



**Employee Assistance
Program Proposal**

Gray Industries



Catalyst Consulting
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Oakland, California 94610

Dr. Jodi Jacobson
Vice President, Human Resources
Gray Industries
525 West Redwood Street
Baltimore, Maryland 21201

December 17, 2012

Dear Dr. Jacobson,

We at Catalyst Consulting are pleased to present Gray Industries with our proposal for an efficient and effective employee assistance program. Our proposal reflects Gray Industries request for a comprehensive employee assistance program to service its diverse workforce and associated family members, effective start date March 1st. Catalyst Consulting would like to establish a long and mutually beneficial partnership with Gray Industries, in order to provide the most valuable and capable services in the industry.

As a growing national employee assistance service provider, we are currently providing high quality programming and clinical services to the employees and families of Raytheon, Boeing and Tesla, in addition to many others. We have experience working with individuals from all service industries, especially manufacturing where safety is a priority. A catalyst is sometimes described as a reason or motivator for change - we hope to be the catalyst for Gray Industries employees' and families, whatever their personal or professional need.

Please find attached our technical proposal and initial operating budget.

We appreciate and thank you for your consideration.

Catalyst Consulting:
EAP Proposal for Gray Industries

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Organizational Issues

Mission

Catalyst Consulting recognizes the need for relevant and efficient employee assistance programming in today's workplace. It is well documented that companies that utilize and promote EAPs are best able to meet the personal and professional needs of their most valuable and volatile asset, their employees. Personal problems, that could include drug and alcohol abuse, family or emotional concerns, among others, all impact the workplace. These issues can negatively impact of the company's bottom line without a program in place to address both the personal and professional needs of employees. By providing a combination of proactive and reactive services, our EAP will improve the overall quality of life for employees and qualifying family members, which will enhance workplace productivity for Gray Industries. At Catalyst Consulting our mission is to provide the most relevant, reliable and high quality employee assistance program possible to America's constantly evolving workforce and families. We offer safety conscious telephone intake, face-to-face assessment, as well as short-term counseling and comprehensive referral services for employees and family members experiencing a variety of occupational and personal problems. Additionally, we are able to provide management consultation, staff trainings and critical incident support to best meet the needs of Gray Industries.

Location

Catalyst Consulting is conveniently headquartered in beautiful Oakland, California. With easy access to three major airports (San Francisco, Oakland and San Jose) our staff is able to travel to Gray Industries various, nation-wide locations quickly and cost effectively. Catalyst Consulting is also fully compliant with the Knox-Keene Health Care Service Act



Plan of 1975 and maintains a Knox-Keene license. This license enables Catalyst Consulting to provide high quality clinical EAP services to Gray Industries California employees and families (State of California, 2012). Our call center is located within our Oakland, California headquarters, lowering overhead. This arrangement also affords our Care Coordinators a higher level of clinical supervision. For a complete organizational chart, please refer to Appendix A.

In order to provide the highest quality service, Catalyst Consulting focuses on superior service within the United States. If Gray Industries grows to expand internationally, we have a long time affiliation with PPC Worldwide, the leading global provider of employee assistance programs. When appropriate, we are happy to discuss international options and possibly negotiate a subcontract with PPC Worldwide for additional services.

Program Model

As an external EAP, Catalyst Consulting offers both on and off-site counselors and access to large network of highly qualified, professional affiliates. For worksites with more than 5,000 employees, we recommend a full-time, on site counselor. For those facilities hosting an onsite counselor, we require a private office in a discrete location. If a large worksite cannot provide a confidential or appropriate workspace for an on-site counselor, full time counselors will be positioned within the local community, at Gray Industries' expense. For worksites with 500 or less employees, Catalyst Consulting will refer employees to a qualified affiliate within our local network. For employees unable to access an on-site counselor, all family dependents, and those seeking services after hours, Catalyst



Consulting maintains a 1-800 number, staffed 24 hours a day, 7 days a week, for more information please see the "Direct EAP Services" component of this report.

Legal and Current Issues

Legislation

Drug-Free Workplace Act of 1988

Catalyst Consulting is able to help Gray Industries maintain compliance with the Drug-Free Workplace Act of 1988. The Act requires some federal contractors and all Federal grantees to agree to provide a drug-free workplace as a condition of receiving monies in excess of \$100,000 from any Federal Agency. The Act only applies to those employees working on a project that receives federal money. Although Gray Industries may or may not be required to provide a drug-free workplace to all its employees, your decision to enforce a drug and smoke free workplace is an excellent way to protect your business and promote recovery and rehabilitation (United States Department of Labor, 2012). In order to maintain compliance with the law, the following six conditions must be met:

1. The employer must have a written policy that explains what is prohibited and the consequences of violating the policy.
2. Employees must read and consent to the policy as a condition of employment on the project.
3. The employer must have an awareness program to educate employees about alcohol and other drugs of abuse and addiction, the employer's policy, and available help, including counseling and other assistance.
4. Employees must disclose any conviction for a drug-related offense in the workplace to the employer within 5 days after such conviction.
5. Employers must disclose any conviction for a drug-related offense in the workplace to the Federal agency with which the employer has a grant or contract, within 10 days after receiving notice from the employee or others.



6. Employers must make an ongoing effort to maintain a workplace free of drugs. (Substance Abuse and Mental Health Service Administration, 2007).

