues that can impact their work and learn how these issues can impact an organization. You will learn key strategies to address these issues to help the employee be productive and thrive in the work environment.

## **RESPECT FOR ALL IN THE WORKPLACE**

The goal of this class is to provide participants with a fundamental understanding of the power of creating an inclusive workplace for colleagues while demonstrating respect for all members of an organization. An inclusive, respectful environment for all is a universal expectation, and this class highlights specific action steps to show respect and support to members of the LGBTQI+ and African American communities. Finally, participants will gain a deeper understanding of implicit bias, microaggressions and code switching.

## **RIDING THE CHANGE WAVE**

Change is one of life's constants. Like waves on the ocean, there will always be one after another. Each one can provide excitement and a challenge, or it can wipe you out. This workshop begins with a look at the change process, types of change and then provides eight strategies to help when the transition is at home or work.

## **SCIENCE OF GOAL SETTING**

This class examines goal setting as a brain function. We will look at how the brain works by creating an awareness of the mental process, making it easier for us to develop new habits in relation to goal setting.

## **SEXUAL IDENTITY IN THE WORKPLACE**

Sexual identity has aspects that can affect us, our colleagues, our families, and our children. The goal of this class is to present information and frame the issues around sexual identity in the workplace to help create a good work environment for all.

## **SHIFTING PRIORITIES: BEING YOUR BEST ON A SHIFT SCHEDULE**

Changing to a shift schedule can be a dramatic change for you and your family. Variable schedules pose challenges, but the benefits can also be positive. In this class, we will show that a little planning combined with family cooperation goes a long way to making the most of the opportunities of shift work.

## **STAYING CONNECTED IN TODAY'S DIGITAL WORLD**

With the advances in technology that we have today, connecting with others is right at our fingertips. However, loneliness is at an all-time high. During this training, we will take a look at how technology has changed our day-to-day social interactions and how these changes have affected the way we connect and interact with others. We will explore ways to use technology wisely, yet still maintain that personal touch in our relationships.

## **STICK WITH IT**

What dreams or goals do you harbor that seem out of reach? In this program, participants will gain tips and insights into making those dreams a reality using plans, anticipating what may come, saying yes, identifying myths and obstacles, determining techniques for starting and exploring motivators, encouraging flexibility, and finding the ability to keep moving forward, to achieve your goals.

## **STORYTELLING**

Storytelling is a powerful way of putting ideas into the world. Not only do they move us, inspire us, and make us feel alive, stories can bring us hope and make us understand life better. This is not just a feel-good class; storytelling is now recognized as one of the top five skills needed for business leaders. We will examine what goes into good storytelling and how it can be a powerful tool for business.

## **STRESS MANAGEMENT FOR HIGH BURNOUT PROFESSIONS**

This seminar is designed to give managers and directors the tools to assess and address their needs, as well as their employees' needs, in a high-stress, high-trauma work environment. We will explore the newest research and what experts are saying, including the seven signs that correlate with burnout.

## **STRESS MANAGEMENT FOR MANAGERS**

This is a step-by-step seminar on what stress is, how it effects your team, and ways managers can help de-escalate their own stress and that of their staff. This is all about stress, with tips and tools to manage stress for both you and your employees.

## **STRESS MANAGEMENT FOR THE NEW PROFESSIONAL**

Stress, especially the pressures of handling a new profession, can be difficult to deal with. Knowing effective ways to help deal with this stress is crucial for being positive every day at work. Excessive stress can interfere with your emotional and physical well-being, which is not the way anyone would like to start their new career. In this class, you will learn ways to cope and manage your stress levels to keep yourself at the top of your game.

## **SUBSTANCE ABUSE FOR MANAGERS**

There are several aspects of substance abuse that managers need to know in order to understand how to deal with workplace issues legally, sensitively, and fairly. Your EAP is the ultimate resource, but often a manager is the gatekeeper for making sure that employees who need help, get help.

## **SUICIDE AWARENESS AND PREVENTION FOR MANAGERS**

During this class, we will review both myths and facts about suicide. We will discuss the warning signs to look for, as well as when and how we intervene. Managers will leave this session with tips for navigating difficult conversations, well as how to get employees the help they need.

## **SUICIDE PREVENTION**

In today's world, knowing the early warning signs of suicide is of critical importance. In a considerate manner, this seminar will explore the ways we can all play a role in identifying the warning signs and implementing suicide prevention programs at work and in our community.

## **SURVIVING MERGERS AND ACQUISITIONS**

In this seminar, participants will learn what to expect in the midst of organizational change, find out ways to navigate through the process and review the five phases of dealing with change. They will also learn about the opportunities and importance of self-care and making a commitment to the new business structure and culture.

