

54



City of West Allis Matter Summary

7525 W. Greenfield Ave.
West Allis, WI 53214

File Number	Title	Status
R-2004-0185	Resolution	In Committee
Resolution relative to approving the Agreement between the City of West Allis and the Aurora Employee Assistance Program for Employee Assistance Services.		
Introduced: 6/1/2004		Controlling Body: Administration & Finance Committee

COMMITTEE RECOMMENDATION

Adopted

ACTION DATE:	MOVER	SECONDER		AYE	NO	PRESENT	EXCUSED
JUN 01 2004			Barczak	✓			
			Czaplewski	✓			
			Dobrowski				
			Kopplin				
		✓	Lajsic	✓			
			Narlock				
			Reinke	✓			
			Sengstock				
		✓	Vitale				
		Weigel		✓			
		TOTAL		5	-		

SIGNATURE OF COMMITTEE MEMBER

[Handwritten Signature]

Chair

Vice-Chair

Member

COMMON COUNCIL ACTION

ADOPT

ACTION DATE:	MOVER	SECONDER		AYE	NO	PRESENT	EXCUSED
JUN 01 2004		✓	Barczak	✓			
	✓		Czaplewski	✓			
			Dobrowski	✓			
			Kopplin	✓			
			Lajsic	✓			
			Narlock	✓			
			Reinke	✓			
			Sengstock	✓			
			Vitale	✓			
		Weigel	✓				
		TOTAL		10	-		

c: Paul Zuhler Personnel

**STANDING COMMITTEES OF THE
CITY OF WEST ALLIS COMMON COUNCIL
2004**

ADMINISTRATION & FINANCE

Chair: Michael J. Czaplewski
Vice-Chair: Martin J. Weigel
Gary T. Barczak
Thomas G. Lajsic
Rosalie L. Reinke

PUBLIC WORKS

Chair: Richard F. Narlock
Vice-Chair: Linda A. Dobrowski
Kurt E. Kopplin
Vincent Vitale
James W. Sengstock

SAFETY & DEVELOPMENT

Chair: Thomas G. Lajsic
Vice-Chair: Vincent Vitale
Gary T. Barczak
Martin J. Weigel
Rosalie L. Reinke

LICENSE & HEALTH

Chair: Kurt E. Kopplin
Vice-Chair: James W. Sengstock
Linda A. Dobrowski
Richard F. Narlock
Michael J. Czaplewski

ADVISORY

Chair: Rosalie L. Reinke
Vice-Chair: Gary T. Barczak
Linda A. Dobrowski
Vincent Vitale
Martin J. Weigel



City of West Allis

7525 W. Greenfield Ave.
West Allis, WI 53214

Resolution

File Number: R-2004-0185

Final Action:

JUN 01 2004

Resolution relative to approving the Agreement between the City of West Allis and the Aurora Employee Assistance Program for Employee Assistance Services.

WHEREAS, the City of West Allis has had an Employee Assistance Program (EAP) for many years; and,

WHEREAS, the City's EAP helps employees to address their personal, social, financial, and health related problems; and,

WHEREAS, Frank Haack, the City's health insurance consultant, has analyzed the City's current EAP and determined that certain operational changes are likely to result in health insurance financial savings; and,

WHEREAS, Frank Haack has recommended the adoption of the Aurora Employee Assistance Program to replace the City's existing program; and,

WHEREAS, the City's Labor Management Health Insurance Committee has previously reviewed and recommended adoption of this new program; and,

WHEREAS, it is in the best interest of the City to approve this program for a one-year trial basis to determine if the new program successfully accomplishes the contemplated operational and financial goals and objectives.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of West Allis that the attached agreement and proposal between the City of West Allis and the Aurora Employee Assistance Program be and is hereby approved for the time period specified of September 1, 2004 through February 28, 2006.

BE IT FURTHER RESOLVED that a staff report shall be prepared for the Common Council presenting the results of this trial effort prior to the renewal of this program.

BE IT FURTHER RESOLVED by the Common Council of the City of West Allis that the proper City Officials are authorized and directed to execute said agreement on behalf of the City.

ADM\ORDRES\ADMR256

ADOPTED

June 1, 2004

Paul M. Ziehler

Paul M. Ziehler, City Admin. Officer, Clerk/Treas.

APPROVED

June 4, 2004

Jeannette Bell

Jeannette Bell, Mayor

IX. LETTER OF AGREEMENT

This agreement is made between The City of West Allis, and The Aurora Employee Assistance Program. Whereas The City of West Allis wishes to purchase and Aurora Health Care intends to provide a system of employee assistance services to The City of West Allis.