Catalyst Consulting is able to help Gray Industries maintain compliance with the Drug-Free Workplace Act by offering our services and expertise. We are available to help draft, review and revise your written policy to ensure it meets industry standards. As part of our program, we offer educational seminars for employees and supervisors about how to recognize the signs of drug and offer abuse and offer concrete steps for reaching out to a coworker in need. Catalyst Consulting is also available to help case manage your employees who violate the Act by ensuring they get high quality treatment services and comply with their treatment plan. Access to an employee assistance program proves to your employees Gray Industries cares about their recovery and demonstrates your commitment to their overall wellbeing and safety. For more information about the Drug-Free Workplace Act, and how an EAP can assist with compliance please see Appendices B, C and D.

Labor Laws

As a large employer of union members, Gray Industries may be particularly interested in the legislative policies governing labor unions. In addition to strengthening the employee/employer relationship, employee assistance programs improve labor relations by helping maintain compliance with various labor laws and offering union members an additional workplace resource (Rosenberg, 2009). In 1935, Congress passed the National Labor Relations Act ("NLRA") to promote healthy private sector employer-employee relations. Congress hoped the act would stabilize the United States economy by limiting strikes and work stoppages, and prevent violence, resulting from the labor disputes. The NLRA was successful in establishing basic rights for employees, including the establishment of the National Labor Relations Board, with the authority to protect and



enforce the rights granted by the act. Under the National Labor Relations Act, employees are legally protected if they choose to join a union and engage in collective bargaining. Also, employees are able to be legally represented by their union and are protected from targeted discrimination based on union activity and involvement (National Labor Relations Board, 2012). Catalyst Consulting is able to help educate employees on the legal protection offered through their unions by the establishment of the National Labor Relations Board.

In 1947, the controversial Taft-Hartley Labor Act amended the NLRA. The act granted the president the authority to request an injunction if it was believed a strike would endanger public health or safety. This created a "cooling off" period, designed to prevent national emergencies (Wagner, 2002). The act also outlawed a variety of union practices, including secondary boycotts that were used to force other employers to support a specific union by not doing business with the target employer. Also, "closed shops" that discriminated against and refused to hire non-union members were prohibited. These changes to the NLRA are currently impacting the passage of "right-to-work" laws in various states (Wagner, 2002). States supporting a Right to Work law allows employees to decide if they want to join or financially contribute to a union (National Right to Work Legal Defense Foundation Incorporated, 2012). As Right to Work initiatives become more popular, Catalyst Consulting can help provide education and consultation to Gray Industries regarding the changing legislation as it impacts your various worksites.

EAP Trends

Aging workforce

America is aging and so is its workforce. The Bureau of Labor Statistics estimates the proportion of workers 55 years and older is projected to increase from 18.1% of the



labor force in 2008 to 23.9% in 2018 (Lee et al., 2012). Gray Industries has already noticed their older employees continue to work full-time, and in many cases well past traditional retirement age. This has impacted the ability to hire new employees and driven up the average age of employment. Older employees come with a wealth of knowledge and unique skill set that make them extremely valuable to employers. However, rising health insurance premiums and potentially decreased productivity due to health related concerns could negatively affect the bottom line. Gray Industries can help support its aging workforce by offering comprehensive employee assistance programming, cognizant of the needs of your aging workforce.

Catalyst Consulting has years of experience helping to improve company policy and implement new strategies designed to make the workplace more inclusive and productive for the aging workforce. We help organizations view their aging employees as an asset, not a liability. It has been found that a physically conditioned, disease-free older individual can not only be a productive worker, but can generally outperform their poorly conditioned younger colleague (Boyce, 2008). Our EAP helps to navigate the generational divide that often arises in multi-generational worksites through mediation and education. We look forward to helping Gray Industries develop programming that meet the needs of the aging workforce.

Workplace violence and other critical incidents

Workplace violence occurs across every sector, setting and occupation in today's economy and more often than not, a violent act is the last step in an increasingly hostile situation. In 2009, approximately 572,000 nonfatal violent crimes, including rape, sexual assault, robbery, and assault were perpetrated against persons age 16 or older while they



were at work. This accounts for approximately 24% of nonfatal violence against employed individuals, 16 or older, while this statistic may be shocking, workplace violence is on the decline (Harrell, 2011). Catalyst Consulting recommends having an established workplace violence policy. Studies have shown organizations with formal policies are more likely to be vigilant of potential violence. These organizations are also perceived as being more interested in their employees' wellbeing and committed to their protection (Bruce & Nowlin, 2011). We would be happy to help review your current workplace violence policy and promote a more proactive approach to identifying potential threats.

Many factors contribute to the probability a worksite may be more likely to experience an act of violence, such as substance abuse, reduction in force or perceived mistreatment (Chenier, 1998). As an employer, Gray Industries is responsible for the safety and security of their employees, as well as being aware of any potential for workplace violence. Catalyst Consulting is able to help diffuse situations before they become a threat to employee safety. We'd be happy to be included on any existing "Risk Assessment Team," or help create an interdisciplinary team in partnership with Human Resources and your safety department. These teams collaborate to establish protocol to that helps to identify, prevent and respond to workplace violence. It has been shown that organizations with Risk Assessment Teams are better able to identify and respond to potential threats of violence (Heitt & Tamburo, 2009). Please remember workplace violence can happen anywhere. Catalyst Consulting does provide comprehensive Critical Incident Stress Management services should the need arise.



Policy Statement

For a concise draft Policy Statement, detailing the proposed services to be provided by Catalyst Consulting to Gray Industries, please see Appendix E.