## **SURVIVOR'S GUIDE TO DOWNSIZING**

Companies are under economic pressure to remain competitive and survive. Downsizing, or rightsizing, is happening rapidly everywhere - from one day to another, from one minute to the next. The major purpose of this workshop is to help move you to action.

## TEAMWORK

The ability to understand and communicate effectively in teams is an important part of our personal and professional success. Through discussion, interactive exercises, and a debriefing session, we will learn how to apply successful team concepts and strategies in very practical ways and explore how teams can work together most effectively.

## THE 5 BUCKETS PRINCIPLE (TM)

Is it possible to meet the competing demands of finances, friends and family, work, health, and community? The resounding answer is yes! In this fun, interactive seminar, participants will learn the 5 Buckets Principle of work/life balance to get the tools to prioritize what is and should be important to them. They will learn how to think about the BIG PICTURE without ignoring the little things that matter. We will show them how to find the time to manage it all, including time for themselves, and for fun, by identifying priorities, making choices, and managing expectations.

## THE ART OF NEGOTIATION

There is no job that doesn't use negotiation. It is the key to our career success. We all know that no one gives us anything for free, it is all about give and take. This is a motivating class in which individuals learn to strengthen their own personal negotiation techniques.

## THE FURLOUGHED EMPLOYEE

An unprecedented number of employers have furloughed employees. This course will compare and contrast the concepts of furloughs vs. layoffs. Employees will learn tips in this course, with a managers' version of this course also available.

## THE IMPORTANCE OF SHOWING UP TO WORK

Showing up for work demonstrates one's commitment, work ethic and an understanding of one's role in the larger scope of the organization. In this training, participants will identify work ethics, explore the impact of absenteeism in the workplace (the cost to business through the theft of time and the effect on morale), to determine how to encourage attendance and look at illness, root causes of absenteeism and tardiness.

## THE NEW RESUME

If you have not looked for a job within the last five years, you may not know that the entire job search process has completely changed, and that the role of the resume is very different. In this class, we will learn how to create the new resume.

## THE POWER OF PERSUASION: HOW TO INFLUENCE OTHERS

We all need to convince people to do or avoid certain things. We will cover best practices, tips, and examples of how to shift your style in a way that best appeals to the audience you're speaking to.

## THINKING TRAPS

This is an exploratory process as to how our thoughts can decrease our productivity and our passions. We'll look at how to define thinking traps, as well as how to action plans to overcome them.

## TRUST

A cornerstone of every relationship is trust. Defining trust and understanding its components are essential for meaningful relationships within our personal and communal lives. We will discuss why you need the trust of others, how you get it, how you lose it and how you get it back.

## UNCONSCIOUS BIAS

Are we on top of our biases, or might we be harboring some prejudices that lie outside of our awareness? This program will define unconscious bias and give us a framework for how we understand it. With numerous discussion opportunities, participants will explore biases, look at how unconscious bias is measured, examine the conflict that arises between one's natural inclination to categorize vs. the conscious drive towards diversity, and identify ways to overcome these biases. \*No recordings of live sessions for this topic.

## UNDERSTANDING COLLEAGUES WITH AUTISM

Learn important information related to adults living with autism spectrum disorder (ASD). This training will identify common behaviors, challenges and how to set your ASD employees up for success within your organization.

## UNDERSTANDING PERSONALITY TYPES

Understanding personality types can be somewhat confusing. This one-hour seminar is designed to gain a practical understanding of the different types of personalities and teach you how personality types can impact our behavior. Participants will identify their own personality type to learn how to use type preference as an energy management tool that enhances their skills in interpersonal communication.

## USING YOUR EAP BENEFIT

Learn about all of the benefits that your EAP can bring you: from finding childcare, to receiving legal advice and anything in between. We want to make sure you know the ins and outs of using your EAP and how it can help support you in your work and personal lives.

## WORKING WITH MILLENNIALS

During this seminar, we will look at tips and tools that can guide you while working with this mission-based generation of millennials; a generation that usually has a lot of misconceptions attributed to them. We will talk about why those misconceptions are out there and take a deeper dive into discussing what contributions and traits millennials bring to the workplace.

## WORKPLACE TRAUMA - FOR MANAGERS

Understanding the various aspects of trauma is part of living in today's challenging world. In this seminar, you will learn about the different aspects of trauma, including traumatic stress, Post Traumatic Stress Disorder, grief, and organizational trauma. The main focus of the class is understanding how trauma effects the workplace and learn best practices for leaders.

## YOU'RE PROMOTED! THE NEW MANAGER

For participants who were recently given a promotion, we discuss the importance of influencing and inspiring others. Participants will learn what it takes to make an effective manager by going over communication skills that help build confidence within their team along with when and how to delegate certain tasks.



