

Proposal for North Boone CUSD #200  
GuidanceResources<sup>®</sup>

December 3, 2018

A photograph of a woman and a man in a meeting. The woman is in the foreground, looking towards the man. The man is in the background, looking towards the right. They are both wearing light blue shirts. The background is blurred, showing a window and some office equipment.

STAY AHEAD

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### Carboline Company

"We canceled our last EAP over a decade ago due to high cost and low utilization. In the last few years we have had employees increasingly bringing personal concerns to the workplace. We knew we needed to work with an independent, third party to assist us in reaching our employees in need. What sold us on ComPsych® are the professionals in the work-life department—they research resources for whatever our employees need. This allows our employees to be less stressed about their personal concerns and be more focused at work. Having this integrated work-life service also reduces the stigma surrounding an EAP and makes it easier for our employees to call in for help when more serious issues occur. So far, the program has been well received with strong utilization and very cost-effective services."

**Debbie Regnaud/Vice President of  
Human Resources and Corporate  
Services**

### About ComPsych, Dearborn's Partner in Providing EAP Benefits

Founded in 1984, ComPsych is the world's largest provider of employee assistance programs (EAP) and is the pioneer and worldwide leader of fully integrated EAP, behavioral health, wellness, work-life, HR, FMLA and absence management services under its GuidanceResources® brand. We serve 29,000 organizations, covering more than 78 million individuals throughout the United States and more than 130 countries. Our customers range from the Fortune 500 to smaller public and private concerns, as well as government entities and Taft-Hartley groups, with employers such as:

- |                     |                                    |
|---------------------|------------------------------------|
| > AIG               | > McDonalds                        |
| > Amazon.com        | > Sony Electronics, Inc.           |
| > Best Buy          | > The PNC Financial Services Group |
| > Colgate-Palmolive | > TE Connectivity                  |
| > DuPont            | > Tiffany & Co.                    |

ComPsych works with each customer to create build-to-suit programs that help employees improve their overall well-being and address the full continuum of life's issues—personal, family and wellness concerns. We help organizations foster high-performing work cultures that attract and retain the best and brightest, resulting in superior productivity and performance, and increased profits.

#### The GuidanceResources® Solution

ComPsych's GuidanceResources comprises [cutting-edge employee benefits that stand apart by comprehensively supporting employees across the broad spectrum of life's issues](#). We pioneered our unique brand, GuidanceResources, to seamlessly integrate employee assistance, behavioral health, wellness, work-life, crisis intervention and absence management services into a single solution that helps employees lead healthier and more productive lives.

ComPsych creates multifaceted, single-source solutions specific to each organization's culture and employee needs. Through our build-to-suit programs, employees experience integrated programs that contribute to the high-performance culture North Boone CUSD #200 seeks. GuidanceResources provides employees with information, resources and creative solutions that address personal life challenges and improve workplace productivity and performance. By choosing GuidanceResources, North Boone CUSD #200 will receive the highest quality, consistency and outcomes within an outstanding value proposition.

#### The EAP, Work-Life Partner of Choice

ComPsych's program for North Boone CUSD #200 stands apart from the competition in many ways: our industry-leading position, the breadth and depth of

experience, the scope of our services, our integrated program model and our flexible, build-to-suit approach.

Specifically, we offer North Boone CUSD #200 the following advantages:

- > **Highly Utilized and Cost-Effective Services**—ComPsych services are widely used and highly regarded. Across our book of business, ComPsych's average annual utilization rate for counseling services is six percent, exceeding the industry's standard of 3 to 4 percent. In addition, we track the annual utilization rate for work-life services, which include dependent care resources & referrals and legal and financial information & education. The average utilization rate for these services is an additional seven percent. When other forms of utilization are added—such as website usage, on-site CUSD services, and training sessions—ComPsych's average utilization increases to 20 percent and higher.
- > **Fully Integrated and Internally Staffed Services**—Our services address life's challenges, seamlessly integrating all services under one umbrella for a uniquely holistic experience. Employees can get help for emotional, legal and financial issues—without needing to call multiple vendors and repeatedly tell their story, all through one toll-free line. ComPsych's EAP, critical incident and work-life services are 100 percent internally developed and supported—with no outsourcing. Unlike our competitors, we do not subcontract any aspect of the EAP or work-life program.
- > **Flexible, Build-to-Suit Programs**—Rather than offering a standard plan design, ComPsych has the ability to customize different package options to reflect each customer's business needs. Packages can be customized to suit each customer's employee population/demographics/pre-existing or internal programs.
- > **High touch services**—From clinical EAP intake, personal work-life research and referrals as well as robust concierge services to responsive account management, ComPsych prides itself on providing high touch services. We also adapt outreach strategies and communication vehicles and customize program promotion materials to reach and engage diverse audiences.

### ComPsych's Spirit of Innovation

Perhaps our greatest differentiator is our spirit of innovation. ComPsych takes a holistic and integrated approach that is effective in resolving people's issues at the earliest and least costly stage. ComPsych continually looks for ways to remove barriers to accessing services and find innovative ways to reach and engage reluctant participants. Among the most impactful approaches used in the last year to improve EAP are: the creation of "on demand" online learning modules; the addition of a "chat" feature on our website; and the creation of condition-specific online community/message boards to connect users who have similar issues and concerns—most notably our Special Condition Portals (SCP) and online message boards on the topics of autism, elder care, healthy habits, bullying and maternity.

ComPsych welcomes the opportunity to serve North Boone CUSD #200 and are pleased to respond to outline our qualifications in this proposal.



### Program Components at a Glance

#### Broad Brush Services

Our EAP services encourage easy access for issues including:

- > Adapting to organizational change
- > Anger management
- > Anxiety
- > Behavior problems, including addictive behaviors
- > Blended and step family issues
- > Child and adolescent counseling
- > Chronic illness issues
- > Critical incident debriefing
- > Depression
- > Divorce counseling
- > Domestic violence
- > Effective parenting strategies
- > Family counseling
- > Financial questions
- > Geriatric and caregiver counseling
- > Legal questions
- > Loss and grieving
- > Stress management, including strategies for handling job stress and balancing home and work roles
- > Substance abuse counseling

Our program for North Boone CUSD #200 includes the following key features:

#### High Utilization

- > Better management of employees' personal issues, which can weaken job performance
- > Promotion materials, emails and articles that drive utilization
- > Account manager's analysis of reports and proactive recommendation of strategies to increase awareness
- > Workshops that address common employee issues
- > An average in-person EAP utilization (excluding work-life and website utilization) of 6 percent, exceeding the industry's standard of 3 to 4 percent

#### Responsive and Immediate Service

- > Dearborn National dedicated toll-free line can be used for any need—whether EAP or work-life
- > Clinicians with master's degrees greet callers immediately 24 hours a day, seven days a week
- > All callers offered a face-to-face appointment with a GuidanceExpert<sup>SM</sup> in our network
- > Resources cover a broad spectrum of issues that affect employees, ranging from relationships to stress and anxiety

#### GuidanceResources® Online

- > Award-winning, comprehensive online offering
- > Information, advice and helpful tools covering thousands of topics
- > Information on subjects such as health and wellness, family, relationships, career, education, finance, laws and regulations, leisure, home and auto
- > Information that is accessible by life event—for example, marriage, adoption or retirement
- > Confidentially email issues to Ask a GuidanceConsultant<sup>SM</sup>
- > Chat live with staff experts

#### FamilySource® Referral and Resources

- > Unlimited assistance for child care, adoption, education, elder care, pet care and personal convenience needs
- > Research, prescreening of all referrals and customized referral packets—all completed by in-house specialists
- > Online tools and information about family and personal issues

#### LegalConnect® Information and Referrals

- > Unlimited telephone access to our expert staff attorneys, who have experience in the practical and emotional aspects of legal concerns
- > Information tailored to each employee's legal needs
- > Referral to local Legal GuidanceExperts at a discounted rate

### ***FinancialConnect<sup>®</sup> Information and Resources***

- > Unlimited telephone access to certified financial specialists on staff at ComPsych
- > Information on household budgeting, financial planning and investments
- > Online access to contact information for qualified, certified Financial GuidanceExperts
- > Online tools and resources for common financial issues

### ***Critical Incident Support***

- > Crisis calls answered 24 hours a day, seven days a week
- > Strength, talent and experience of critical incident stress management (CISM) team
- > On-site, professional response to critical incidents
- > Local expertise in minimizing impact of critical incidents
- > Outreach calls to employees who do not feel ready to return to work, helping them to process their reactions
- > Available at any time to managers, no matter what the issue

### ***Management Support***

- > HR expertise and policy-based consultation for managers, supervisors and HR
- > Information provided professionally and within North Boone CUSD #200's HR policies and guidelines
- > Employee referral management
- > Information and tools to support employee performance issues

### ***The ComPsych Difference***

ComPsych's strengths are our commitment to our build-to-suit approach, EAP and work-life integration, extraordinary program utilization, face-to-face referrals and high-touch attention from account services through quality management. Adding ComPsych's services to North Boone CUSD #200's benefit plan will deliver true value to its employees and help North Boone CUSD #200's most valuable resource—its people.