Direct EAP Services*Intake*

An individual may need assistance outside of regular business hours, which is why Catalyst Consulting maintains a 1-800 number, 24 hours a day, 7 days a week. During regular business hours (9 to 5, for both Eastern Standard and Pacific Standard time zones), Care Coordinators (sometimes referred to as "Intake Counselors") are available to make assessments and referrals to staff counselors, affiliate providers and applicable community resources. At the end of the business day, the phone line is transferred to our business partner, Work Life Solutions. Utilizing the same paperwork and protocol, Work Life Solutions is able to provide seamless overnight, holiday and over-flow coverage. Please see Appendix E for a comprehensive overview of the services provided by our partner, Work Life Solutions.

When an employee or family member calls the 1-800 number, they would be connected with a Care Coordinator. The Care Coordinator is responsible for gathering demographic data and assessing for common employee assistance problems, such as substance abuse or depression, which includes self-harm. The Care Coordinator would read the Statement of Understanding form (Appendix G), which includes our confidentiality policy. This practice ensures privacy for the client, with the exception of duty to warn disclosures, while explaining the scope of services offered by Catalyst Consulting. Following agency protocol, the intake form (Appendix H) would be completed, with the Care



Coordinator simply asking the questions. The Care Coordinator could then utilize the PHQ-9 (Appendix I) or ask the first two questions from the assessment, depending on the responses of the client. This method has been proven to effectively identify potential depression during a phone screen (Pinto-Meza, Serrano-Blanco, Penarrubia, Blanco & Haro, 2005). Due to its brevity and sensitivity, Catalyst Consulting requires the CAGE-AID assessment (Appendix J) be administered during all phone screens. The CAGE-AID is particularly useful because it is quick, simple and accurate while identifying both drug and alcohol abuse. While in development, the assessment was tested and proven to be an effective diagnostic tool across a wide range of races, education levels and both sexes (Brown & Rounds, 1995). By utilizing brief screening instruments and collecting only the most pertinent data, the Care Coordinator is able to quickly assess a caller's needs and refer them to an appropriate resource, such as a staff counselor or local affiliate.

Our Care Coordinators are trained to respond quickly and appropriately to all emergency situations. At Catalyst Consulting, an emergency is defined as the threat of homicide, suicide, or imminent harm to oneself or others, including substance abuse and workplace violence. These cases are also referred to as "high-risk" and may require additional consultation with the clinical supervisor or a psychiatric sub-contractor. If a Care Coordinator assesses a client and determines they need to be evaluated in a hospital setting, the Care Coordinator will remain on the phone until emergency services can take the individual in to custody, which helps to ensure the safety of the individual. If a case is determined to be urgent, an appointment with a staff or affiliated counselor will be established within 24 hours of the initial phone call. We pride ourselves on being able to



handle both emergency and high-risk cases with accurate professionalism, minimizing risk for both the employee and the company.

Face-to-Face Assessment and Short-Term Counseling

Employees and eligible family members are able to access both on and offsite counselors, depending on their location and availability of EAP staff. As noted above, if a worksite has 500 or fewer employees or is unable to provide an appropriate workspace for an onsite counselor, employees and family members will be referred to an offsite counselor (if available) or an affiliate counselor. Telephonic counseling is becoming an increasingly popular alternative to face-to-face counseling, and studies have shown it to be comparable to face-to-face counseling for some qualified participants (Stephenson, et al., 2003). However, at this time Catalyst Consulting does not provide any telephonic counseling, as many of our current clients prefer face-to-face counseling.

Standardized assessments offer important insight that helps guide the referral process. A recent study indicates, a majority of employees who seek EAP services are negatively impacted by some form of psychological distress (Prottas, Diamante, & Sandys, 2011). Therefore, all staff and affiliate counselors employed by Catalyst Consulting are required to administer both the PHQ-9 (Appendix I) and CAGE-AID (Appendix J) standardized assessments at the initial meeting with every client, intermittently throughout treatment and again during the final session. The Patient Health Questionnaire – 9 is a condensed version of the original Patient Health Questionnaire, a reliable, thoroughly tested depression screen (Spitzer, Kroenke & Williams, 1999). The PHQ-9 is well known and respected in the mental health field, utilizing DSM-IV TR diagnostic criteria for major depression. The instrument has proven to be an accurate measure as other



assessments for identifying depression (Kroneke, Spitzer & Williams, 2001). Counselors are also instructed to administer the CAGE-AID questionnaire. This assessment is particularly useful because it is quick, simple and accurate while identifying both drug and alcohol abuse. Many clinicians are familiar with both the PHQ-9 and CAGE-AID assessments, which could be beneficial if a referral to out an outside clinician or treatment facility proves necessary.

Treatment Philosophy

Catalyst Consulting utilizes evidence-based brief treatment models to best serve our clients in the allotted 8 sessions. All of our on-site staff and affiliate counselors employ motivational interviewing strategies (Burke, Arkowitz & Menchola, 2003) in conjunction with solution focused methods (Harlow, 2006) to get the best possible results for your staff and their families. However, not all occupational or personal problems are suitable for brief treatment within the employee assistance program. Situations that require more comprehensive services or do not fall within Catalyst Consulting's scope of practice are immediately referred to a more appropriate provider.