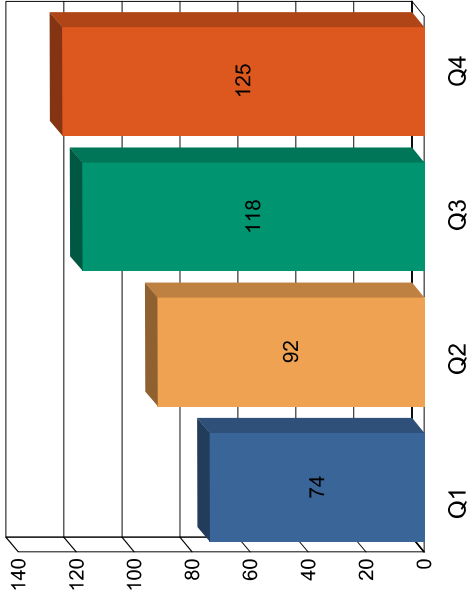
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# Your Employee Assistance Program Annual Utilization Report

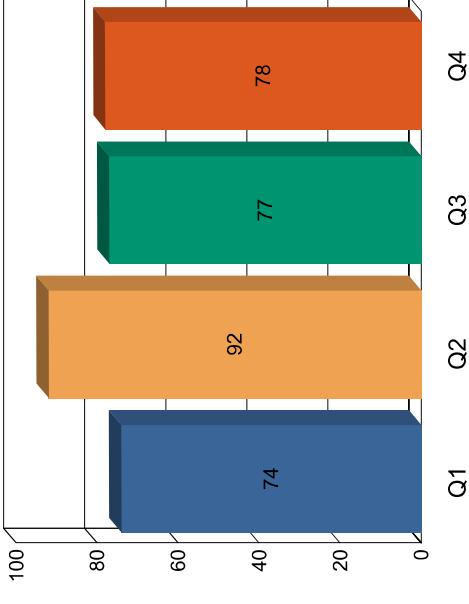
Group Name

EAP Utilization Summary						YTD Annualized %-Book of Business
	Q1	Q2	Q3	Q4	YTD Total	YTD Annualized %
Eligible Employees (average)	5025	5025	5025	5025	5025	
Total Contacts: Member/Manager Requests & CIR/Training/etc. Participants	74	92	118	125	409	8.14%
Total Service Requests: Members & Managers	74	92	77	78	321	6.39%
Total Referrals to EAP Network Counselor	25	36	38	28	127	2.53%
						3.14%

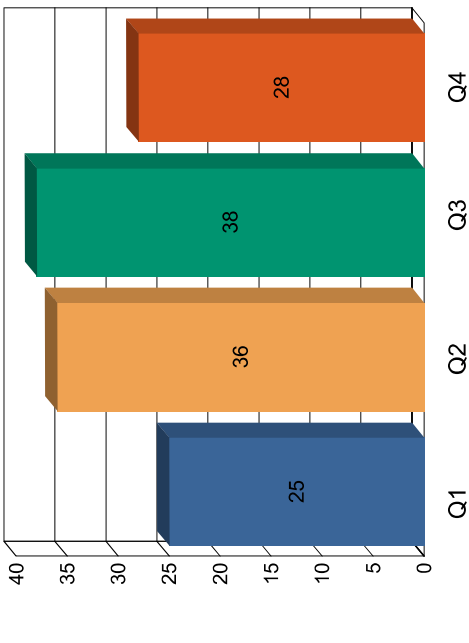
Employees/Household Members/Managers With Any EAP Contact



Employees/Household Members/Managers Calling EAP for Services



Employees/Household Members Referred to EAP Counselor



**Your Employee Assistance Program  
Annual Utilization Report**

**Group Name**

Telephonic Response Summary		Q1	Q2	Q3	Q4	YTD Total
Average Speed of Answer (sec)		31.00	38.00	133.67	154.00	89.17
Abandonment Rate		2.67%	3.95%	11.91%	12.85%	7.84%

Member Service Requests		Q1	Q2	Q3	Q4	YTD Total
Employee/Household Member Service Requests		73	89	74	78	314