### ***The ComPsych Experience***

In an industry where everyone appears the same on the outside, ComPsych's biggest differentiator comes from the inside—in the spirit of how we do business. Our staff exhibits our guiding principles, providing our customers with the ComPsych experience of:

- > A **passion for** and **dedication to** our customers and our work that is second to none
- > A **build-to-suit** approach of innovative, cutting-edge programs uniquely designed for each customer
- > A service orientation to always **over-deliver** on customer expectations
- > Impeccable **integrity**—demonstrated by our conduct in and out of the office

### The ComPsych Mission

ComPsych's mission is to embrace the challenges of today's workplace with a dynamic vision of the future. By providing organizations with cutting-edge solutions that attract and retain employees as well as improve employee productivity and performance, ComPsych offers significant cost savings and improved organizational efficiency.

Through constant innovation, relentless commitment to quality, unparalleled service and customer partnership, ComPsych stands alone as the leader in providing build-to-suit integrated GuidanceResources worldwide.

- > Demonstrated superior **quality** and **value** that forge long-term service relationships with our customers

ComPsych employees believe in what we do and are committed to delivering the highest quality of services to our customers.

### Summary

ComPsych leads the industry with cutting-edge programs that focus on employee wellness and productivity. We have been able to achieve double-digit growth, evidence of our commitment to deliver high-quality services. We choose to remain closely held, which translates into program flexibility and focus on our core lines of business. We stay abreast of trends and regulations, identifying valuable services for employers and employees.

As North Boone CUSD #200's partner, ComPsych will assist today's workforce and help North Boone CUSD #200 meet its vision for tomorrow.

For more information, please visit [www.compsych.com](http://www.compsych.com).



### GuidanceConsultants<sup>SM</sup>

ComPsych GuidanceConsultants are master's-level intake clinicians who will listen to employees' issues, assess their needs and refer them to specialists to resolve their issues. They have broad-based clinical skills and experience in assessing issues such as stress and depression, alcohol/drug use, suicide, emergency responses and work-life concerns.

## EAP Services

North Boone CUSD #200's employees and their family members can contact ComPsych with issues regarding behavioral and emotional health, family, legal, financial, wellness or other personal matters 24 hours a day, seven days a week, via the Dearborn National dedicated toll-free line, email and chat feature on GuidanceResources Online. We will conduct an issues assessment and direct the caller to the appropriate ComPsych GuidanceExpert<sup>SM</sup>—(network provider) and cross-refer as appropriate to an in-house attorney, financial professional or family research specialist for further assistance—all through a single point of contact.

Employees always reach our GuidanceConsultants<sup>SM</sup>, who are master's-level clinicians—never an answering service or an automated menu system. Our GuidanceConsultants are ComPsych employees who will listen to North Boone CUSD #200's employees' issues, assess their needs and refer them to specialists to resolve their issues.

### Guiding Employees to the Right Resources

Because most callers have not previously contacted an EAP service, our services go beyond intake and triage. We take the necessary time to educate callers on ComPsych's services. We engage them in the program, increase their comfort with our services and encourage program utilization.

These professionals have master's degrees in counseling, social work or other related behavioral areas. In addition, they have broad-based clinical skills and experience in assessing issues such as alcohol/drug use, suicide, emergency responses and work-life concerns. Our GuidanceConsultants have at least three years of experience, as well as training to provide support, facilitate immediate assistance and handle requests for counseling, family or personal convenience needs, legal information or financial information.

Our staff members speak multiple languages including Spanish, French, Italian, Polish, Arabic, Tagalog and others to accommodate multilingual, multicultural individuals. We also offer translation capabilities for more than 150 languages and maintain a 24-hour toll-free TDD line for hearing-impaired individuals.

As GuidanceConsultants talk to individuals, they will document details such as the following:

- > Presenting problem, symptoms and family history
- > Risk—individuals' thoughts of hurting themselves or others including plans, actions, history, potential victim
- > Alcohol/substance use—drug of choice, amount of use, use frequency, date of onset, date of last use, treatment history

- > Domestic violence—the most recent occurrence, the frequency and history, medical attention needed currently or in the past, police or legal involvement currently or in the past, safety plan
- > Current treatment—level of care, facility name and address, therapist name and phone number, medication and dosage
- > Psychiatric treatment history
- > Work or school-related issues—performance, attendance, peer relationships, unprofessional behavior, workplace violence

### Accessing the EAP with Ease

ComPsych believes in-person care is valuable, which is why we refer callers to in-person sessions. For routine matters, individuals can schedule an appointment in an average of three days. These routine face-to-face appointments are available six days a week.

If employees have an urgent request, we will provide care through a referral to a GuidanceExpert within 48 hours.

During emergency calls, ComPsych's GuidanceConsultants use their crisis intervention skills to implement crisis protocols immediately. They coordinate face-to-face services with a hospital emergency room or an EAP GuidanceExpert.

ComPsych's staff telephone counselors can assist if employees need counseling, but cannot or do not want to schedule a face-to-face visit because of their schedules, a lack of child care or transportation, or an illness or injury. Telephone counseling involves the same procedures as in-person counseling, including assessment and treatment.

### In-Person Counseling and Follow-Up

Rather than build our network on contingency, ComPsych has structured it to accommodate the needs of our existing customers. This way, our GuidanceExperts regularly receive referrals, and their active participation deepens their understanding of our EAP services.

During in-person counseling sessions, GuidanceExperts will:

- > Evaluate the individual's situation and symptoms
- > Work with the individual to identify the primary issue and set achievable treatment goals
- > Determine an appropriate treatment plan

GuidanceExperts will typically evaluate individuals during the first and second sessions and treat them in the remaining ones. If necessary, they will recommend ongoing treatment under the medical plan or through community resources, and help with the transition.

### GuidanceExperts<sup>SM</sup>

ComPsych GuidanceExperts<sup>SM</sup> are counseling and work-life specialists, attorneys, financial professionals, training facilitators, health coaches, and crisis experts. GuidanceExperts provide in person, telephonic, or video counseling (depending on availability and caller preference), and have expertise in areas such as: adolescents and children; anxiety disorders and depression; domestic violence; marriage and families; stress management; and substance use.

ComPsych uses the professional judgment that comes from deep experience to monitor care throughout the process, from initial intake through post-care satisfaction surveys.

For routine referrals, ComPsych will contact the employee within two days of the first call to make sure a suitable appointment was available. For urgent and emergency cases, we will follow up within one day. During any call, we encourage the individual to follow through with our referral recommendation.

We want to know what North Boone CUSD #200's employees thought of their experiences, so we will send surveys via email (with employee permission) within 30 days.

#### ***Pinpointing GuidanceExperts and Resources***

During intake calls, our GuidanceConsultants will match employees with a local GuidanceExpert. Using our proprietary system, we will use GuidanceExperts' specialization, geographic accessibility, cultural considerations and the caller's stated preference (for example, for a female counselor) to pinpoint a suitable GuidanceExpert. GuidanceConsultants can either give employees the office location and phone number or transfer them directly for appointment scheduling. ComPsych will contact GuidanceExperts within four hours of an initial request to inform them of the referral and employee information.

#### **High Resolution within the EAP**

Our best practices for network management and quality oversight of GuidanceExperts produce high-quality care for employees. As available sessions increase, employees see the value, and more of them participate in the EAP, according to our research. In addition, as more employees participate, more issues are resolved within the EAP, without referral to costly medical plans.

Program Model	EAP Resolution	Medical Plan Referral
3-visit	67%	33%
5-visit	81%	19%

#### ***Community Resource Referrals***

While ComPsych's EAP covers a broad range of issues, we recognize that community referrals may help those who need more-specialized or sliding-scale resources.

If employees do not have insurance coverage and need to continue treatment, we will refer them to a community behavioral health center that uses a sliding scale to charge for treatment.

For employees who need a supportive environment, we may recommend that they attend meetings sponsored by organizations such as Alcoholics Anonymous, Gamblers Anonymous, Narcotics Anonymous or Al-Anon/Alateen. In domestic violence cases, we will refer the individual to an agency that provides referrals to local shelters and legal assistance.

We may also refer individuals to associations and organizations that offer free resources and support.