At Catalyst Consulting, we believe employee assistance programs can help improve productivity by providing resources and referrals, with brief treatment before occupational and personal problems become overwhelming. Employee assistance programs are not designed to treat severe mental health issues, or provide long-term psychotherapy. While there appears to be some cross over between EAP services and conventional mental health outpatient services (Sharar, 2008) Catalyst Consulting focuses on treating issues that specifically impact an individual's ability to work. Employee assistance programs work best



when preventing serious problems that could result in lost work time and decreased productivity.

Referral Process

As previously mentioned, not all cases are appropriate for the employee assistance program. With such cases, referrals are made to outside providers who provide specialized treatment. Our clinical supervisor recommends that Care Coordinators and staff counselors refer clients as soon as they become aware the EAP is unable to meet their needs. All of Catalyst Consulting's Care Coordinators, staff and affiliate counselors are, at minimum, masters' level clinicians' with specialized training in EAP concerns. Through standardized assessments and/or clinical judgment they are able to ascertain which environment would best meet their clients' needs. Employees who present with needs too complex for the EAP, such as severe mental illness, health related issues or substance abuse are referred to the appropriate venue, please see Appendix K for a more complete list of cases that will be referred to outside providers.

Most often, clients will be referred to a medical professional, treatment program or psychiatric specialist, depending on their assessed needs. Catalyst Consulting only refers to reputable organizations and professionals. To ensure the highest quality, we employ an outside agency to audit all potential referral providers and conduct random quality assurance assessments. Before any client information is shared with an outside provider, including progress notes (Appendix L), the client must sign a Release of Information form (Appendix M). Maintaining accurate and up to date records is an important part of a reputable, high quality EAP (Richard, Emener & Hutchison, 2009). Additionally, all paperwork and assessments are standardized across the organization, helping to improve



accuracy and ensure consistency between providers. Our referral partners understand Catalyst Consulting reserves the right to audit any and all paperwork pertaining to our EAP clients to ensure the highest quality of care.

Community Resources

Catalyst Consulting encourages staff and affiliate counselors to help employees and family members to connect with community resources. Often, an employee or family member may call or come in to the EAP office specifically seeking information about what is available in the community. Being able to provide suggestions for low or no cost treatment alternatives is an important aspect of an inclusive EAP (Csiernik, 2003). Therefore, it is expected that all of our counselors are familiar with their surrounding communities and know what is available to help supplement both face-to-face EAP sessions and formal referrals. For example, if a counselor is working with someone struggling with alcohol abuse it would be beneficial if the counselor was able to suggest various community groups who specialize in this issue, such as Alcoholic Anonymous or SMART Recovery. For a small sample of resources within a community, please see Appendix N.

Follow-Up Procedures

Employee assistance programs following the Employee Assistance Professional Association's Code of Ethics are required to follow-up with all clients, until "the client's welfare, needs, and risk factors are properly addressed" (2009). Catalyst Consulting is committed to providing our client's with the highest quality of care and recording our outcomes to help guide our practice. During the final session, the counselor or affiliate provider is required to complete a case closure form (Appendix O). This form includes the clinical summary, treatment plan compliance and referral information. Additionally, clients



are asked to complete a satisfaction survey (Appendix P), which can be filled out in person or over the phone with our Care Coordinators. These practices help ensure client satisfaction and make sure we're providing the highest quality clinical care.

No Show/Late Cancellation Policy

If an employee or family member does not show up for their first scheduled appointment with an affiliate counselor, there is no financial penalty, but it will count as one of their 8 available sessions. If the employee or family member misses another scheduled appointment with an affiliate counselor, within a 6-month period, they will be responsible for paying the counselor's regular fee, approximately \$65, before being able to reschedule another appointment. For employees who miss their on-site counseling appointment, they will not be assessed a financial penalty but should be aware that every missed session will count toward their 8 session total benefit. Catalyst Consulting requests 24 hours notice if a client is unable to attend a regularly scheduled appointment. Without 24 hours notice, a missed appointment is treated as a "no show." However, we are understanding of emergencies and if an employee or family member misses an appointment or has to cancel within the 24 hour window due to an unforeseen event, Catalyst Consulting may be able to waive the no show or late cancellation penalty on a case by case basis, please inquire with staff counselor or the program manager.

EAP Records

Catalyst Consulting owns all the EAP records and all the information contained within. As described in the 2010 Edition of the "EAPA Standards and Professional Guidelines for Employee Assistance Programs" all Catalyst Consulting record keeping procedures comply with the following essential components:



- 1) The EAP must maintain retrievable documentation of all direct services and recommendations.
- 2) EAP records must be maintained in accordance with all applicable laws and regulations.
- 3) EAP records must be maintained for the minimum period of time required by law or organization policy.
- 4) The storage, transfer and destruction of records must be handled in a manner to assure confidentiality.
- 5) Every effort must be made by the EAP to prevent the involvement of EAP records in arbitration, litigation, or any other dispute
- 6) EAP client records must be kept in a secure location and be available only to authorized EAP personnel. Client records and rooms where client records are stored must be locked, and computerized records must be maintained in a secure environment and separated from other data systems and all other records.

As noted above, all records are kept in a secure location, typically in a locked file cabinet in a lockable, private office. Some sites, with secured and encrypted technological capabilities are able to maintain electronic records. All records are private, and only available to the clinical EAP staff. If requested an individual may request a copy for their records. Files are destroyed in accordance with the laws of the state where each file is held.