Now, therefore, the parties agree as follows:

- I. Services. The Aurora EAP will provide services to **The City of West Allis**, consistent with Option ___ of the proposal attached hereto and made a part hereof. The Aurora EAP further agrees to comply with all applicable Federal and State laws, rules and regulations, including but not limited to the Federal "Americans with Disabilities Act," and further agrees to require all EAP subcontractors to do the same.
- II. Term. This agreement shall commence on Sept 1, 2004, and terminate on Feb 28, 2006. Either party may terminate this Agreement upon 90 days advance written notice, sent via certified mail.
- III. Insurance. The Aurora EAP will maintain professional liability insurance during the term of this Agreement covering its agents and employees against claims arising out of its services to be performed under this Agreement. The insurance shall provide minimum limits of liability of \$1,000,000 for each occurrence and \$3,000,000 annual aggregate. Certificates of insurance can be provided by the EAP, at the request **The City of West Allis**.
- IV. Indemnification. The Aurora EAP agrees to indemnify and hold **The City of West Allis**, its agents and employees, harmless from and against all loss, costs, damages, expenses, claims or causes of action, whether groundless or not, arising out of any services performed in connection with this Agreement which is caused by any act or omission, negligent or otherwise, of The Aurora EAP. **The City of West Allis**, agrees to indemnify and hold the Aurora EAP, its agents and employees, harmless from and against all loss, costs, damages, expenses, claims or causes of action, whether groundless or not, arising out of any services performed in connection with this Agreement which is caused by any act or omission, negligent or otherwise, of **The City of West Allis**.
- V. Payment. The consideration to be paid by **The City of West Allis**, for the services provided, shall be \$ 73.50 per employee per year commencing on Sept 1, 2004, and billable quarterly until paid in full. Payment is due within 30 days of billing. The parties further agree that employee count may be verified quarterly for billing purposes. In the event the employee count significantly increases or decreases from the initial 560 employees, the quarterly payment hereunder may be adjusted accordingly.

In witness whereof, the parties have executed this agreement as of the day and year written below.

Aurora Employee Assistance Program

By _____
Cheryl Lipscomb
Director, Employee Assistance Program
Aurora Health Care

The City of West Allis

By Paul M. Ziebler
Authorized Representative

PAUL M. ZIEHLER
Please Print

City Admin Off / Clerk Twp
Title

6/4/04
Date

Date

A
B
C
D

ATTACHMENTS

Aurora Employee Assistance Program



Investing in your greatest resource

Better Access . . .

Better Service . . .

Better Results.



**PROPOSAL FOR
THE CITY OF WEST ALLIS
BY
THE AURORA EMPLOYEE ASSISTANCE PROGRAM
February 21, 2003**

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All information contained in this document is considered by The Aurora Employee Assistance Program to be proprietary and confidential. Any duplication, reproduction or distribution of these materials for any other reason than review by The City of West Allis is prohibited.

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I. INTRODUCTION

A. PROGRAM PHILOSOPHY

Of the many factors that contribute to the success of a business, perhaps the most important of all is people. The individuals who work for a company are a unique and valuable resource whose health, commitment and productivity make the difference between a business that prospers and one that merely survives.

In today's competitive environment, companies cannot afford to neglect this most vital asset. That is why more and more businesses are investing in employee assistance programs to achieve and maintain their companies' peak performance.

Since our beginning, The Aurora EAP has been committed to helping businesses design and deliver the right combination of services to help employees handle personal problems in ways that maintain their dignity and respect, and achieves effective results for them, their families, and for their employer.

B. QUALIFICATIONS OF THE AURORA EMPLOYEE ASSISTANCE PROGRAM

The Aurora EAP was founded in 1983 on the guiding principle of prevention and early intervention as the path to total health. Reaching people early with education, information and other services that maximize their own strengths and coping skills can reduce the incidence of more serious mental and physical problems requiring intensive, long-term treatment. Individualized, responsive attention to the needs and satisfaction of our customers has been the hallmark of the EAP since our founding. We make listening to our customers, assessing and anticipating their needs, and exceeding their expectations an integral part of our business philosophy. The trust and loyalty of those we serve have made us Wisconsin's premier provider of employee assistance services. Currently, The Aurora EAP holds contracts with over 160 companies and 100,000 employees.

As part of Aurora Health Care, the Employee Assistance Program is committed to enhancing the well-being and quality of life of the diverse populations we serve through an integrated network of providers addressing the full spectrum of family and workplace needs. Aurora Health Care is a community-owned, non-profit health care system dedicated to promoting health, preventing illness, and providing state-of-the-art diagnosis and treatment, whenever and wherever we can best meet individual and family needs.