#### *Health Plan Coordination and Vendor Integration*

In the small percentage of cases that cannot be resolved within the EAP, such as when long-term or specialized care is needed, GuidanceExperts will consult with ComPsych clinical care reviewers. Together, GuidanceExperts and clinical care reviewers will examine the diagnosis, treatment plan, employee motivation and support system. Using a comprehensive assessment and information about employee benefit plans, they will identify appropriate and cost-effective treatment for the individual.

Clinical care reviewers offer expertise, workplace sensitivity and an employee-centered perspective, while recognizing that health plans are ultimately responsible for determining employees' level of care. ComPsych objectively recommends appropriate care for individuals and is not financially affiliated with any GuidanceExpert, group or facility.

A primary objective for North Boone CUSD #200 during implementation is to coordinate ComPsych's program services with your other benefit programs to ensure optimal usage of all resources. During implementation, we will enter benefit information into our database and establish cross-referral protocols. During intake, GuidanceConsultants will have access to knowledge of North Boone CUSD #200's medical, disability, wellness and other benefit information.

As a standard part of our EAP services, ComPsych proactively coordinates with our customers' benefits vendors including the behavioral health care provider, the medical carrier, the disease management vendor, the wellness vendor, the disability carrier, group life insurance, FMLA administration and the pharmacy management vendor. Using the EAP as a central hub provides a clinically-focused approach that can help address short-term issues before they spur more costly benefits such as health care and disability. We promote and encourage use of the EAP to address issues at the earliest point—before they become problems. This

ensures that we are supporting the productive, healthy population so that they remain upstream of problems and minimize referral to costly health plans.

When an EAP case has a medical component, ComPsych will coordinate care between primary care physicians and health plan managers to encourage information-sharing. Our clinical care reviewers will communicate with primary care physicians (with employee permission) regarding the treatment plan. We also encourage primary care physicians to contact the treating GuidanceExpert with questions or concerns about the treatment plan.

For example, an employee undergoing treatment for a medical condition such as cancer may require individual and family counseling to address the emotional effects of the condition. When a case has medical and psychosocial aspects, GuidanceExperts will coordinate care to focus treatment on the individual's physical and emotional needs.

#### **Network Reflects Customer Needs**

We build our network to mirror the needs of customers, adding GuidanceExperts where customers' employees live and work. Because we do not over-build our network, our GuidanceExperts regularly deliver care through our programs. This promotes their familiarity with our EAP services and standards, enhancing the quality of care provided to individuals.

ComPsych's network includes only ComPsych-credentialed, state-licensed clinicians with expertise in areas such as:

- > Adolescents and children
- > Anxiety disorders and depression
- > Domestic violence
- > Marriage and families
- > Stress management
- > Substance use

We can match the needs of North Boone CUSD #200's employees with GuidanceExperts who speak the same language and have the same culture. Our current network includes GuidanceExperts who speak more than 75 languages. Additionally, we have GuidanceExperts who can assist hearing-impaired individuals.

Our current network covers a broad geographic range and is continually expanding.

#### **GuidanceExperts Meet Rigorous Credentialing Requirements**

ComPsych's credentialing process includes reviewing malpractice claims, pending legal cases, license actions and sanctions by Medicare or Medicaid. In addition, we verify that GuidanceExperts have expertise in specialties essential to EAP, such as critical incident support and management referrals.

To be admitted to our network, a GuidanceExpert must possess the following minimum criteria:

- > A master's degree in a behavioral health-related field and a doctorate for psychologists
- > A license to practice in the state at the highest level of independent license granted by the state licensing board
- > Three years of post-graduate experience
- > Malpractice insurance (\$1 million per occurrence/\$3 million aggregate)
- > Advanced education in a related specialization—for example, substance use, children or eating disorders
- > Willingness to participate in ComPsych's quality oversight and assurance programs

### ***Biannual Re-credentialing***

ComPsych's network services department re-credentials all GuidanceExperts every two years, exceeding the requirement of the National Committee for Quality Assurance to re-credential every three years. Through this process, we:

- > Verify current license and certificate of insurance
- > Examine any malpractice claims or licensure actions
- > Analyze clinical care reviewer documentation from quality oversight activities
- > Review composite individual satisfaction survey and performance review results

Once our network services specialists have performed these tasks, our credentialing committee will meet monthly to review all candidates for re-credentialing or inclusion into our network. The committee comprises directors of network, clinical and GuidanceResources services; ComPsych's medical director; and privacy and clinical managers.

We also regularly review and oversee quality and ask GuidanceExperts for feedback about our quality oversight policies, referral process and claims management. Their responses help us to improve our GuidanceExpert-focused services.

### ***Responding to Critical Incidents***

ComPsych's 24-hour critical incident department deals exclusively with events such as natural disasters, fatal accidents and corporate restructuring. Our specialized team will consult with managers, helping them to develop an action



### Critical Incident Expertise

ComPsych responded to more than 3,600 events in 2014, 85 percent of which resulted in on-site debriefings. In total, more than 3,000 separate on-site debriefings were arranged.

Incidents included:

- > Massive landslide in Arlington, WA
- > Robberies
- > Police and school shootings
- > Major mall shooting rampage
- > Workplace accidents and injuries
- > Employee deaths
- > Downsizing and layoffs
- > Massive IT security breach
- > Civil unrest in Ferguson, MO

plan, facilitating on-site services, if necessary, and conducting follow-up calls with affected parties. On-site CISM services are available on a fee-for-service basis.

We can deliver our critical incident stress management (CISM) services for groups of employees or individuals affected by a critical event. CISM services aim to reduce the likelihood of long-term psychological consequences because of trauma caused by the event. The sessions offer support, normalize trauma responses and help employees manage the symptoms.

We can provide on-site critical incident services within hours if needed. Our experience shows that CISM services are most effective two to three days after the incident, when the shock has subsided and the employee can better identify psychological reactions to the event.

Group sessions last approximately two hours and can be conducted separately for North Boone CUSD #200 employees and managers. During the session, the crisis GuidanceExpert moves the group or individual through a discussion of their reactions, coping mechanisms and recovery strategies.

#### *Expert Consultation Available Immediately*

ComPsych has a team of critical incident specialists on staff round-the-clock to consult and support managers when natural disasters, fatal accidents, deaths and large scale crises occur. This is an important distinction when comparing vendors—many competitors outsource important services such as work-life and critical incident services. When North Boone CUSD #200 managers and supervisors are concerned about a situation or their teams are experiencing stress related to a traumatic event, ComPsych's critical incident department is available immediately. A critical incident services coordinator will gather information about the incident and provide immediate phone support. If on-site services are needed, the coordinator will arrange for a Crisis GuidanceExpert to be at the site.

#### *Specialized Support for Managers*

ComPsych's CISM department can provide specialized support to managers during and after critical events. We can help them to apply practical intervention techniques to give their staff and themselves a greater sense of control and reduce stress that can manifest as confusion and defensiveness.

Our practical guidance addresses:

- > Talking and listening to staff about how they are coping
- > Identifying and prioritizing assistance for employees who most need help
- > Educating managers on post-trauma symptoms, CISM sessions and outcomes
- > Organizing crisis staff and scheduling CISM sessions
- > Linking managers to local crisis resources

- > Reinforcing the benefits of EAP and counseling services
- > Reminding managers to address their own stress

ComPsych's crisis service will also help customers, like North Boone CUSD #200, to plan for emergencies and can provide on-site assistance to support employees and families. Our account managers will even proactively offer help to a customer that may be affected by a publicized critical incident.

### **Expert Management Consultation**

ComPsych offers expertise with issues like substance use, compliance with the Americans with Disabilities Act and other government regulations, workplace violence and organizational re-engineering. If North Boone CUSD #200 needs support for an employee issue, a ComPsych employee relations specialist can provide it, working from extensive knowledge of and experience with workplace regulations and best practices. Our services to North Boone CUSD #200 will reflect your HR policies and procedures. Many customers that have used this service have commented on the value of an objective third party's perspective on a sensitive situation.

### **Management Referrals**

When North Boone CUSD #200 needs to refer employees to the EAP, ComPsych's formal referral specialists will assist managers or HR professionals throughout the process. Referrals can be either voluntary or formal:

- > Voluntary referrals—an employee comes to his or her manager with an issue or a manager identifies an issue during initial discussions regarding performance and discipline. The manager reminds the employee that the EAP can assist him or her, and the employee's use of the EAP is optional.
- > Formal referrals—a manager directs the employee to use EAP services after informing him or her that performance or behavior issues are hindering productivity or a policy such as drug-free workplace has been violated. Managers formally refer employees after taking disciplinary steps.

We recommend that before meeting with the employee to make a formal referral, the HR manager and the manager contact the EAP. We will discuss the referral process, provide a consent form for release of information and agree to a timetable for informing HR of the employee's attendance, progress and compliance with the treatment plan. Because of the need for confidentiality, we do not disclose clinical and/or personal information.