Additional Services Questions

Support for Managers and Supervisors

As an organization unfamiliar with employee assistance programming, Gray Industries will be pleased to find Catalyst Consulting offers a variety of services to best help support managers and supervisors. We are experienced in offering management consultations, meetings that help coach and prepare managers and supervisors to have difficult conversations with their staff. These conversations often culminate with an



informal or formal referral to the EAP. Catalyst Consulting recommends a five-step process when making supervisory referrals:

- 1) observe work performance,
- 2) document your observations,
- 3) prepare for an interview with the employee,
- 4) discuss your observations, define the need for improvement and refer the employee to the EAP and
- 5) continue to monitor the employee's work performance.

Please remember the EAP is a voluntary service, and in order for our counselors and affiliates to share any information with the employer, the client must sign a specific Release of Information (Appendix Q). For a full explanation our Supervisory referral process, including recommendations, please see Appendix R, the Supervisor's Guide.

We are also pleased to offer Critical Incident Support Management (CISM) services following any traumatic event. Critical incidents are defined as, "sudden, unexpected, often life-threatening time-limited events that can inhibit an individual's capacity to respond adaptively. In addition to their human toll, organizational crises are disruptive to corporate business and workplace operations. Productivity, quality, profitability, and other key performance measures are adversely affected by such events" (Attridge & VandePol (2010). Offering CISM services to employees immediately following a traumatic event has been proven to significantly lessen the likelihood affected employees will develop a serious psychological reaction (Everly, Sherman, Stapelton, Barnett, Hiremath, & Links, 2006). To request CISM services for a worksite please contact your on-site provider, or the Account Manager if there is no on-site counselor available. There is no limit for crisis related services. For more information and greater explanation of our CISM services please see Appendix S.



Web-Services

Catalyst Consulting will set up, design and manage a website specifically for Gray Industries. It will feature the following services:

- Information, educational materials and self-help strategies to help employees and family members work well and live healthy
- Specific information about Catalyst Consulting EAP services, including contact information and basic demographic information about our staff and affiliate counselors
- Help in preparing for your session with a counselor
- Self-assessments on key behavioral health topics, including depression and alcohol abuse
- Access to a wide variety of information and resources

(Federal Behavioral Health, 2012) The website is not designed to replace a visit to the EAP, but rather give employees and families an overview of the program and some preliminary resources that may be helpful in variety of situations. The website can be further customized depending on the needs of Gray Industries and utilization of the various services.

Work/Life Services

In an effort to provide the most high quality employee assistance services in the industry, Catalyst Consulting does not directly provide any work/life services. We feel that offering exceptional clinical, educational and consultation services provides better care for your employees and family members. However, we recognize the need and benefit of work life programming and understand the wide variety of options available to organizations looking for the most comprehensive EAP services (McCann, Azzone, Merrick, Hiatt, Hodgkin, & Horgan, 2010). Catalyst Consulting has recently partnered with WorkPlace



Options, one of the largest and most respected work/life providers in the nation. Please see Appendix T for a complete overview of the services offered by WorkPlace Options which includes legal, financial, child and elder care resources and referrals, as well as wellness and health promotion. All these services are "value added services" and can be purchased "a la carte" or in a discounted bundled package. Catalyst Consulting is happy to work with you to determine the best selections for your organization. Based on Gray Industries employment demographic and identified needs, we recommend the comprehensive bundled package. Pricing information can be found in the attached budget.

Drug & Alcohol Compliance

As a part of our standard EAP services, Catalyst Consulting provides Drug-Free Workplace (DFWP) consultation and support to management. These services help link employees with struggling with substance abuse issues with qualified professionals. Catalyst Consulting does not directly provide drug-testing services, but we do contract with reputable drug testing companies nationwide. For further explanation how Catalyst Consulting can help maintain compliance with DFWP, please see Appendices B, C and D.

For those Gray Industries employees' who fall under the Department of Transportation's regulations regarding substance use, Catalyst Consulting is happy to provide case management and referral to an appropriately qualified substance abuse professional (known as a SAP). While all of our counselors have a clinical background in substance abuse we feel that it is in order to best maintain the integrity of the employee assistance program, we mandate that all DOT cases must be referred to an affiliate SAP provider. This process ensures the highest quality of care for your employees and the most objective and confidential treatment, away from the worksite. Once employees have met



with their SAP counselor and received a written evaluation and recommendations, Catalyst Consulting will be able to provide comprehensive case management services, to ensure continuity of care. To clarify, we only provide referral to a qualified SAP for DOT evaluations. Costs associated with evaluation by a SAP are the responsibility of Gray Industries. For more information about Substance Abuse Professionals and the Return to Duty process, please see Appendix U.

Additional Services

Based on the identified needs and demographics of Gray Industries, Catalyst Consulting is pleased to offer specialized services, geared toward improving the workplace culture and productivity of your organization. With the recent promotion of many front line employees to the managerial level, we believe your workforce could benefit from management coaching. These services are provided at no additional cost and can help improve the leadership skills and empower your growing managerial staff. For a complete explanation of the benefits of management coaching, please see Appendix V and the corresponding management coaching satisfaction survey, Appendix W.

Additionally, the nature of your work and the variety of jobs available makes Gray Industries an excellent candidate for Operation IMPACT. The program helps military veterans get acclimated and settled into the civilian workforce. Catalyst Consulting has partnered with Human Resources at many of our various client companies to implement this mutually beneficial hiring initiative. We take great pride in assisting former service members find meaningful employment and believe Gray Industries would be proud to help support this innovative program. Additional information about Project IMPACT can be found in Appendix X.