II. PROGRAM IMPLEMENTATION

The Aurora Employee Assistance Program is pleased to have the opportunity to present this proposal to **The City of West Allis**. The following components are available to be included in a program designed specifically for **The City of West Allis**.

A. ROLE of the EAP ACCOUNT EXECUTIVE

1. One primary Account Executive will be responsible for servicing the contract with The City of West Allis. All Aurora EAP Account Executives are Master's prepared clinicians and are Certified Employee Assistance Professionals (CEAP) or are CEAP eligible. All staff within the four-member team average 7 years of clinical as well as EAP experience. Please see **attachment I** for Account Executive staff biographies.
2. Prior to the start of the contract, the Account Executive will meet with a representative of The City of West Allis regarding EAP program design, implementation and policy development. The Account Executive will maintain on-going dialogue with the representative to provide management consultation, training, and all other components of the EAP that are necessary to ensure its success.

B. SUPERVISORY TRAINING

1. EAP Supervisory training will be provided for managers, supervisors and Union Stewards, when applicable. The training is based on a philosophy that supervision is generally more effective when it focuses on job performance issues and supervisors refrain from becoming involved in the personal problems of employees. Please see **attachment A** for a description of available supervisory training topics.
2. The EAP provides on-going opportunities for administrators and supervisors to attend annual trainings offered at one of our corporate locations, as well as other designated sites. Registration is recommended to guarantee seating. See **attachment A**.
3. When diminished job performance results in a **formal supervisory referral** to the EAP, The EAP will conduct an in-person assessment and provide specific feedback to the supervisor who referred the employee. The employee is asked to sign an Information and Consent Form (please see **attachment B**) that allows for the following information to be released to **The City of West Allis**:
 - Whether or not the employee kept the EAP appointment.
 - Whether or not recommendations were made.
 - Whether or not the employee agrees to comply with the recommendations.
4. When requested, a **Return to Work (RTW)** conference will be facilitated by the EAP. The goals of the meeting are to promote increased understanding about job performance expectations and to provide information relevant to the success of both the returning employee and the employer.

C. EMPLOYEE ORIENTATIONS

1. Employee Orientations will be facilitated on-site for the employees of **The City of West Allis**. The Account Executive will work in conjunction with the **The City of West Allis** representative to determine the most appropriate methods and scheduling for the delivery of EAP orientations.
 - The purpose of the orientation is to provide information about what the program is, how it benefits employees and family members and how the EAP can be utilized to support the resolution of a broad range of work/life challenges.
 - Eligible clients for EAP services are all **The City of West Allis** employees, spouses and dependent family members living in the same household.
 - The EAP offers an appointment within 2 working days of the initial client call. Appointments are available Monday through Friday, 9:00am to 9:00pm and Saturday, 8:00am to 2pm. If there is an urgent need, the client will be seen within 24 hours. **For emergent situations, the client will be seen within 4 hours.**
 - When a caller needs interpreter services, we will utilize a multi-lingual language line. An interpreter is contacted immediately via conference call and will help assess the needs of the caller, as well as schedule an appointment.

D. EAP RESOURCES

1. A letter of introduction will be provided to **The City of West Allis** for distribution to all employees. The cost of distribution will be the responsibility of **The City of West Allis**. Please see **attachment C** for a sample letter of introduction.
2. EAP information brochures and wallet cards will be provided for all eligible employees. Please see **attachment D** for a sample brochure and wallet card.
3. We offer on-line access to the EAP Website, as another convenient, confidential option for utilizing the program. Employees can obtain information regarding use of the EAP, information on topics such as depression, anxiety, parenting, balancing work and family and money management and how to utilize the website to request an EAP appointment.
4. PowerPoint presentations are provided as additional resources for the employees of **The City of West Allis**. Program content includes information about the EAP and how the program serves employees, family members, and **The City of West Allis**.
5. An EAP Supervisory Training video will be provided by the EAP for **The City of West Allis**, to support the on-going training of managers and supervisors about the EAP. An Employee Orientation video is also provided for use at new employee orientation, or as needed.

III. ON-GOING PROGRAM PROMOTION

A. PERSONAL ENRICHMENT SEMINARS

1. A variety of training topics will be available for the on-site training of **The City of West Allis** employees. All trainers are experienced facilitators with demonstrated skills in program content and program delivery. Please see **attachment E** for a description of available topics.
2. Following all seminars, participants will be asked to complete an evaluation about each training, including the value and usefulness of the program information as well as the effectiveness of the facilitator's presentation style. Evaluation summaries are available for **The City of West Allis**.