# Your Employee Assistance Program Annual Utilization Report

Group Name

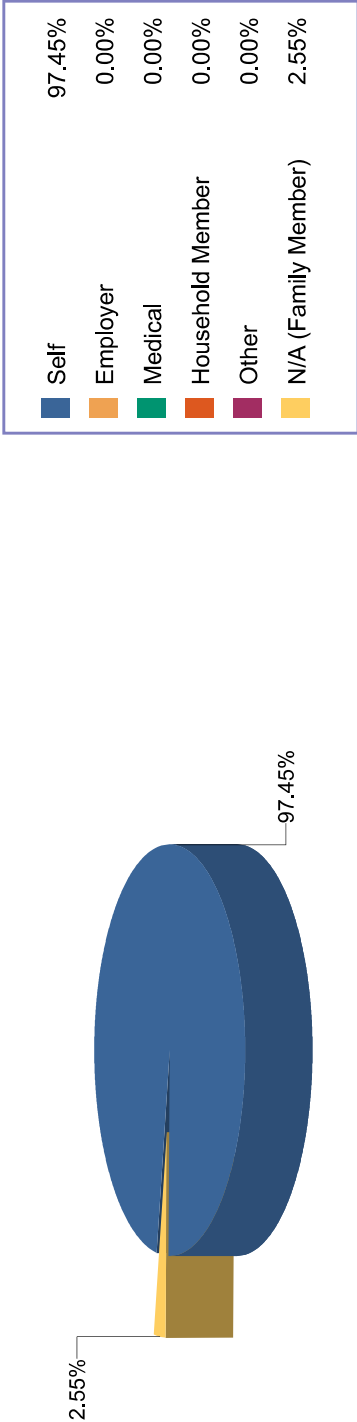
EAP Information Source	Q1	Q2	Q3	Q4	YTD Total	Percentage
Promotional Materials	11	4	5	8	28	13.59%
Prior EAP	18	23	19	10	70	33.98%
Supervisor/HR	9	23	24	22	78	37.86%
Medical	2	1	0	5	8	3.88%
Condition Care	0	0	0	0	0	0.00%
My Health Coach	0	0	0	0	0	0.00%
Complex Care	0	0	0	0	0	0.00%
Comprehensive Med Mgmt	0	0	0	0	0	0.00%
Future Moms	0	0	0	0	0	0.00%
Disability	0	0	0	0	0	0.00%
Union	0	0	0	0	0	0.00%
Friend/Coworker	0	2	0	0	2	0.97%
Family	4	3	1	2	10	4.85%
Other	0	4	5	1	10	4.85%

Your Employee Assistance Program  
 Annual Utilization Report

Group Name

Relationship to Company	Q1	Q2	Q3	Q4	YTD Total	Percentage
Employee	65	75	72	72	284	90.45%
Household Members	8	14	2	6	30	9.55%

Employee Referred By	Q1	Q2	Q3	Q4	YTD Total	Percentage
Self	71	87	73	75	306	97.45%
Employer	0	0	0	0	0	0.00%
Medical	0	0	0	0	0	0.00%
Household Member	0	0	0	0	0	0.00%
Other	0	0	0	0	0	0.00%
N/A (Family Member)	2	2	1	3	8	2.55%



Your Employee Assistance Program  
Annual Utilization Report

Group Name

Participant Type	Q1	Q2	Q3	Q4	YTD Total	Percentage
New Participant	55	73	53	68	249	79.30%
Returning Participant	18	16	21	10	65	20.70%

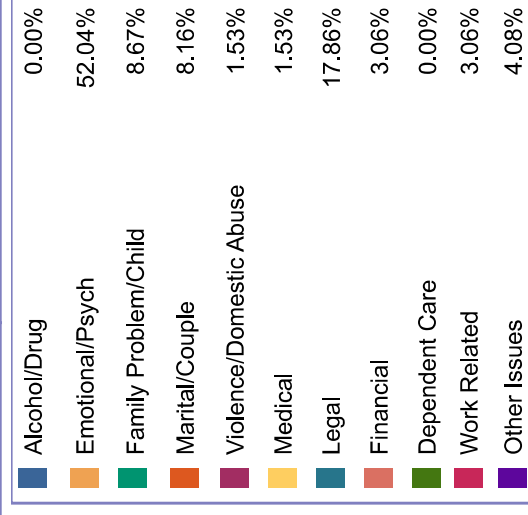
Acuity	Q1	Q2	Q3	Q4	YTD Total	Percentage
Emergent	0	0	0	0	0	0.00%
Urgent	0	0	0	0	0	0.00%
Routine	41	59	52	45	197	100.00%



# Your Employee Assistance Program Annual Utilization Report

**Group Name**

Presenting Problems	Q1	Q2	Q3	Q4	YTD Total	Percentage
Alcohol/Drug	0	0	0	0	0	0.00%
Emotional/Psych	18	35	25	24	102	52.04%
Family Problem/Child	2	6	7	2	17	8.67%
Marital/Couple	2	3	7	4	16	8.16%
Violence/Domestic Abuse	0	0	0	3	3	1.53%
Medical	2	1	0	0	3	1.53%
Legal	14	9	10	2	35	17.86%
Financial	1	1	0	4	6	3.06%
Dependent Care	0	0	0	0	0	0.00%
Work Related	2	1	2	1	6	3.06%
Other Issues	0	3	1	4	8	4.08%