Program Implementation and Promotion

Catalyst Consulting is prepared to begin implementing and promoting our services as soon as possible. With Gray Industries help, we'd like to introduce our EAP Account Manager to key company contacts by January 18th in order to establish a mutually beneficial working relationship. The EAP Account Manager will also make sure the EAP new customer welcome package with draft contract will be available to all key administrators by January 25th. Together with Gray Industries Human Resource department, Catalyst Consulting's Account Manager would like to develop a communication plan and order communication materials by February 1st. This team can also work on scheduling orientations, information sessions and supervisory trainings, to be completed by February 1st. During this time period, the Account Manager will also finalize the contract service expectations while our clinical supervisor will identify key affiliates and introduce key clients and Catalyst Consulting staff.

During the first week of February, we will also begin promotion by sending introductory letters to employees homes and displaying posters, distributing pamphlets and advertising on internal communications. This process should be complete and operational by February 15th. Between February 15th and March 1st, we'd like to Begin orientation services, to include information sessions and supervisory trainings at all Gray Industries locations. Different members of the Catalyst Consulting operations team, which includes the EAP Account Manager, the clinical supervisor and senior staff counselors, will conduct these trainings. On February 22nd, we'd like to host an open house at Gray Industries corporate headquarters in Los Angeles, so Account Manager, Clinical Supervisor and CEO can introduce themselves and the Catalyst Consulting services to key corporate



staff. Comprehensive services will be operational as of March 1st. For a detailed visual timeline for the development and implementation process, please see Appendix Y.

Ongoing Program Promotion

Ongoing promotion is an important part of creating a robust and visible employee assistance program. Catalyst Consulting intends to offer a variety of promotional services and materials to support Gray Industries throughout the year. In addition to our educational seminars and supervisory trainings, we'd like to be included in all new employee orientations. Offering a brief orientation in this venue would allow Catalyst Consulting to give an overview of our program, introduce the onsite representative and highlight the various services and benefits we offer to all Gray Industries' employees and family members. A sample copy of the orientation presentation has been included as Appendix Z. For smaller worksites without an onsite counselor we are happy to produce a customized informational video highlighting the same information, complete with client testimonials. These services are offered at no charge and are included in the price of the service contract.

We also produce high quality, cost effective branded materials designed to promote our services. These products include; wallet cards (Appendix AA), brochures (Appendix BB) and posters (Appendices CC and DD). Additionally, worksites may request customized bi-monthly newsletters, highlighting educational seminars and pertinent workplace wellness topics. For an example from another contracted workplace, please see Appendix EE. Catalyst Consulting is committed to promoting our services, and would be happy to work with Gray Industries to offer other or additional services and materials to best meet the promotional needs of the organization.



Educational Seminars

Catalyst Consulting is proud to offer a variety of educational seminars, at no additional cost to every Gray Industries worksite. Topics include personal improvement, family life and wellness seminars. For a complete list, with detailed explanation of content and booking procedures please see our Training Guide Appendix FF. In order to constantly improve our service delivery, we encourage educational seminar and training session participants to complete a feedback form (Appendix HH) at the end of each session. We believe in continually developing new educational programming to best meet the needs of your workplace and its unique culture. If you cannot identify an appropriate seminar, please contact your onsite representative or the EAP account manager. We will work to create a specific training for your identified needs. If your managers need help identifying the specific needs of the worksite, we recommend meeting with the staff counselor or the clinical supervisor to help assess the environment and work culture. Catalyst Consulting also recommends establishing an "EAP Advisory Board" to help educate the EAP about worksite issues (Csiernik, 2003).

Demographic Diversity

The high quality services Catalyst Consulting strives to provide are inherently inclusive, culturally sensitive and relevant to all workplace demographics. The diversity of Gray Industries' employees does not necessitate a radical change from our standard provided services. We take pride in our large network of diverse practitioners, which includes both men and women, a range of ages and many racial backgrounds. Our affiliate counselors are available to all Gray Industries employees and family members, even if an onsite counselor is available. All promotional materials, client consent forms and



informational pamphlets are routinely printed in Spanish, and can be special ordered at no cost in a variety of other languages. Our educational seminars include a wide range of topics relevant to all staff. Included are many special topics pertinent to specific gender, race and other specific demographical needs. If additional work/life services are requested, WorkLife Options offers both eldercare and childcare discounts and local area referrals. To improve general workplace culture and employee camaraderie, Catalyst Consulting recommends establishing Employee Resource Groups ("ERGs") to reflect the diversity of cultures, special interests and abilities at Gray Industries (Bye, 2003). We have helped numerous other organizations implement and support these groups, at no cost. Employees are able to meet new coworkers, share ideas and work together to accomplish community service goals. Appendix HH is a suggested list of popular ERGs Gray Industries may be interested in introducing at various worksites.

Staffing

Account Manager

The Account Manager is Gray Industries' direct contact to Catalyst Consulting. They are responsible for monitoring the status of your account and introducing the services to your organization. They have regular contact with the clinical supervisor, as they help to assess the needs of the organization. Additionally, they conduct trainings for employees and supervisors, and offer management and policy consultation. The Account Manager is available to ensure seamless implementation, promotion and delivery of Catalyst Consulting services to Gray Industries. To be considered as an account manager, Catalyst Consulting requires a minimum master's degree in a related mental health field or business



administration. We also require at least 10 years experience administering social service programs, with preference to employee assistance.