B. PROMOTIONAL MATERIAL

1. EAP newsletters and posters will be provided three times per year for **The City of West Allis** and **The City of West Allis** employees. Newsletter and poster content reflect a variety of work/life topics and tips that can be useful to employees and their dependents. It is the responsibility of **The City of West Allis** to determine the most appropriate methods for distribution. Please see **attachment D** for a sample newsletter and poster.
2. Magnets promoting the EAP are available and can be purchased on a fee for service basis. (optional)

IV. CRISES INTERVENTION STRATEGIES

A. EAP CRISIS LINE

1. All **The City of West Allis** employees and their dependents have access to masters' prepared clinicians twenty-four hours a day, seven days a week, to help resolve personal or family crises. **The City of West Allis** employees can utilize the crisis line by calling 414-257-2124 or the toll-free number 1-800-236-3231, between the hours of 5:30pm and 8:00am, seven days a week.

B. CRISIS CONSULTATION

1. One primary Account Executive will be available on-site or by telephone for **The City of West Allis** within two hours, for the resolution of a variety of workplace crises. These services are provided at no additional charge to **The City of West Allis**.

C. CRITICAL INCIDENT STRESS DEBRIEFING (CISD -optional)

1. EAP Account Executives are available and trained to facilitate formal CISD training when a catastrophic event occurs in the workplace. Due to the clinical nature of this process, two facilitators are required when utilizing this model for **The City of West Allis**. This service does incur an additional fee.

V. WORK/LIFE PROGRAMS

A. CHILD CARE AND ELDER CARE SERVICES

1. The Aurora EAP provides a telephone resource and referral service to help employees handle the demands of child care or elder care responsibilities. Child Care and Elder Care specialists will work with the employee to assess the needs, explore available options and develop effective solutions.
2. Services include education regarding the needs of children and dependent adults as well as provider searches for qualified caregivers. The specialists will help employees evaluate the caregivers based on qualifications, location and costs. The employee is ultimately responsible for all caregiver selections.
3. Child Care and Elder Care services are available to all employees, regardless of the location of their family members. Searches for caregivers can be conducted for the Metro-Milwaukee area, the State of Wisconsin, as well as the United States, Canada and Mexico.

B. FINANCIAL MANAGEMENT CONSULTATION

1. A certified credit counselor from Consumer Credit Counseling Service (CCCS) will meet with the employees and family members from **The City of West Allis** to facilitate confidential, in-person financial assessments. The consultation includes recommendations regarding budget and money management and when applicable, debt management services.
2. CCCS is a thirty-year program of Family Service of Milwaukee that has been delivering programs to Aurora EAP client companies and their employees since 1983. Consumer Credit Counseling Service is licensed by the State of Wisconsin, is a member of the National Foundation for Credit Counseling and is accredited by the Council on Accreditation (COA). The program is available to all employees, regardless of location.

C. LEGAL CONSULTATION

1. The Aurora EAP will provide legal consultation to employees who encounter a variety of legal problems such as financial and consumer issues, property or real estate matters and divorce or custody cases. **We will not make referrals for employment issues.**
2. EAP intake specialists will arrange a prompt phone consultation with an experienced, licensed attorney qualified in the general practice of law including but not limited to: family law, housing and real estate, wills and estate planning, consumer issues and criminal justice. The telephone consultation is provided free of charge. If retained, the attorneys will offer a 25% reduction in fees.
3. Up to 30 minutes of free Legal consultation is available to all employees, regardless of location.

VI. EAP PROGRAM MODELS AND SERVICES

All models include a comprehensive list of services to meet the on-going needs of **The City of West Allis** and **The City of West Allis** employees. The EAP will assist **The City of West Allis** in the development, implementation and maintenance of a **DRUG-FREE WORKPLACE**. Samples of drug and alcohol policies are available, as well as information about drug testing facilities and procedures.

The Employee Assistance Program meets the requirements established by the **Department of Transportation (DOT)** to provide assessments for employees who fail alcohol and /or drug screens. Select staff will act as the Substance Abuse Professional (SAP) and conduct a through assessment that includes the following:

- Two in-person evaluations per case
- Use of a standardized testing tool
- DOT required forms and documentation
- Follow-up through completion of treatment

Please see **attachment F** for a sample SAP Reporting Form.

A. ASSESSMENT AND REFERRAL (Option 1)

1. One to three problem-solving sessions to help employees and their dependents deal with a wide range of work/life challenges that impact personal happiness and workplace productivity.

B. SHORT-TERM PROBLEM RESOLUTION (Option 2)

1. Assessment plus five sessions to help identified employee's work through a variety of problems without accessing their insurance. This model is particularly useful for self-insured employers who wish to keep health insurance utilization and increased costs to a minimum.