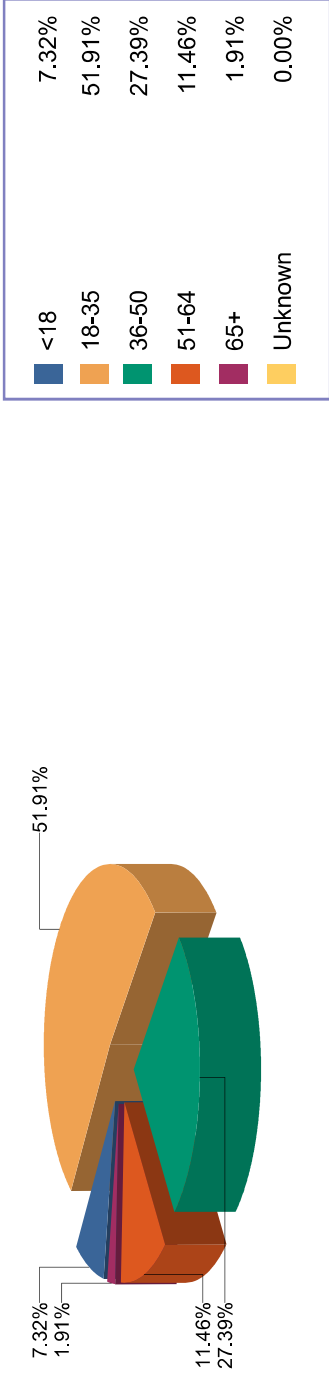


# Your Employee Assistance Program Annual Utilization Report

Group Name

Gender	Q1	Q2	Q3	Q4	YTD Total	Percentage
Female	48	63	57	54	222	70.70%
Male	22	26	16	23	87	27.71%
Prefer not to Say	3	0	1	1	5	1.59%

Age	Q1	Q2	Q3	Q4	YTD Total	Percentage
<18	2	13	4	4	23	7.32%
18-35	40	40	39	44	163	51.91%
36-50	19	25	23	19	86	27.39%
51-64	10	11	5	10	36	11.46%
65+	2	0	3	1	6	1.91%
Unknown	0	0	0	0	0	0.00%



# Your Employee Assistance Program Annual Utilization Report

Group Name

Services & Referrals Provided	Q1	Q2	Q3	Q4	YTD Total	Percentage
Telephonic Clinical Consultation	4	9	10	8	31	7.00%
EAP Benefit Inquiry	33	32	22	33	120	27.09%
EAP Network Counselor	25	36	38	28	127	28.67%
Legal Services	16	9	11	2	38	8.58%
Financial Services	2	1	1	3	7	1.58%
Childcare Resources	0	0	0	2	2	0.45%
Adultcare Resources	0	0	0	0	0	0.00%
Other Work/Life	0	0	0	5	5	1.13%
Healthplan-Behavioral	0	0	0	1	1	0.23%
Healthplan/Disease Mgmt	0	0	0	0	0	0.00%
Disability	0	0	0	0	0	0.00%
Other: EAP Website, Emotional Wellbeing Resources, etc.	24	36	31	21	112	25.28%

Web Services Provided	Q1	Q2	Q3	Q4	YTD Total
Web Logins	317	393	401	315	1426
Web Pages	1045	1233	1230	1158	4666

# Your Employee Assistance Program Annual Utilization Report

Group Name

New Requests for Management Consultation	Q1	Q2	Q3	Q4	YTD Total
New Requests for Management Consultation	1	3	3	0	7

Management Consultation Reasons	Q1	Q2	Q3	Q4	YTD Total	Percentage
Psychological/Personal	1	2	2	0	5	71.43%
Substance Issue	0	0	0	0	0	0.00%
Workplace Issue	0	1	0	0	1	14.29%
Trauma	0	0	1	0	1	14.29%
Other	0	0	0	0	0	0.00%

# Your Employee Assistance Program Annual Utilization Report

## Group Name

New Request for Management Referral	Q1	Q2	Q3	Q4	YTD Total
New Request for Management Referral	0	0	0	0	0

Management Referral Reason	Q1	Q2	Q3	Q4	YTD Total	Percentage
Psychological/Personal	0	0	0	0	0	0.00%
Workplace Performance	0	0	0	0	0	0.00%
Workplace Interpersonal	0	0	0	0	0	0.00%
Substance Issue	0	0	0	0	0	0.00%
Other	0	0	0	0	0	0.00%

# Your Employee Assistance Program Annual Utilization Report

Group Name

YTD Total																			
Q1					Q2					Q3					Q4				
Employer Services Provided	Events	Hours	Attn		Events	Hours	Attn		Events	Hours	Attn		Events	Hours	Attn		Events	Hours	Attn
Account Management Services	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Employee Orientations	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Supervisor Training	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Training/Workshops	0	0.00	0		0	0.00	0		2	2.00	27		2	2.00	47		4	4.00	74
Critical Event Management	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Critical Incident Response (CIR)	0	0.00	0		0	0.00	0		1	1.00	14		0	0.00	0		1	1.00	14
Policy Consultation	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Organizational Development	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0
Coaching	0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0		0	0.00	0