We receive excellent ratings on our formal referrals—100 percent for response time and 99 percent for overall experience with our service.

### **Substance Use Assessment Services**

### **Program Differentiator – Easy Access for Management**

Managers access services through the same toll-free number as employees; we immediately warm transfer callers to the appropriate unit.

Substance use affects employee productivity, compromises the quality of work and increases the risk of work-related accidents. ComPsych can help customers like North Boone CUSD #200 to tackle those problems through our EAP substance-use services. Furthermore, ComPsych offers comprehensive services to assist with substance use training and education, development of policies and procedures, and compliance with government regulations such as the Drug-Free Workplace Act and Department of Transportation regulations.

During implementation of our services, your account manager will review drug and alcohol policies and procedures, and formal referrals. The account manager will also clarify the referral process regarding government regulations that could affect your policies.

#### *Drug-Free Workplace Program Workflow*

Once an employee tests positive for illegal substances or alcohol, the HR manager can contact the ComPsych's GuidanceResources unit to initiate the formal referral process and, if needed, consult with the formal referral specialist (FRS) who oversees the case.

When the employee calls, the GuidanceConsultant will explain the referral process, gathers information about drug/alcohol use, and refer the caller to a local specialist for a substance-use assessment. Employees can use a toll-free number to contact ComPsych 24 hours a day.

Our services are strictly confidential. ComPsych can communicate with the employee representative only after the employee signs a release of information form provided by ComPsych. Upon referral, we will contact the GuidanceExpert to confirm that an appointment can be scheduled within three business days and to provide complete referral information and contact information for the FRS who will oversee the case.

During the initial appointment, the GuidanceExpert will conduct a substance use assessment, recommend treatment and refer the employee to the most appropriate level of care. Once the employee enrolls in the treatment program, the ComPsych FRS will follow up regularly with the treatment GuidanceExpert regarding the employee's compliance with treatment recommendations. When treatment is complete, an after-care plan is developed if needed. The ComPsych FRS will notify the North Boone CUSD #200 representative of the employee's progress and compliance, and any after-care recommendations. North Boone CUSD #200's HR manager will make the final decision regarding the employee's duties after return to work.



## Work-Life Services

Through ComPsych's fully integrated GuidanceResources program, we offer support and resources for family, legal and financial issues, as well as our EAP and CISM services. Our holistic approach encourages employees to access the program. This, in turn, can reduce problems before they manifest as lost productivity, absenteeism or increased health care claims costs.

### Program Differentiator – Holistic Triage

During intake and assessment, the GuidanceConsultant can immediately connect the caller to a ComPsych work-life specialist, lawyer or financial expert for further assistance.

Our integrated service approach enables our GuidanceConsultants to seamlessly transfer calls regarding EAP services to our in-house lawyers and financial professionals, if appropriate. For instance, a caller who seeks EAP sessions regarding a divorce may benefit from talking to a ComPsych staff lawyer or financial professional about related issues. The GuidanceConsultant will “warm transfer” the call, sharing the background information with the lawyer or financial professional so that the employee does not need to repeat the facts about the situation.

Consequently, employees who call for support on a legal, financial or family matter often end up being more comfortable accessing EAP services when they need them.

With one phone call, employees and their family members can access the resources they need to handle complex issues instead of spending work time tracking down information and experts. As a result, North Boone CUSD #200 will reap the benefits of more-focused, productive employees.

Our work-life services include the following:

- > Assistance through an unlimited number of phone calls regarding child and elder care, adoption, education, pet care and personal convenience needs
- > Research, prescreening of all referrals and customized referral packets prepared by in-house resource specialists
- > Assistance through an unlimited number of phone calls to our staff lawyers and certified financial specialists
- > Referrals to local legal and financial GuidanceExperts at discounted rates
- > Online tools and information

Our resource specialists research family care and personal convenience matters. They have at least a bachelor's degree as well as relevant work-life experience—for example, in teaching, child care or elder care—and research skills.

### Family and Personal Convenience Services

Major stressors often arise from milestones such as beginning college, getting married, moving, having children or caring for an aging parent. With ComPsych's FamilySource®, North Boone CUSD #200 employees and their family members

can call our GuidanceConsultants for an initial assessment and consultation. Then, our resource specialists will provide a packet of customized, timely referral information and educational literature.



**Giant Eagle, Inc.**

"The GuidanceResources® program referred to as Life Resources at Giant Eagle is so very different from what we had offered from a previous vendor. We were excited to offer more resources to our team members, such as financial, legal and concierge-type services. We also increased the counseling component to six sessions per issue per year. We feel this more robust program has led to a significant increase in utilization—37 percent for EAP/work-life, compared to 15 percent previously."

"We have received a lot of very positive feedback from our Team Members who have used the program repeatedly. In fact, we are launching a communications campaign highlighting Team Member testimonials about the care, support and help they have received from GuidanceResources."

I couldn't speak more highly of our account manager and the ComPsych® team. They are very responsive, have taken a great interest in what we do and have incorporated other Giant Eagle resources into the process when Team Members call. The program has been 'smooth sailing' since day one."

**Melanie Toback, Health & Wellness  
Administrator**

North Boone CUSD #200 employees can call an unlimited number of times regarding the same or different issues related to child and elder care, adoption, education, pet care and personal convenience needs. Additionally, employees can access information at GuidanceResources® Online.

**Personalized Referral Packets**

ComPsych's FamilySource® referral packets include the following:

- > Local referrals
- > A map, directions and the distance from the caller's home and/or office
- > The terms and definitions for options related to their concern, such as
  - o Housing and support services for seniors
  - o Child care choices including in-home day care, group day care, day care centers, nanny services, preschool and Montessori schools
  - o Personal convenience services such as resources for home improvement, car buying, moves and wedding planning
  - o Wellness options for issues such as smoking cessation and weight management
- > The caller's state-specific licensing standards for GuidanceExperts/facilities
- > Applicable HelpSheets, which are ComPsych printed information sheets
- > A checklist that can help the employee to evaluate the services of a GuidanceExpert or facility
- > An individual satisfaction survey

We will send the packets to employees by the method they prefer—email, traditional mail or fax—within two business days. We handle urgent requests to help with needs such as shelter, food, or utilities immediately.

ComPsych's resource specialists use technology and conventional research to quickly compile current, customized referral information. We will provide three to five local referrals and resources and information relevant to the individual's concern. Our resource specialists call each referral source to ensure availability and a match with individuals' criteria. Within 48 hours and then again five days after a referral, ComPsych will follow up with the individual to ensure that the information met or surpassed their expectations. Collecting feedback ensures our referral integrity.

Based on employee need, we also supply helpful kits, which contain information and products related to topics such as pregnancy, adoption, retirement, elder care, pet care and fitness.

### Supporting Employees with Legal Services

ComPsych's LegalConnect® legal assistance program will provide North Boone CUSD #200 employees with access to our in-house team of dedicated attorneys. LegalConnect covers all legal issues except employment-related matters and is immediately available to all employees and their family members. Employees can make an unlimited number of phone calls per issue on an unlimited number of issues.

Our lawyers are dedicated to providing legal information, education and resources. These attorneys do not perform other types of work for ComPsych or other employers. When individuals call, our lawyers will provide insightful coaching and guidance to help individuals address their unique and challenging needs. In many cases, our attorneys will research local information and send it to individuals to provide a more complete and valuable service. In addition, ComPsych has developed a rapid response process whereby individuals can speak with one of our licensed attorneys in as little as 10 seconds after making their call.

Individuals can obtain information on issues such as:

- > Bankruptcy
- > Contracts
- > Credit
- > Estate planning
- > Identity theft
- > Real estate
- > Wills

When individuals need legal representation or advice, we will refer them to one of our local Legal GuidanceExperts. Lawyers who belong to our network offer a free 30-minute consultation and a 25 percent reduction in fees thereafter.

To participate in ComPsych's network, attorneys must be licensed and in good standing with the state bar, have at least five years' experience and have no record of public discipline. ComPsych re-credentials our Legal GuidanceExpert Network annually.

### Financial Experts Answer Employee Questions

ComPsych's FinancialConnect® financial services program, enables employees and their family members to call our financial experts an unlimited number of times about an unlimited number of issues.

Our financial services cover a broad range of issues, including:

- > Credit issues

## Best Buy

“Our Geek Squad service center has more than 1,000 employees and there isn’t a day that goes by we don’t hand out your company’s business card, flier or magnet. We have received wonderful feedback from employees who have utilized ComPsych’s services.”

“We absolutely love the website, especially when employees need some type of guidance regarding an issue they are going through but are not quite ready to speak to someone about, by phone or in person. It is a great resource for us and for our employees. I access the website very often!”