C. CARE COORDINATION (Option 3)

1. Use of the EAP as the access into billable mental health and substance abuse treatment. Care coordination to insure that the right care is delivered at the right time for the right costs. This model provides savings through the negotiation of preferred provider rates and the coordination of care for the 20% of those who often cost 80% of the insurance dollars.

D. TOTAL PACKAGE (Option 4)

1. A full continuum of care that integrates Assessment and Referral, Short-Term Problem Resolution and Care Coordination to maximize the use of prevention and early intervention services and reduce the costs associated with intensive levels of care.

VII. ON-GOING PROGRAM MANAGEMENT

A. QUALITY ASSURANCE

1. Council on Accreditation (COA)

The Aurora Employee Assistance Program maintains accreditation by the Council on Accreditation (COA) and complies with the highest indicators for all quality measures. These measures include ongoing training and clinical supervision of all staff as well as credentialing and qualifications of service providers. Ethical standards set by EAPA (Employee Assistance Professionals Association) and other professional organizations such as NASW (National Association of Social Workers) and AAMFT (American Association for Marriage and Family Therapy) are enforced.

2. EAP Providers

All clients will be seen by a professional EAP counselor who is highly skilled in the areas of general mental health, family systems, drug and alcohol issues, as well as in providing EAP assessments. The counselors must have at least a master's degree in a behavioral science and three years of clinical experience.

When requested, every effort is made to match a client to a counselor based on ethnicity, language, and sex, as well as clinical specialty. Counselors are trained in cultural diversity and maintain the highest level of professionalism and sensitivity in delivering services to a culturally diverse population. Please see **attachment I** for EAP Assessment staff biographies.

The Aurora EAP maintains several sites throughout Metro-Milwaukee, as well as a statewide and nation-wide network. Clients will generally be able to access an EAP assessment within 30 minutes or 20 miles of their home or workplace.

3. Client Satisfaction and Outcomes

To ensure that our EAP services meet customer requirements, a confidential client satisfaction survey is utilized to measure service and quality. Feedback from the survey, as well as client complaint and compliments, are used as part of our quality improvement plan. The results of our surveys are available to **The City of West Allis**. Please see **attachment G** for a sample of the Client Satisfaction Survey.

B. UTILIZATION REPORTS

1. The EAP will provide Utilization reports for **The City of West Allis**. These reports will include statistics regarding telephone activity, assessments, training and other on-site EAP related services. Statistics are reported in aggregate numbers to maintain confidentiality. Information that could be used to identify employees or family members will not be included in this aggregate data. (Please see **attachment H** for sample Utilization Report.)

C. MANAGEMENT CONSULTATION

1. EAP Account Executives are available by phone on an unlimited basis to provide management consultation and assistance to **The City of West Allis** regarding a wide variety of challenging workplace situations. Account Executives are available to meet with key city contacts, and to attend important organizational meetings at your request.
2. On-site consultation is available on a fee-for-service basis. If you schedule an Account Executive for extended time, or all day events, for example to meet with employees for one-on-one counseling during a time of downsizing, this would incur an hourly charge.

VIII. PROGRAM INVESTMENT

Summary of EAP Services

Aurora Health Care will provide a comprehensive EAP to **The City of West Allis** that **includes** the following services.

1. **Model of Choice (Options 1-4)**
 - Assessment & Referral and Problem Resolution Sessions
 - DOT Evaluations
 - Return to Work Conferences
2. One Primary Account Executive
3. Supervisory Training and Employee Orientations
4. Implementation Resources
 - Introductory letter
 - Brochures & wallet cards (employee count + 10% per year)
 - Language Line
 - EAP Website
 - PowerPoint presentations
 - EAP Supervisory Video (up to 3), Employee Orientation Video (up to 3)
5. On-going Program Promotion
 - Personal enrichment training (up to 4 hours included, then Fee For Service)
 - Newsletters (3 times per year- employee count +10%)
 - Posters (3 times per year – no. determined by company)
6. Crisis Intervention
 - 24/7 Crisis Line
 - Telephone and on-site crisis consultation
7. Work/Life Programs
 - Child care and elder care services
 - Financial management
 - Legal consultation
8. On-going Program Management
 - Quality assurance
 - EAP providers
 - Client satisfaction
 - Quarterly Utilization reports
 - Unlimited telephone consultation

Capitated Rate(s)	OPTION 1 – Assessment & Referral	<u>\$ 17.50</u>	per employee per year
	OPTION 2 – STPR 1 + 5	<u>\$ 23.50</u>	per employee per year ✓
	STPR 1 + 7	<u>\$ 23.75</u>	per employee per year
	OPTION 3 – Care Coordination	<u>\$ 27.75</u>	per employee per year
	OPTION 4 – Total Package	<u>\$ 30.15</u>	per employee per year

OPTIONAL SERVICES/RESOURCES

The City of West Allis can choose from the following options to tailor the program to meet the **additional** needs of The City of West Allis.