Clinical Supervisor

For an organization the size of Gray Industries, Catalyst Consulting will require one Clinical Supervisor. This individual will be responsible for overseeing the on-site counselors and Care Coordinators, as well as screening and supervising the affiliate providers within on our network. The Clinical Supervisor is also required to ensure continuing education compliance and opportunities for our staff counselors and Care Coordinators. This individual must have a minimum master's degree in a mental health field, the highest level of independent licensure, CEAP certification, and the most advanced certification in CISM techniques. We require at least 15 years clinical experience, with familiarity supervising employee assistance professionals.

On-Site Counselors

Our on-site counselors are the "face" of Catalyst Consulting. These individuals are responsible for promotion, training and direct services at the larger Gray Industries worksites. We hope to employ professionals with knowledge of area resources and a connection to the local community. We require they possess a Master's degree for an accredited institution in a mental health field, or more advanced degree, with a license to practice independently in the state they are employed. On-site counselors must also be CEAP certified, adhere to the EAPA Code of Ethics and have at least 5 years clinical experience and CISM training and current certification.



Care Coordinators

For an account the size of Gray Industries, Catalyst Consulting requires two full-time Care Coordinators. These individuals will provide telephonic clinical assessments, schedule appointments with on-site and affiliate counselors, as well as make referrals to appropriate community agencies. Care Coordinators should also be prepared to assess for various risk factors including depression, substance abuse, domestic violence, child/elder abuse, threats of violence suicide and homicide (adapted from Business Health Services).

All Care Coordinators must have a Masters degree in social work from an accredited university and be familiar with employee assistance programs, through a reputable field or work experience.

Administrative Assistant

Catalyst Consulting believes Gray Industries would benefit from the services of dedicated administrative assistant. Reporting directly to the Account Manager, the Administrative Assistant is responsible for scheduling training seminars at the various worksites, updating and mailing promotional materials, and assisting the Account Manager with scheduling, customer satisfaction, reporting and website development. We require a Bachelor's degree in Human Resources, or a related field with at least 2 years experience working as an Administrative Assistant. This position also requires excellent written and verbal communication, proficiency with Microsoft Office Suite and exceptional interpersonal skills.

Consultants

To advise Catalyst Consulting, we contract with an experienced lawyer and a board certified Psychiatrist. These individuals are contracted for 8 hours each, a month to provide



expert advice on complicated cases. These professionals help to ensure we are meeting legal and medical requirements for our most sensitive and high-risk cases.

Communications

Catalyst Consulting provides 24-hour phone services. We have staff Care Coordinators based in our Oakland, California headquarters answering the phones 9am to 5pm Monday through Friday, both Eastern and Pacific Standard Times. For after hours, weekends and emergency overflow calls we partner with Work Life Solutions. Work Life Solutions is contracted to adhere to our employment, documentation and assessment standards, resulting in a seamless extension of our high quality services. Employees and family members calling after hours or on weekends, continue to call 1-800-GRAY-EAP in order to receive services. In the event of a large-scale disaster, Work Life Solutions will provide additional back up in order to quickly disseminate information to those who call the 1-800 number, at no additional cost to Gray Industries.

Affiliates

In order to provide the highest quality services, Catalyst Consulting seeks out the best local clinicians for our affiliate network. We recruit through local Employee Assistance Professional Association chapters, professional recommendations and nation-wide job seeking databases. We require the following credentials and experience to be considered for an affiliate counselor position:

- Minimum of a Master's level degree for an accredited institution in a mental health field
- Current Independent State License
- CEAP Certified (or CEAP Certification Eligible)
- Skilled at assessment, particularly with substance abuse and other addictions



- Knowledgeable about local resources, community agencies and working with managed care/insurers for referral purposes
- Previous EAP experience
- Have knowledge of stress management and meditation training, preference goes to those with CISM training/certifications
- Have clean, safe professional office space
- Are well-versed in confidentiality requirements and are willing to sign our confidentiality agreement
- Have at least 4 years of post-graduate, private practice, clinical experience.
- Ability to see clients within 72 hours of the referral
- Malpractice insurance – minimum \$1 million/\$3 million

(Adapted from “Prospective Affiliates”, the Wellness Corporation)

Above are the minimum requirements for applying for an affiliate position; today the majority of our affiliate clinicians well exceed these requirements. All potential applicants are rigorously screened, interviewed and orientated to our services by Catalyst Consulting. Many specialize in substance abuse, family and couples counseling or stress management. We require our affiliate network reflect the demographics of the worksite to ensure a variety of demographically appropriate and professional counselors. Many counselors are also bilingual, and all receive cultural competency training during their Catalyst Consulting orientation.

Clinical Supervision

Clinical supervision is available to all staff counselors, on an as needed basis to discuss any difficult case. Our staff counselors are required to discuss all “high risk cases” (defined in a previous section) with the Clinical Supervisor. They are also required to conference with the Clinical Supervisor for every 10th case opened. The Clinical Supervisor will also hold monthly “case conferences” for our on-site counselors via our secure online



meeting. This will give all the on-site counselors an opportunity to discuss trends at their various worksites. The Clinical Supervisor will visit each worksite, unannounced, at least once a year to ensure Catalyst Consulting is offering the highest quality clinical care.