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# Overcoming Burnout



A presentation delivered to you on behalf of Anthem EAP

# Overcoming Burnout

- Definition of burnout
- Recognize how burned out you are
- How to recognize burnout in others
- Consequences of burnout
- Basic self-care
- Strategies to overcome burnout
- Strategies to help others overcome burnout

# The Facts

Employees who say they very often or always experience burnout at work are:

- 63% more likely to take a sick day
- Half as likely to discuss how to approach performance goals with their manager
- 23% more likely to visit the emergency room
- 2.6 times as likely to be seeking a different job
- 13% less confident in their performance

# What are the Causes?

- Lifestyle choices
- Lack of control
- Unclear or unrealistic expectations
- Job or workplace issues and concerns
- Individual personality characteristics
- Stress

# What Burnout Is And Is Not

## What Burnout is:

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A condition related to:

- Overwhelming stress
- Depletion of energy
- Inability to find inner strength

Requires an action plan to recover

## What Burnout is Not:

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- Regular mental or physical exhaustion
- Something a good night's sleep will fix

# What Applies To Your Life?

- Dread going to work
- Crying, feeling anxious
- Low work morale
- Job security concerns
- Difficult co-workers
- Fewer staff/employees & more work
- Frequent distractions/upset
- High pressure work environment
- Inability to say “no”
- Bitter about duties above your paygrade
- Last-minute project requests
- Lack of control over work or pace
- Indecisive, insecure
- Feeling like a failure

# What Applies To Your Life? (continued)

- Lack of information
- Meddling, overbearing bosses
- Monotonous work
- Underappreciated
- Speed/complexity of the workload
- Tight deadlines
- Too many demands
- Negative thinking
- Perfectionism
- Unclear job expectations
- Work in the helping profession
- Physical illness: gastrointestinal, ulcers, high blood pressure, heart attack, stroke
- Excessive self-medicating: eating, smoking, drinking, drugs

# Assessing Your Level Of Burnout

- How hard is it to get up in the morning?
- How much physical and emotional energy do you have, on a scale of 1-10?
- How much do you enjoy your job, on a scale of 1-10?
- How often do you feel excited at work, on a scale of 1-10?
- Do you have 1 year, 3 year and 5 year plans?
- Do you still have dreams, hopes and aspirations for your job, your career, your life?

**The first step is awareness!!**



# Recognizing Burnout in Others

- Simply ask these same questions of your loved ones or co-workers
- Do you observe these behaviors in them?
- Burnout can be contagious
- Do you have co-workers who are *ALWAYS* negative and drag everyone down?
- What happens when work negativity spills over at home?

# Components of Burnout

- Depersonalization: Separating yourself emotionally from your work; Disconnecting from work
- Decreased sense of accomplishment from work, resulting in a cycle of working more hours with no achievement or fulfillment
- Emotional exhaustion

# Burnout Scale

- Cranky
- Tired
- Exhausted
- Depleted
- Burned Out



# Consequences of Burnout

## Physical

- Chronic stress
- Fatigue
- High blood pressure
- Increased risk for heart disease and diabetes
- Compromised immunity

## Psychological

- Depression
- Anxiety
- Anger
- Irritability
- Lack of motivation
- Feelings of helplessness
- Resentment

## Occupational

- Job dissatisfaction
- Withdrawal from colleagues
- Poor work performance i.e., absenteeism, missing deadlines, negativity
- Missing out on potential growth opportunities

# Complete the Stress Response Cycle

Understand the difference between your stress triggers and stress

Deal with the stress in your body, from a physiological perspective:

- Move
- Do something creative
- Laugh – Cry
- Take a deep breath

Develop a support network of caring, compassionate and encouraging people

# Strategies to Prevent and Overcome Burnout

- Identify and address the root cause: keep asking “why,” until you find it
- Challenge yourself: fully use your potential
- Pace yourself
- Welcome change!
  - Shake it up: change your commute, what you wear, where you eat lunch. We need to change up the scenery from time to time!
- Work on your organization skills and use a calendar
- Evaluate your progress and difficulties
- If you are truly burned out, find a mentor, coach or counselor who can support and encourage you

# Strategies to Prevent and Overcome Burnout (continued)

## Prevention

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- Practice self-care
  - Sleep
  - Diet
  - Exercise
- Work with purpose
- Set boundaries
- Communicate clearly
- Implement stress management skills

## Overcoming

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- Identify the cause by performing a work analysis
- Communicate with your boss: areas of concern and potential solutions
- Draw support from others
- Find meaning in your work
- Reestablish balance between your work and personal life

# Basic Self-Care

## 3 Universal Core Needs: Sleeping, Eating and Moving

- **Sleeping**
  - 7-9 hours seven nights a week for adults (children require 11-12)
  - Regulates mood, clears waste from our brain, and reenergizes our cells
- **Eating**
  - Nutrition impacts your mood and energy
  - Intuitive eating: beware of eating as a coping mechanism; “stress eating”
  - Try eating lighter, healthier foods to increase your energy level, and eat smaller more frequent meals
  - Hydrate!