On-site Personal Enrichment training	\$125.00 per hour including materials
On-site management consultation	\$125.00 per hour including materials
Critical Incident Stress Debriefing (CISD)	\$125.00 per hour including materials

Work/Life Brochures	.28¢
EAP Magnets	.42¢

Additional information pieces

Employee Brochures	.16¢
Wallet Cards	.36¢
Newsletters	.12¢
Posters	.65¢

\$50.00 per hour for travel by car when beyond 1 hour

IX. LETTER OF AGREEMENT

This agreement is made between **The City of West Allis**, and The Aurora Employee Assistance Program. Whereas **The City of West Allis** wishes to purchase and Aurora Health Care intends to provide a system of employee assistance services to **The City of West Allis**.

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In witness whereof, the parties have executed this agreement as of the day and year written below.

Aurora Employee Assistance Program
By *C Cheryl Lipscomb*
Cheryl Lipscomb
Director, Employee Assistance Program
Aurora Health Care

The City of West Allis
By *Paul M. Ziebler*
Authorized Representative

PAUL M. ZIEHLER
Please Print

City Admin. Off / Clerk Treas.
Title

6/9/04
Date

6/4/04
Date

X. ATTACHMENTS

Helping Managers Manage

2003 Management Training Series

A Management Training Series from the Aurora Employee Assistance Program

Managing in today's world of work is a challenging proposition. The Aurora Employee Assistance Program has created a series of training seminars to help you meet both the expectations of your organization and your own personal and professional goals. The presentations may be attended as a series or individually.



From Stress to Strength

Wednesday, May 21

Work, Family, Finances, Lifestyle, Illness, Friends—stress can come from almost any aspect of your life. During this presentation we discuss the nature of stress and help you to identify your stress origins and symptoms. In addition, you will learn proactive ways to manage your stress with a variety of techniques including healthy lifestyle habits, cognitive restructuring, mindfulness, and progressive relaxation techniques.

Managing for Health & Productivity

Wednesday, August 13

What do the most talented employees need from their workplace? How do the world's greatest managers find, focus, and keep talented employees? What does a strong, vibrant workplace look like? How does your organization measure up? This training seminar will give you tools to examine the strength of your workplace and discuss ideas for bringing out the best performance in your workgroup.

Basic EAP Training

Wednesday, April 16 & Wednesday, October 1

This training seminar includes the EAP Orientation for employees and describes the partnership between the supervisor and the EAP. In addition, the program outlines how to recognize a troubled employee, document performance, effectively confront declining performance, and make formal referrals to the EAP.

Changing Times for Managers

Wednesday, June 18

The pace of change in our workplace is rapid, and managers are often faced with employees who feel overwhelmed, angry and confused. In addition, managers must deal with their own responses to change. This training seminar explores the cycle of change, the personal impact of change, and how to help employees work through the process of change.

DOT Training for Managers & Supervisors

Thursday, September 4

This training seminar includes 60 minutes of training on alcohol misuse and 60 minutes on controlled substance use. We will cover the physical, behavioral, speech, and performance indicators that supervisors may use to determine reasonable suspicion per Section 382.307 of the Department of Transportation Regulations. This is also a useful training seminar for anyone wanting to learn the signs and symptoms of substance abuse.

Helping Managers Manage

2003 Management Training Series

Diversity in the Workplace

Wednesday, November 19

The scope of diversity in the workplace includes race, gender, ethnicity, age, personality, cognitive style, tenure, organizational function, and more. It also includes how people think and interact with others as well as how they perceive themselves. During this presentation we discuss diversity issues in the workplace and provide the skills necessary to manage your work environment effectively.

Emotional Intelligence

Wednesday, December 10

Successful business leaders and outstanding performers do not owe their success to their IQs or even their job skills, but to how well they manage feelings and how they interact and communicate with others. These leadership resources are known collectively as *emotional intelligence*, and there is a growing awareness of their value in the workplace. This training seminar will help you define emotional intelligence, identify the core competencies associated with it, and develop an understanding of the relationship between leadership styles and emotional intelligence.