Affiliate counselors are required to "consult" with our Clinical Supervisor for every 5th case opened. The Clinical Supervisor functions as consultant to our affiliate counselors, offering best practice recommendations. The Clinical Supervisor does not provide traditional "supervision" to our affiliates (Craig, 1997).

Quality Assurance and Outcome Measures

Off-site Counseling

Catalyst Consulting requires off-site counseling offices adhere to the following guidelines:

- The physical environment should reflect Catalyst Consulting's commitment to provide comfort and dignity to all participants of diverse backgrounds and ages.
- The office must be safe, clean, free of hazards, smoke free, child-friendly and professional. The space should be able to protect client and counselor confidentiality and ensure the office, grounds and overall facilities are safe and secure for clients, staff and documentation.
- Offices must be located within a reasonable distance to the worksite, provide a waiting room and be reasonably soundproof to ensure confidentiality.
- For facilities, offices, and grounds that are regularly used, rented, or owned, the EAP Affiliate maintains a permanent file of reports, including incident reports, that demonstrate its compliance with all:
 - a. Certification of occupancy requirements;
 - b. Zoning and building codes;
 - c. Occupational safety and health administration codes;
 - d. Health, sanitation, and fire codes; and
 - e. All other applicable safety codes.
- Preferably, the office should be accessible by public transportation; only if



available and readily used by the employees and family members of the geographical area.

- All offices must comply with The Americans with Disabilities Act (ADA) and other federal, state or local laws or municipal codes applicable to EAP services. Services should be handicap-accessible for physically, visually, and hearing impaired participants.
- Offices located within a staff member's home are strictly prohibited

(Adapted from "AtLife Affiliate Manual").

Utilization

Utilization is calculated in two ways, over a 12-month period. Catalyst Consulting tracks and reports both the A.1 and A.3 utilization, as defined by the Employee Assistance Professional Association.

- **A.1 utilization = $\frac{\text{EAP Information-only contact}}{\text{Number of Eligible Employees}}$**

EAP Information-only contact: The participant or user requests information, but receives no assessment.

- **A.3 utilization = $\frac{\text{Active EAP Cases}}{\text{Number of Eligible Employees}}$**

Active Case - A case that had some activity during a given annual reporting period. In some cases, such as addiction treatment, a case may remain opened for long-term follow up. A case should be considered active unless it was closed during a previous reporting period.

(Employee Assistance Professionals Association, 2010)

Based on our current book of business, we anticipate Gray Industries A.3 utilization rate to be approximately 5%. We hope to be highly visible within Gray Industries, making it easy for employees and family members to access and understand the value our services, all contributing to a robust utilization rate (Frost, 1990).



Quality Assurance and Outcome Measures

Catalyst Consulting strive to provide the highest quality services to each client who contacts the EAP. In order to maintain our outstanding customer satisfaction rates, we employ a third party "mystery shopper" to randomly audit our telephone intake services, staff counselors and affiliates. This group provides quarterly feedback to Catalyst Consulting and allows us to adjust course as necessary. Additionally, we request that all our clients complete a satisfaction survey (Appendix P) at the close of each clinical case, either in person or on the phone. The same form is utilized for clients seeking referral information or utilizing the value-added work/life programming. Also, the attendees of our on-site educational seminars are encouraged to complete a training satisfaction survey (Appendix GG). These surveys help guide our practice and improve our service offerings (Haines, Petit, & Lefrançois, 1999). If at any time, a client feels their needs are not being met they are encouraged to contact the Account Manager directly.

Outcome Measures – Clinical

Catalyst Consulting believes that getting a baseline reading and final session reading, utilizing standardized assessments provides the most accurate and reliable basis for measuring treatment outcomes. The data helps to guide practice and conceptualize outcomes. We require the PHQ-9 and CAGE-AID be administered during intake, intermittently throughout treatment and again at case close. By comparing the results of these clinical measures we determine the efficacy of our treatment and adjust as necessary (Greenwood, Deweese & Inscoe, 2006).



Outcome Measures – Workplace

In order to communicate the benefit of employee assistance programs to employers, programs must provide measurable workplace outcomes. Catalyst Consulting utilizes the “Chestnut Global Partners Workplace Outcome Suite” (Appendix II) to assess workplace outcomes. This evidenced based measurement assesses absenteeism, presenteeism, work engagement, life satisfaction, and workplace distress (Lennox, Sharar, Schmitz & Goehner, 2010). Catalyst Consulting prefers to administer the survey to a random sampling of employees who seek EAP services. The survey is administered as both a pre and post measure of workplace outcomes and helps to determine what effect the EAP is having on the workplace. Utilizing standardized measures across the EAP industry will allow organizations to compare results, and improve the quality of services provided to all workplaces (National Business Group on Health, 2008).

Reports

Catalyst Consulting routinely produces monthly utilization reports and a comprehensive annual report for each client company. The monthly utilization report is designed to provide a quick snapshot highlighting current trends in your various worksite locations. The annual report includes assessment and referral statistics, employee affiliation (location and union), commonly assessed issues, training and outreach engagements. We also include critical incident descriptions. For an example of an Annual Report completed for another client company, please see Appendix JJ. Catalyst Consulting is able to customize reports to your specifications. Please contact the Account Manager with special requests.



Performance Guarantees

While there are few standardized performance guarantees across the EAP field (Courtois et Al, 2005), Catalyst Consulting guarantees all employees and family members will be seen within 72 hours of contacting the EAP. We also guarantee an average of 95% on the client satisfaction survey.



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