## Basic Self-Care (continued)

- **Moving**
  - ▢ Helps your body and mind to recalibrate
  - ▢ Move 30 minutes per day or 3 smaller, 10 minute bursts of exercise
  - ▢ Even 5 minutes of outdoor exercise can have a meaningful psychological impact
  - ▢ Exercise reduces sensitivity to anxiety (a key symptom of burnout)

# Encourage Others to Live a Healthy Lifestyle

- Support trial and error on their part, as long as they are trying
- “Manipulate” changes
- Push others to go out of their comfort zone
- Help them to concentrate on what they can control and let go of what they can’t control
- Acknowledge that you understand burnout while encouraging them to set goals



# Reversing Burnout: Techniques

- Expect life to be tough from time to time
- Manage expectations: control what you can control
- Focus on the positives in your life
- Recognize that burnout is reversible
- Learn from your mistakes: fix 'em and forget 'em
- Clearly define roles and responsibilities at work and at home
- Improve communication
- Learn effective time management: schedule and delegate
- Talk to your doctor about your concerns and any physical or emotional symptoms

## Reversing Burnout: Techniques (continued)

- Practice relaxation techniques: mindfulness, guided meditation
- Take breaks
- Say “no”
- Celebrate accomplishments
- Reframe the experience; change the way you look at your job
- Connect with peers who will encourage you to be more positive
- Leave work on time
- Take breaks: lunch, vacations
- Start the day with music that pumps you up
- Put yourself first: make time for self-care



# Anthem EAP

is here for you.

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Visit the website: [anthemeap.com](https://anthemeap.com)  
And enter company code:  
Call us:

# THANK YOU FOR PARTICIPATING!

## Overcoming Burnout



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# EAP Implementation Plan



To be completed by:

EAP Client Consultant

EAP customer

Customer Name

Activity	Due By	Responsibility	Completed	Notes
<b>EAP Sales Notification</b>				
Obtain completed EAP Sales Application	60 days prior	EAP Client Consultant		
Confirm EAP model, rate, and eligible population.	60 days prior	EAP Client Consultant		
Identify health plan branding	60 days prior	EAP Client Consultant		
<b>Initiate Implementation</b>				
Identify EAP Client Consultant	60 days prior	EAP Client Consultant		
Identify internal partners such as Anthem Account Executive, Health & Wellness Coordinator, Billing, Clinical, etc.	60 days prior	EAP Client Consultant		
Identify Customer partners including primary contact for implementation. Gather contacts for legal, billing, program promotion, etc. for entry into EAP client management system (ASIS)	60 days prior	EAP Client Consultant		
Develop implementation meeting calendar	60 days prior	EAP Client Consultant		
<b>Access to Services</b>				
Identify EAP call center and toll free number	60 days prior	EAP Client Consultant		
Identify EAP website and log-in	60 days prior	EAP Client Consultant		
Activate EAP toll free number	One day prior	EAP Client Consultant		
Activate EAP website	One day prior	EAP Client Consultant		
<b>Client Information System</b>				
Identify third party vendors used by Customer that are key to EAP, for example, Disability or other Wellness provider for entry into ASIS	45 days prior	EAP Client Consultant		
Enter Customer data into EAP ASIS2	30 days prior	EAP Client Consultant		
Anthem Account team to provide culture training to customer service representatives	30 days prior	EAP Client Consultant		
Ensure any Customer nuances are noted in the Special Instructions tab (Customer service numbers, any internal communications requirements for referrals, etc.)	30 days prior	EAP Client Consultant		
<b>Employee/Employer Communications</b>				
Confirm Customer contact information including primary contact for EAP promotion; primary shipping address for printed materials; and recipient of electronic materials	60 days prior	EAP Client Consultant		
Provide Customer with sample EAP communications materials (summary of services, brochure, poster, fliers). Review how electronic materials (quarterly newsletter and monthly tip sheets) are sent in a bulk email	60 days prior	EAP Client Consultant		
Determine need for pre-implementation announcements or open enrollment material	45 days prior	EAP Client Consultant		
Develop EAP promotional plan	45 days prior	EAP Client Consultant		
Order communication materials	40 days prior	EAP Client Consultant		
Confirm EAP communication materials delivered to Customer	20 days prior	EAP Client Consultant		
<b>EAP Policy and Procedures</b>				
EAP and Customer to review Customer's workplace policies and procedures as they relate to EAP (Chemical Dependency, CISD, Disability Management, DOT, onsite health services, safety & security, sexual harassment, threat of violence/violence in the workplace, union specific protocols, etc.)	45 days prior	EAP Client Consultant		
<b>Legal</b>				