Registration

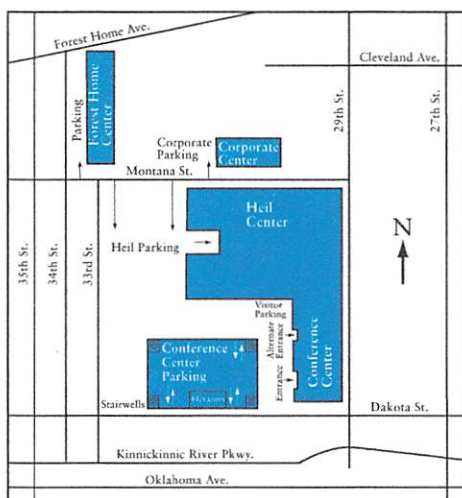
We invite you to send up to five managers or supervisors per training seminar. If you would like to send more than five attendees, please contact your account executive to discuss providing the training on-site.

Location: **Aurora Conference Center**
2920 W. Dakota Street
Milwaukee, WI
Sycamore Room
(414) 647-3500

Registration: 8:45 A.M. with continental breakfast

RSVP by calling (414) 257-3949

Time: 9:00 – 10:30 A.M.



Where to Park:

The Dakota parking structure is located west of the Aurora Conference Center 2920 W. Dakota Street. There are two entrances to the Dakota structure. Please use the 2nd floor entrance on the southwest side of the parking structure. The gate will be open to enter/exit the structure.

ALL OTHER GATES WILL BE DOWN

Enter the Aurora Conference Center through the entrance located on the west side of the building, accessible from Dakota between the parking structure and 29th Street. Take the elevator to the Conference Center on the 3rd floor.

NO TOKENS REQUIRED TO ENTER/EXIT STRUCTURE

Employee Assistance Program Training Menu

Employee Orientation and Fundamental Supervisory Training

Employee Orientation (approximately 30 minutes)
(Also available on power point)

An overview of the Employee Assistance Program designed to help participants understand the benefit and feel comfortable using the program. This orientation covers:

- ♦Description of the EAP benefit
- ♦Different types of problems an EAP can address
- ♦How to access the benefit
- ♦Advantages of using the EAP

Fundamental EAP Supervisory Training (approximately 1 hour)
(Also available on video and power point)

This training includes the EAP Orientation and describes the partnership between the supervisor and the EAP. In addition the program outlines:

- ♦How to recognize the troubled employee
- ♦How to document performance
- ♦How to effectively confront declining performance
- ♦Formal and informal referrals to the EAP

Advanced Supervisory Training Topics (approximately 1 – 1.5 hours)

Changing Times For Management

The pace of change in our workplaces is rapid, and managers are often faced with employees who feel overwhelmed, angry and confused. In addition, they must deal with their own responses to change. The training emphasizes:

- ♦The Change Cycle
- ♦Understanding the personal impact of change
- ♦How to help employees in the change process

Communications at Work

This program will help participants communicate with others in ways that will prevent communications breakdowns -- at work *and* at home. It includes how to identify different personality styles and how to conduct yourself to make your role in the communications process more effective and satisfying. Participants will learn a practical formula for evaluating and improving their own communication style.

Substance Abuse Training for Managers and Supervisors (D.O.T. version is 2 hours)

This training identifies the signs and symptoms which may indicate an employee is impaired. Supervisors and managers making "fitness for duty" or "reasonable suspicion" decisions benefit from this informational forum. This training also may also be formatted to satisfy the D.O.T. annual training requirements.

Workplace Violence

In light of recent experiences of tragic events in workplaces around the country, this program was developed to help managers and supervisors recognize the signs of trouble on the job that could lead to violence and what can be done to prevent escalation to tragic proportions.

Harassment Awareness for Managers

This seminar describes types of harassment and the negative impact these behaviors have on the workplace. Case scenarios and step by step instructions help managers recognize and respond to harassment. (One hour)

Aurora Employee Assistance Program



Aurora Health Care

EAP INFORMATION AND CONSENT

I, _____, _____
(Name of Client) (Date of Birth)

authorize Aurora Employee Assistance Program, 2500 N. Mayfair Rd., Suite 630, Milwaukee, WI, 53226

to obtain from/disclose to _____

(Name/Address/Program and/or Person Taking Disclosure)

Purpose:

Ongoing diagnosis
Treatment planning
Social, vocational, fiscal, or
educational planning
To obtain payment of an insurance claim
Other (specify) _____

Legal
Application for insurance
Disability determination
To report attendance at EAP
assessment

Scope:

Dates of hospitalization
Psychiatric, social, psychological and
other allied health evaluation
Medical history and medications
School reports
Diagnosis
Other (specify) _____

To report attendance at EAP
assessment and agreement to
follow through
Failure to comply with EAP
recommendations
Reports of progress and treatment

I understand that my records may be protected under the federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR Part 2, and cannot be disclosed without my written consent unless otherwise provided for in the regulations. I understand I have the right to inspect and/or receive a copy of the material to be disclosed upon payment of reasonable charges for photocopy service, I also understand that I may revoke this consent at any time, except to the extent that action has been taken in reliance on it, and that in any event, will expire one year following the date of signature unless otherwise indicated.