**Lisa Asher, HR**

- > Debt and bankruptcy
- > Family budgeting
- > Insurance options
- > Investment options
- > Money management
- > Mortgages, loans and refinancing

Our experts are certified public accountants (CPAs) and certified financial planners® (CFPs®). Our personal finance professionals must have a college degree, professional certification and financial planning experience.

## Online Tools a Click Away

In addition to obtaining help through the toll-free line, North Boone CUSD #200 employees will have information, advice and tools at their fingertips through ComPsych’s GuidanceResources® Online. They can learn about subjects such as health and wellness, family, relationships, career, education, personal finances, laws and regulations, leisure activities, home repair and auto maintenance. They can also access information by life event—for example, marriage, adoption or retirement. In addition, employees can confidentially email issues to “Ask a GuidanceConsultant<sup>SM</sup>” and use the chat feature to access services and ask questions.

ComPsych has an in-house team that creates proprietary content for GuidanceResources® Online. Team members also leverage partnerships with industry leaders to populate the site with news stories and articles written by experts. The “Hot Topics” area on the homepage features relevant and timely articles about issues that employees may be facing.

Individuals can view the site in multiple languages. GuidanceResources® Online content includes:

- > Interactive tools and assessments such as financial calculators, budgeting spreadsheets, language translator and personal issue quizzes
- > Customized child care provider/facility lookup and mapping for more than 500,000 resources by location and preference, availability verification based on specific criteria
- > Comprehensive elder care facility lookup by location, with ratings and rankings research, and current availability and information on more than 100,000 providers
- > Information regarding colleges and universities, career schools, graduate programs, scholarships and testing information; searchable by detailed criteria
- > Attorney resource lookup and mapping by ZIP code and proximity for more than 6,300 firms and 15,000 practitioners
- > Link to economically create simple, legally binding wills

## GuidanceResources Online Awards



- > Financial planner lookup and mapping by ZIP code and proximity for more than 18,000 financial professionals
- > Discounts through partners such as DirectTV and VPI Pet Insurance, as well as access to a robust, members-only discount portal, Working Advantage.
- > On-demand training modules that are an alternative to traditional full-length training sessions. These online learning modules are brief in length and include audio, video and interactive components. Examples of on-demand training topics include *Stress - A Way of Life or Fact of Life?*, *Managing Personal Finances*, and *Time Management Tools & Principles*.
- > Special Condition Portals and Communities for issues such as autism, elder care, healthy habits, bullying, maternity and more. These community hubs include "Resources for Caregivers and Loved Ones"; Videos, HelpSheets and Links to External Resources. For example, the autism hub includes topics such as: "What are Some Common Signs of Autism Spectrum Disorder?" and "Is Autism Spectrum Disorder Inherited."

### Secure and Customized Access

GuidanceResources Online is password-protected to ensure a confidential online experience unique to the user.

### Ask a GuidanceConsultant

Employees who prefer the anonymity of the Internet or are otherwise reluctant to call the designated toll-free number can also obtain information or answers to questions through our email option. Through this service, called "Ask a GuidanceConsultant<sup>SM</sup>", employees can send an email from the GuidanceResources® Online site. An expert will respond via email.

### Crisis Support

When a crisis emerges, ComPsych will provide North Boone CUSD #200 and its employees with timely information. The alert section on the GuidanceResources® Online home page provides breaking news and information on health crises, natural disasters and other regional events that can affect North Boone CUSD #200 and your employees and their family members.

Users can log on to the site for the following updates:

- > Evacuation routes
- > School and road closures
- > Open child care centers and gas stations
- > Government alerts
- > Safety-related informational HelpSheets before, during and after a disaster
- > Links to other online resources

In addition, customers can opt-in or state that they want to receive special news announcement emails.

One visit to the site shows employees they can rely on the site as a one-stop resource for the latest updates during a major local or national crisis.

#### ***GuidanceResources Online for Mobile Devices***

Our mobile version of GuidanceResources Online, GuidanceResources® Now, enables users to browse content (HelpSheets, Assessments, Q&As, podcasts, etc.) and news articles by topic, as well as find local legal, child care and elder care providers. In addition to enabling one-click capability to reach our call center, via the North Boone CUSD #200-dedicated phone number, users can also access mobile-specific features such as click-to-call (to dial a phone number) and location-based mapping.

#### ***GuidanceResources Online Chat***

ComPsych has developed online Chat functionality, accessible through our proprietary web-based information and resources portal, GuidanceResources Online. Our Chat functionality is staffed by ComPsych's intake staff, who are all highly trained master's-level clinicians. Chat provides a quick and discreet way for employees and their family members to receive referral information and services. Chat is conducted in real-time, meaning employees and their family members can receive the help they need immediately. You can also be confident that all chats with our intake clinicians are kept private as ComPsych adheres to the highest levels of confidentiality and privacy standards, including HIPAA and Safe Harbor.

## How We Serve North Boone CUSD #200

Our core business is developing and supporting EAP and work-life services. As a result, all ComPsych employees—from our executive team to GuidanceConsultants—focus on delivering high-quality care for employees without distractions from other business sidelines.

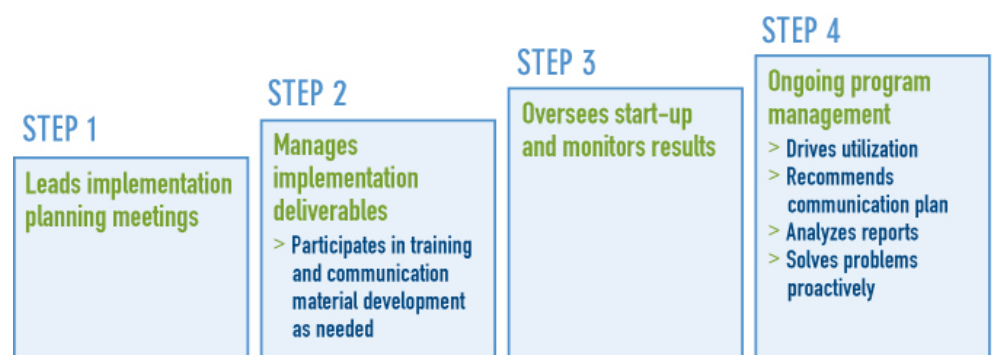
Starting from the initial intake call, the GuidanceConsultant will make sure our service has been satisfactory by asking, “Have I addressed all your concerns? Is there anything else I can do to help you before we hang up?” These questions ensure that we never rush a caller off the phone, and that the caller’s experience starts positively.

### Account Managers Drive Program Results

ComPsych will designate an account manager to North Boone CUSD #200. S/he plans, implements, coordinates, communicates and reports outcomes for your program.

#### Implementation

The account manager assigned to North Boone CUSD #200’s program will be your main contact from implementation throughout the relationship. An expert in managing EAP and work-life services, the account manager will ensure that the implementation is successful. The following graphic highlights the account manager’s activities during each phase:



#### Ongoing Program Management

Account managers oversee all program deliverables, such as communication materials, training and reporting. They will maintain contact with North Boone CUSD #200 throughout its program.

North Boone CUSD #200 will also receive our quarterly newsletter, ComPsych Newsline<sup>SM</sup>. It will include e-briefs, invite you to attend webinars on topical issues, and provide HR executives and staff with benefit and behavioral health information they can use.

### Montgomery Co., Maryland

“We have a diverse population – 14,000 employees spread across 70 facilities and everything from office workers to bus operators and warehouse employees. We wanted collaboration and coordination between the EAP and wellness, addressing the emotional and mental health side of wellness, so we switched from a local provider to ComPsych.”



### Training Sessions Increase Awareness

We are committed to informing employees about the GuidanceResources® program so that they will use and benefit from the program. To support this goal, North Boone CUSD #200 will have access to our comprehensive training services on a fee-for-service basis. Our average satisfaction rating for these training sessions is high: 4.5 out of 5.

ComPsych offers the following types of training:

- > Employee orientation
- > Manager/supervisor orientation
- > Personal development workshops: behavioral wellness seminars, brown bags or lunch and learns

During implementation, we will discuss specific training requirements and build a program to suit your needs.

### Orientation Sessions

ComPsych offers separate sessions for employees and management, since each group may interact differently with our service. Employee sessions focus on program benefits and features, while management orientations include how our referral processes work and how the EAP complements management strategies.

Employees: The 30-minute employee orientation sessions cover topics such as:

- > Program history, background and purpose
- > Access to the benefit
- > Employer-specific services
- > Reminder that there is no cost to employees and their family members
- > Issues that can be addressed by GuidanceResources and work-life services
- > Assurance of program confidentiality

These orientation sessions can be adapted to a wide variety of audiences.