Prepare contract and submit to Customer for review. Any Customer with Anthem medical does not need to have a signature page in the EAP agreement since the document is an addendum to the medical agreement.	45 days prior	EAP Client Consultant		
For California Customers: discuss EOC process	45 days prior	EAP Client Consultant		
<b>Utilization Reports</b>				
Identify report recipient at Customer	60 days prior	EAP Client Consultant		
Provide sample EAP Utilization Report	60 days prior	EAP Client Consultant		
Review frequency of EAP utilization reporting	60 days prior	EAP Client Consultant		
<b>EAP Billing</b>				
Provide EAP billing overview to Customer. Confirm that the EAP rate, billing method, and initial employee count	60 days prior	EAP Client Consultant		
Confirm accuracy of first billing	Upon deliver of billin	EAP Client Consultant		
<b>Post-implementation Activities and Follow-up</b>				
Follow up with Customer to review satisfaction	Two weeks after lau	EAP Client Consultant		



DEPARTMENT OF FINANCE  
Oscar Knott, CPP, CPPO, VCO  
Purchasing Director

### **Addendum No. 1**

**Date:** April 26, 2023  
**Request for Proposal:** 23-2515-4LOC – Employee Assistance Program

Ladies/Gentlemen,  
Please make the following corrections, deletions and/or additions to the above referenced RFP:

1. Page 4, section IV., shall be revised to read as follows:

The following represents the timeline of the process currently anticipated by the County:

Request for Proposal Distributed	Thursday, April 13, 2023
Questions Due	Friday, April 21, 2023
Receive Written Proposals	Wednesday, May 10, 2023 at 11:30 am
Conduct Oral Interviews with Offerors	May 24, 2023
Negotiations Completed	TBD
Services Begin	August 1, 2023

2. All other specifications and General Terms and Conditions shall remain the same.

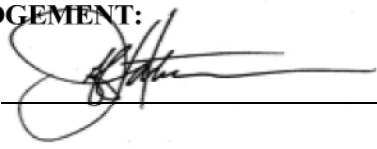
### **See attached Questions and Answers**

Offeror must take due notice and be governed accordingly. Acknowledgement of this addendum should be included in your proposal submission.

Sincerely,

Leisel Collins, CPPB, VCO, VCA  
Assistant Division Director  
[COL119@henrico.us](mailto:COL119@henrico.us)

### **ACKNOWLEDGEMENT:**

Signature: 

Print Name: Jeff\_Hartman

Company: Anthem Health Plans of Virginia, Inc./HealthKeepers, Inc.

Date: May 10, 2023

**RFP No. 23-2515-4LOC**

**Employee Assistance Program**

**Questions & Answers**

**April 26, 2023**

1. Will the County accept electronic signature in lieu of a wet signature?

Answer: Yes.

2. Would the County prefer to stay as a 'Fee For Service' or would the County be open to a 'Per Employee Per Year'?

Answer: The County will accept proposals for both and will make the most reasonable and economical decision.

3. Why is the County currently going out to RFP?

Answer: The current Contract ended with no additional renewal periods.

4. Who is the current Employee Assistance Program (EAP) provider and how long have they been serving the County?

Answer: The current provider is Optima Behavioral Health Services Inc. and they've had the contract for 10 years.

5. On a scale of 1 to 5, how satisfied is the County with your current provider?

Answer: 2.

6. Our Company provides Per Employee Per Month (PEPM) pricing vs. "per session"/utilization model price. Would the County accept PEPM pricing format?

Answer: Yes. The County will evaluate PEPM pricing based on the services offered and the overall cost comparison.

7. Would the County like a bank of time included in your rates (critical incident response, health fairs, seminars, etc.) or should those be kept separate as hourly fees?

Answer: Either way would be accepted. Offerors shall note if bank of time is included in their rates or provided separately.

8. Is the County looking for an insurance EAP provider or a standalone/full service EAP provider?

Answer: The County will consider both options.

9. Our company operate under a provider network model and can provide a network report around your zip codes. We can provide a 50 mile geo report around zip code 23273. Would this suffice? If not, please provide specifics around provider network report requests?

Answer: Yes, with the ability to potentially go outside the 50 miles for convenience to employee residences.

10. Per the solicitation detail, there are approx. 4200 general government employees and approximately 6400 school division employees – Would this result in a total headcount of 10,600 employees + their household members? Please confirm total headcount.

Answer: The total headcount would be closer to 10,000 based on current number of HCPS employees.