Managers and supervisors: orientation sessions discuss how to use the EAP to support employees and maximize their productivity. ComPsych's program helps managers identify troubled employees and encourage them to seek help.

The one-hour sessions cover topics such as:

- > Types of issues and problems addressed by GuidanceResources®
- > Issues that can affect productivity and advice on focusing on behavior and performance instead of personal issues
- > Process for accessing critical incident response services
- > Formal versus voluntary referrals and advice on making a timely, tactful referral

We supplement this training with guides for managers and supervisors, which cover topics such as organizational benefits, the manager's role in the EAP, referral methods and steps to effective management performance. We will provide North Boone CUSD #200 managers and supervisors with an electronic copy of these training manuals.

### ***Workshops for Behavioral Wellness and Personal Development***

Once orientation sessions lay the foundation, North Boone CUSD #200 can use personal development workshops and behavioral wellness seminars to add depth and interest to our GuidanceResources® services. ComPsych offers training to help employees manage daily challenges including managing emotions in the workplace and balancing work and life responsibilities and goals. More than 100 topics are available.

### ***Professional Facilitators Conduct Training***

All ComPsych training content is written by professional trainers who hold advanced degrees in communications, adult learning, training and development or organizational behavior. The topics are designed to accommodate all types of adult learning styles, as well as to be presented to a variety of audience types.

ComPsych has a panel of more than 1,850 contracted facilitators to ensure local coverage for training sessions. These facilitators include counselors, professional trainers and financial experts; we screen these facilitators for their experience before they become members of the panel. In addition, our professional staff coach individual facilitators before they facilitate a session for ComPsych.

### ***Options for Delivering Training***

Four training formats are available for training delivery. North Boone CUSD #200's preference and circumstances will determine their use.

- > **Face-to-face delivery**—our local facilitators can conduct the personal development/lunch-and-learn sessions, as well as employee and manager/supervisor orientations to GuidanceResources services.
- > **Remote delivery**—for groups and individuals in different locations, ComPsych offers employee and manager/supervisor orientation sessions online. In addition, we can offer most personal development/lunch-and-learn topics via live webinar or teleconference.
- > **Train-the-trainer delivery**—if North Boone CUSD #200 wishes to have your local HR or benefits staff facilitate employee orientation sessions either to new hires or as a review, ComPsych can help your representative prepare to conduct these sessions. We will supply you with the PowerPoint presentation and coach your staff on the main points of the content and advise them on effective facilitation.
- > **On-Demand Training**—Users can also access On-Demand Learning Modules through GuidanceResources Online at any time at no additional cost. These 5-

## **ComPsych's Award-Winning Communications**

ComPsych's creative communications, designed by our own in-house creative services department, have won numerous awards including the following:



10 minute podcasts cover our most frequently requested topics in a user-friendly interactive format that includes quizzes and engaging questions.

### **Communication Drives Utilization**

The national norm for EAP utilization is three-to-four percent. ComPsych averages six percent, substantiating that a significant number of employees use our services. This produces a significant return on investment for our customers. We encourage EAP and work-life utilization without charging additional fees or limiting program services.

### ***Creative Communication Strategies Drive Awareness and Engagement***

ComPsych's goal is for complete employee awareness of the GuidanceResources program. We work toward these goals by integrating print and electronic communications, which can be fully customized for customers and complimented by other engagement tools—such as GuidanceResources Online, employee and manager learning programs (trainings), and onsite support of health fairs and other events.

During program implementation, your ComPsych account manager will work with North Boone CUSD #200 to develop an employee and leadership communication strategy. Our tailored programs are designed to ensure a successful program launch, maintain high utilization, and provide relevant information to your employees when they need it most. North Boone CUSD #200's program will include the following communication efforts:

- > **Program Launch Campaigns:** Launch communications are designed to introduce employees and managers to the GuidanceResources program and its many benefits. They also present important information regarding eligibility and the confidential nature of the program. Communication vehicles may include posters, brochures, wallet cards and email campaigns, and will highlight all program features from clinical counseling, to legal, financial and work-life services. It is important that participants know that GuidanceResources is more than just counselling, and that it has something for everyone.
- > **Ongoing Engagement Tools:** ComPsych will continually support North Boone CUSD #200's GuidanceResources program with a steady stream of topical communications to keep the program top of mind for employees. During implementation, we will develop an annual communications calendar around specific needs, promoting engagement and driving utilization by addressing your employees' most pressing issues. For example, January's campaign topic might be elder care, where we would provide a series of posters, Helpsheets and employee trainings tailored to individuals dealing with elder care issues, while February might focus on financial wellness or child care, and so on. Our campaigns are supported by the more than 120 personal development workshops and behavioral wellness seminars made available to customers, along with our best-in-class, self-service, on-demand training modules. These brief interactive online modules include titles such as *Stress - A Way of Life* or

*Fact of Life?, Managing Personal Finances, and Time Management Tools and Principles.*

- > **Themed Communication Campaigns:** ComPsych's highly responsive programs include the development of standalone campaigns tailored to the specific needs of each customer. For example, for customers going through change and/or reorganization, we have developed customer-specific resiliency and mindfulness training programs and Helpsheets. For customers seeking to improve organizational efficiency, we have delivered campaigns around thoughtful time management. ComPsych can also develop campaigns based on the top presenting issues among employee populations, top requested work-life resources, or industry trends around employment, behavioral health and work-life balance.

All of our communication strategies, campaigns and resources can be easily integrated into existing internal communication schedules and calendars, or can be rolled out as standalone plans. Our program rates include the cost of producing our standard communication materials in English. However, we also offer materials in different languages to support our multilingual customers.

### **Detailed Reports and Analysis**

North Boone CUSD #200 will receive reports including data on utilization and presenting issues, with metrics. ComPsych's reports contain the following information:

- > All services requested
- > Organizational trends
- > Demographic data
- > Utilization trends
- > Intervention and promotion strategies
- > Recommendations for program direction

Our reports will support your efforts to gain the most value from your benefits investment. The ComPsych ResourceCenter—HR portal—offers online access to up to two years of utilization reports.

### **Confidential Services Contribute to Usage**

For the program to be used, your employees must be confident that their confidentiality will be preserved. This protection of confidentiality is ingrained in the way ComPsych GuidanceConsultants work. For example, if employees hesitate to provide their names, we do not press them unless an in-person referral is needed. We ask employees if we may conduct follow-up and when, where and how they prefer to be contacted. Before we communicate any employee information to a third party, we obtain a signed release of information from the employee.

We emphasize confidentiality in all promotional materials and routine communications.

Our confidentiality criteria require ComPsych to:

- > Endorse and adhere to confidentiality guidelines from the Employee Assistance Professionals Association, a professional organization for the EAP industry
- > Use only licensed behavioral health care professionals as GuidanceExperts
- > Require a signed release of information from an employee before talking to anyone about the information
- > Explain confidential aspects of the program during employee and manager orientations
- > Require that counseling sessions be held in private, professional offices located in appropriate sites with convenient and confidential access

### **ComPsych Delivers Return on Investment**

Employees face problems like stress, depression, substance use, marital or family crisis, anxiety, financial or legal questions and workplace conflicts. These personal problems can significantly increase operating costs by posing the following employee performance problems:

- > Inability to make critical decisions
- > Absenteeism and tardiness
- > Conflicts and workplace violence
- > Use of expensive medical benefits
- > Inattentiveness that affects quality
- > Lost productivity
- > On-the-job accidents and related workers' compensation claims
- > Production errors

Integrating EAP with work-life services yields a strong return on investment for organizations like North Boone CUSD #200. Adding work-life services increases utilization of EAP counseling by making employees more comfortable with accessing ComPsych's services.

North Boone CUSD #200 can obtain a considerable return from a highly utilized program. Many of our customers have reduced benefit costs and achieved other measurable results. In addition, they have realized intangible returns such as lower stress and higher productivity, higher employee satisfaction and recognition as a desirable employer.

When North Boone CUSD #200 employees turn to ComPsych's FamilySource, LegalConnect and/or FinancialConnect programs, they get the information to resolve pressing issues, freeing them to be more productive at work. For example,

our participants report that each use of FamilySource, our suite of work-life services, saves an average of 9.6 hours. Our services can cumulatively save thousands of dollars through employees' productivity increases.



## Industry Leading Performance Results

Our people, processes and technology deliver timely, high-quality care for your employees and their dependents. Of course our best testimonial comes from our industry-leading service and performance results:

- > Satisfaction Rate of our customers' employees: **99%**
- > Average Speed of Answer (Seconds) to reach a GuidanceConsultant: **7.2**
- > % of calls answered in 30 Seconds: **99%**
- > Call Abandonment Rate: **1.1%**
- > EAP Case Resolution Rate for 5-Session Model: **81%**
- > Customer Retention Rate: **99%**

## Quality Is Our Mission

Quality is hard-wired into every aspect of the ComPsych organization. We recruit skilled, experienced staff; then, we monitor key operational processes daily and weekly. ComPsych's experienced clinicians work together with our GuidanceExperts to ensure that each employee receives the appropriate resources and care to resolve issues. Backing this is our technology, which supports our availability 24 hours a day, seven days a week, and our adherence to security and confidentiality. Together, our people, processes and technology deliver high-quality care for your employees and their families.

### Experienced Professionals for GuidanceResources

The driving force behind the company's vision, products and commitment to creating build-to-suit solutions for our customers is our founder and CEO, Dr. Richard Chaifetz, a licensed neuropsychologist. Dr. Chaifetz embodies and promotes core company values of passion, dedication, integrity, quality and value.

The caliber and integrity of ComPsych employees and GuidanceExperts uphold our reputation for quality services and high customer satisfaction levels. We recruit people who are highly accomplished in their fields and zealous about delivering exceptional customer service.

ComPsych's stability begins with our executive management team, which has been together many years and shares consistent corporate philosophies and management practices:

- > [Dr. Ewa Antonowicz, clinical director](#), brings more than 30 years of experience to ComPsych, where she worked since 1993. Her clinical and extensive management experience includes 10 years as director of an in-house EAP.
- > [Kim Baker, vice president of account services](#), has more than 20 years of experience in the employee benefits field. She has been with ComPsych since 2012. Kim oversees all customer implementations and coordinates with all operational areas to ensure a smooth transition. She coaches account managers to ensure high quality customer service and satisfaction.
- > [Jim Brown, senior vice president of operations](#), uses his 25 years of experience in the health care industry to ensure high-quality customer interactions. Jim has been with ComPsych since 2004. He focuses on continual improvement in customer service and GuidanceExpert transactions.
- > [David Campbell, senior vice president of quality management](#), has more than 20 years' experience in the EAP and behavioral health business and has been with ComPsych since 1993. David works closely with ComPsych's senior management to monitor and ensure adherence to quality standards.
- > [Shari Gunaka, Work-Life Team Lead](#), brings over 13 years of experience in the mental health field to her role at ComPsych. Shari provides supervision in the

work-life department, where she mentors her team as they help callers access resources including childcare, retirement support and financial counseling.

- > [Dale Grenolds, senior vice president of sales and account services](#), has more than 20 years of health care industry experience. He leads ComPsych's sales and account services teams in selling and managing EAP, work-life, wellness, FMLA administration and managed behavioral health care programs.
- > [Adam Gotskind, corporate counsel](#), has 20 years of experience as an attorney and has been with ComPsych since 1994. He directs ComPsych's LegalConnect program, overseeing our in-house staff attorneys and program development.
- > [Bob Jacobson, chief financial officer](#), has more than 20 years of diverse experience in corporate and individual financial affairs, and has been with ComPsych since 1996. Bob oversees ComPsych's FinancialConnect program.
- > [Fonda Phillips, director of the GuidanceResources unit](#), has more than 25 years of nursing and behavioral health experience. She has been with ComPsych since 1994. Fonda manages ComPsych's GuidanceConsultants and ensures that our customers' employees and their family members are promptly referred to local GuidanceExperts and resources.
- > [Ronnie Schecter, director of network services](#), has more than 30 years of experience in network development and has been with ComPsych since 1996. Ronnie develops and maintains our networks, including recruitment, fee negotiation, credentialing, contracting, education and management. Ronnie serves on our Quality Management and Clinical Management Committees to ensure that network clinicians provide quality services.
- > [Jeff Tschiltch, chief information officer](#), has more than 30 years' experience in information technology and has served in leadership roles for the past 20 years. Jeff provides executive oversight and leadership for all of ComPsych's technology operations and initiatives.
- > [Ken Zuckerberg, vice president of training](#), has more than 15 years' experience as an organizational development consultant and employee training strategist, with a focus on helping companies manage the people side of strategic initiatives. Ken strategizes with customers to establish training curricula and delivers executive coaching, presentations and workshops.

Across our organization, the ComPsych team is composed of experienced professionals. The following table highlights what various teams do and details requirements of each position:

Team	Qualifications
Account managers	<p>Work closely with North Boone CUSD #200 to set and meet program goals</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a bachelor's degree in a related field such as business, psychology or communications</li> <li>&gt; At least five years' professional experience</li> <li>&gt; Experience in the benefits industry (such as EAP, behavioral health, work-life, wellness or disease management)</li> <li>&gt; Experience in customer service, business communications and/or corporate training</li> </ul>
GuidanceConsultants	<p>First point of contact for the toll-free line</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a master's degree in behavioral health or a related field</li> <li>&gt; At least three years' experience in assessing behavioral health issues and dealing with emergencies</li> <li>&gt; Experience in work-life issues</li> <li>&gt; Diagnostic and intervention skills</li> <li>&gt; Ability to use a problem-focused, action-oriented approach for caller issues</li> </ul>
Clinical care reviewers	<p>Review cases and interact with GuidanceExperts to provide guidance on treatment plans</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a master's degree</li> <li>&gt; At least five years' direct experience in behavioral health care</li> </ul>
Critical Incident Stress Management (CISM) coordinators	<p>Provide immediate phone consultation to distressed callers, coordinate critical incident response activities</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a master's degree</li> <li>&gt; At least two years' direct experience providing CISM services</li> <li>&gt; Expertise in crisis intervention and trauma assessment</li> </ul>

Team	Qualifications
Employee Relations specialists	<p>Provide consultation to managers in accordance with the employer's policies and procedures</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a bachelor's degree</li> <li>&gt; At least five years' experience in direct HR consulting</li> <li>&gt; Extensive knowledge of organizational and employment-related issues</li> </ul>
Formal referral specialists	<p>Assist managers in making formal referrals (including substance use) to the EAP</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a master's degree</li> <li>&gt; At least three years' direct experience in assessing substance use and dealing with chemical dependency treatment issues</li> <li>&gt; Extensive knowledge of EAP and its application in with the workplace</li> </ul>
Resource specialists (FamilySource)	<p>Research family care and personal convenience needs and issues</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a bachelor's degree</li> <li>&gt; Relevant work-life and research skills</li> <li>&gt; Experience in a setting such as a school or a day care or elder care setting</li> </ul>
Legal services attorneys (LegalConnect)	<p>Provide information regarding legal matters</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a juris doctor degree and passing of bar exam</li> <li>&gt; Experience in assisting with practical and emotional aspects of legal concerns</li> <li>&gt; Minimum of five years' direct experience</li> <li>&gt; No judgments for legal malpractice</li> </ul>
Financial services specialists (FinancialConnect)	<p>Provide information and resources regarding financial issues</p> <ul style="list-style-type: none"> <li>&gt; Minimum of a bachelor's degree</li> <li>&gt; Professional certification such as CPA or CFP</li> <li>&gt; Minimum of five years' experience in financial planning</li> </ul>

### Setting Our Standards

## Tesla Motors

After achieving an exceptional 49 percent total EAP utilization rate and a 72 percent case closure rate for its 6,000 U.S. employees, Tesla expanded its GuidanceResources program to include 17 additional countries for its operations throughout Europe and Asia. “It’s more than just an EAP,” said Nate Randall, senior manager, Global Benefits and Employee Experience at Tesla. “It’s a comprehensive solution for our employees. Our utilization is probably four times higher than what some of the highest rates are at other companies. I would definitely say this is our ‘highlight benefit’ because it’s tangible and relevant to employees’ lives. They can really see how it’s going to benefit them.”

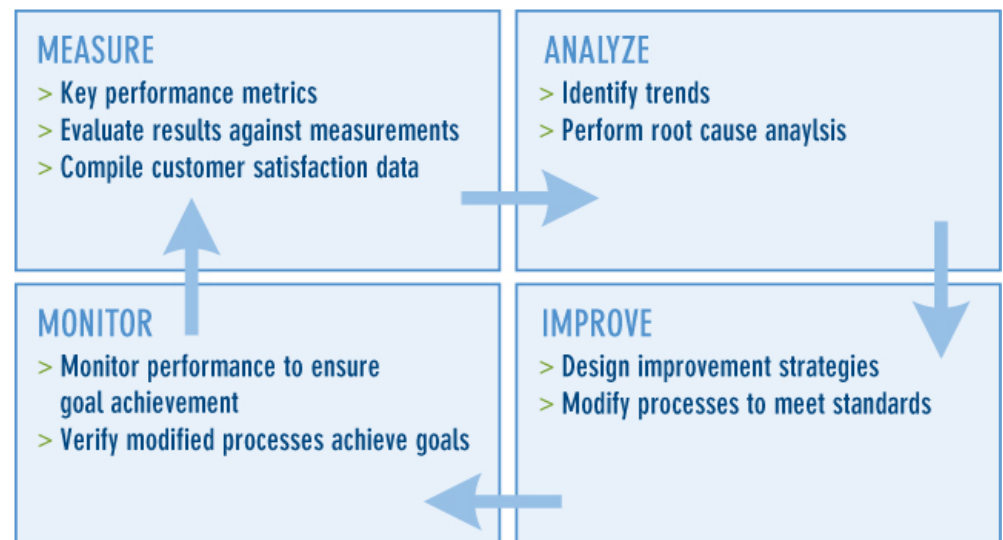
A primary goal is to meet or exceed our customers’ expectations and our own standards, and we work toward it through our operations and monitoring practices. We begin by discussing your expectations, monitoring our services during intake and overseeing quality throughout counseling and work-life services delivery.

ComPsych applies quality management practices to all areas of our business including:

- > **Account management:** timely and seamless program implementation, accurate reporting and support in developing compelling communication pieces
- > **Network management:** availability and quality of network GuidanceExperts, evaluation of their performance and management of any employee complaints and grievances
- > **Intake:** availability and responsiveness of GuidanceConsultants, completeness of response to service requests
- > **Quality oversight:** adherence to defined review guidelines and professional interactions
- > **Customer service:** responsiveness to and resolution of employee concerns
- > **Claims administration:** accuracy and processing turnaround time
- > **Employee satisfaction:** response to services

We consistently monitor our processes to ensure compliance with our high-quality standards and to achieve the best possible results for our customers. Our approach includes a four-step process to measure and analyze results, improve metrics and monitor ongoing performance, as the following graphic depicts:

### ComPsych’s Quality Process



### Focusing on Employee Satisfaction

Satisfaction with our service delivery will invigorate North Boone CUSD #200's program and boost utilization. We seek feedback in the following situations:

- > Two days after contacting ComPsych, we call or email the customer (depending on customer preference and permission) to ensure the GuidanceExpert was available, encourage follow-through with the referral recommendation, and determine if they would like any further assistance.
- > Five days after a customer contacts ComPsych, we email a satisfaction survey to evaluate their experience with our GuidanceResource Unit.
- > Ten days after a customer contacts ComPsych, we email a satisfaction survey to evaluate their experience on either our FamilySource, LegalConnect, or FinancialConnect services (depending on the services they received).
- > Thirty days after a customer contacts ComPsych, we send a survey to evaluate the customer's experience with their GuidanceExpert.

We also collect feedback on our GuidanceConsultants, FamilySource resource specialists, management consultations, CISM services, Internet services, training sessions, program implementation and overall account management. Our reports to North Boone CUSD #200 will include results of satisfaction surveys to identify strengths and areas for improvement.

In addition to account managers' ongoing contact with customers, ComPsych sends a semiannual survey to assess areas such as account manager availability, responsiveness, and follow-through; the handling of crises; the timeliness and value of reports; notification regarding new services; the value of consultations; the effectiveness of promotional literature, training and Internet services; and the satisfaction with program performance.

### **Quality Certifications, Accreditations, Memberships**

#### **URAC Accreditation**

ComPsych holds a three-year Core-accreditation by the Utilization Review Accreditation Commission, (URAC), a leading accreditor of organizations that provide health care management support services. As such, ComPsych maintains full compliance with URAC's Core Standards, which include stringent quality and accountability measures on organizational policies and procedures; regulatory compliance; marketing and sales; quality management; staff qualifications and management; information management; clinical staff credentialing and oversight; health care system coordination; and consumer protection.

#### **EAPA Membership**

ComPsych is an organizational member of the Employee Assistance Professionals Association (EAPA), a membership organization for employee assistance professionals around the world. EAPA hosts an annual conference, publishes the *Journal of Employee Assistance* and offers training and other resources.

***Certified HIPAA Compliance***

ComPsych fully complies with all requirements of the Health Insurance Portability and Accountability Act (HIPAA). In addition, ComPsych complies with HIPAA's nondiscrimination requirements relating to wellness programs. We also comply with HIPAA's standardization of health care transactions through electronic data interchange, which requires health plans to accept a series of specific transactions electronically. Independent verification has been conducted certifying all applicable transactions.

***EMPAQ Outstanding Data Supplier Seal***

ComPsych received the Employer Measures of Productivity, Absence and Quality™ (EMPAQ®) Outstanding Data Supplier Seal, recognizing key vendors for supplying high-quality data to support performance measurement. EMPAQ is a leading benchmark tool for assessing programs that directly impact the health and productivity of the workforce. Vendors recognized with the Outstanding Data Supplier Seal have passed EMPAQ's rigorous quality assurance process, which ensures the accuracy and integrity of the data submitted.



## Reliable & Secure Technology Infrastructure

North Boone CUSD #200 employees and management can rely on ComPsych's stable technology infrastructure and availability 24 hours a day, seven days a week. We maintain the industry standard of 99.995 percent uptime, supported by a redundant network and fully operational data centers in diverse locations to ensure service availability even during crises. The highly confidential information stored in our system requires sophisticated security. We secure employee and customer data using the following measures:

- > Multilayered password protection protocols
- > Firewall
- > Virus-scanning software, including two gateways for emails
- > Two levels of facility security

We back up data nightly to ensure continuity of services during an interruption. Our disaster recovery plan ensures our data network, telephone system and databases will always be available to North Boone CUSD #200's employees.

Our provisions for data security include:

- > Employing and maintaining firewall configurations with IPS installed and monitored
- > No usage of default and shared passwords or security parameters
- > Encrypting all data that is sent across open public networks (email, EDI or file transmission)
- > Employing and updating anti-virus software on a daily basis
- > Maintaining secure systems and applications pursuant to our Information Security Policy and Application Security Policy
- > Restricting all application and data access on a need-to-know and function of role and responsibility basis
- > Employing unique and strong user IDs and passwords for each person with computer access
- > Strictly enforcing physical access to data via approved limited key card access to our tightly controlled/guarded (CCTV, alarmed door, true floor to ceiling walled, windowless) data center
- > Approving employees for their access and authority level by department head sign-off. We then apply authentication within our application. All updates logged and monitored. Database access is locked down to within application transactions.
- > Requiring all employees to electronically sign off that they read and acknowledge our Data Confidentiality and Privacy Policy annually

## Pricing for North Boone CUSD #200

The following pricing is offered on a per-employee-per-month basis for North Boone CUSD #200's 170 employees.

	3-session	5-session
Fully integrated GuidanceResources (Face-to-face EAP counseling, FamilySource, LegalConnect, FinancialConnect and GuidanceResources Online)	\$1.28	\$1.41

There is an annual minimum program fee of \$1,000.00 per year.

With a five-year guaranteed contract, ComPsych will offer North Boone CUSD #200 a five-year guaranteed rate. ComPsych's proposal is valid for six months.

### GuidanceResources Program Services

#### EAP Services

- > Local in-person EAP assessment, referral counseling and brief treatment (up to 5 sessions, depending on the model chosen, per issue per employee/family member per year)
- > Community resource referrals to supplement EAP counseling
- > Network management
- > Individual follow-up and satisfaction surveys
- > Critical incident response services: expert management consultation and prompt on-site services to lessen the impact of traumatic events (telephonic consultation is unlimited; on-site CISM services are available on a fee-for-service basis at \$225.00 per hour)
- > Management consultation and referrals
- > Drug-free workplace and DOT policy consultation, substance use assessments and case oversight

#### Work-Life Services

- > Family care services (FamilySource): Customized research, tailored educational materials, and prescreened referrals for child care, adoption, elder care, education, pet care and personal convenience services
- > Legal services (LegalConnect): Unlimited phone information on legal issues by ComPsych staff attorneys; free 30-minute assessment and 25 percent discount off fees when in-person representation is necessary
- > Financial services (FinancialConnect): Unlimited phone information on financial issues by ComPsych staff CPAs and CFPs

#### Program Administration Services

- > Toll-free access 24 hours a day, seven days a week, to counseling and crisis intervention by master's-level clinicians

- > GuidanceResources Online: online interactive services
- > Unlimited program utilization
- > Program literature—promotional brochures, wallet cards and semiannual posters and fliers
- > Program evaluation, reporting and account management
- > On-site Training: these include employee orientation sessions, manager orientation sessions, or personal development workshops. Onsite training is available for \$150/hour.

For CISM and training purposes, ComPsych uses local GuidanceExperts and trainers/facilitators whenever possible, so travel is rarely required. When travel is required, it will be billed as mutually agreed upon.