Date, event or condition upon which consent will expire: _____

Signature of Client

Signature of Guardian

Date

Date

Signature of Witness

White copy to chart. Yellow copy to client.

SAMPLE LETTER OF INTRODUCTION

Dear Current Employee:

Life is filled with change and uncertainty. The responsibilities and demands on our time can seem overwhelming. It happens to all of us, and from time to time we could all use a helping hand. As a benefit for our employees, **ABC Company** is pleased to announce that we are implementing an Employee Assistance Program (EAP) for you and your family members. The program becomes effective on (insert date).

The Aurora Employee Assistance Program is an employer sponsored benefit intended to help with the challenges of balancing work and family issues. The cost of the program is covered by **ABC Company**. The EAP can provide assistance with a wide variety of situations like searching for childcare or researching resources for dealing with an elderly parent. Referrals for legal assistance and money management consultation are also part of the EAP. Of course, you may consider using the EAP when dealing with other life issues such as parenting, jobs, relationships or substance abuse. The EAP is intended to be a resource to help you remain successful in your personal and professional life.

Enclosed is a brochure that outlines the services provided by The Aurora EAP. Please be assured that the benefit is confidential and **ABC Company** will not know who is using it. The only information reported by the EAP is the number of people using the program. No one will know you are using the EAP unless you choose to tell someone. If assistance is needed beyond the services of the EAP, you will be referred to appropriate resources, including those covered by your insurance.

If you have any questions about the EAP, please contact our Human Resources Department or The Aurora Employee Assistance Program at (414) 257-2124, or 1-800-236-3231. We hope you will take advantage of these valuable services and find them helpful in meeting your individual and family needs.

Sincerely,

Authorized Signature
ABC Company

Enclosure

Aurora Employee Assistance Program

✓ Check Out The Enhanced Features on our Website

We are proud of the wealth of helpful information available to you through the Aurora EAP website. Follow these instructions to take a VIRTUAL TOUR.

Access the site: www.Aurora.org/eap

Look under "Information for employees of client companies"

Healthy Solutions for Life:

Our new employee brochure is on-line. This is a helpful overview for employees and family members of the services available through the Aurora EAP.

Access Newsletter:

Archive directory of all prior EAP newsletter articles. Topical education for employees. May be useful discussion/facilitation tool for supervisors with individuals or workgroups.

Tips for Healthy Living:

Feature articles, seasonal in nature. Check back often – topics will rotate.

Helpful Links:

Comprehensive articles & educational information grouped by major categories: Depression, Anxiety, Stress Management, Alcohol & Drug Abuse, Aging & Health, Parenting. Many "hidden" resources & information linked to each title. Try these for a sample . . .

- ✓ **Depression: Choose title: More than the blues: understanding dysthymia.** Article appears in the main "frame" – note the information available on the sidebar – "Your Health". Scrolling down you'll see information on disease conditions, be well articles, health headlines, interactive tools and much more!
- ✓ **Stress Management: Choose title: Massage Therapy Services.** Look at the sidebar for Sports Medicine & Fitness information and resources.
- ✓ **Parenting: Choose title: 15+ make time to listen, take time to talk.** Click on "Listening Dads are Champs". Download the conversation starter cards to discuss trivia, current events and tough topics with your kids.
- ✓ **Websites of Interest:** Referral to other resources on the internet.

Haven't found what you need? Try the search function at the top.

The Website is a great educational & informational resource.
If you need personal assistance call: 414-257-2124 or 800-236-3231.



The Aurora EAP: A free benefit for you and your family

Your employer pays for this service. If you or your family member need assistance beyond the scope of the EAP, you will be referred to appropriate resources.

Our Promise to You

Your privacy is protected in accordance with both federal and state laws regulating mental health and medical treatment records. The Aurora EAP makes every effort to protect your privacy and ensure that your participation in the program is completely confidential.

Program Access

Call (414) 257-2124 or (800) 236-3231 and identify yourself as an employee of this company. Your family members may do the same. Our goal is to insure that your use of the EAP will be convenient, timely, and effective.

The Aurora Employee Assistance Program has locations throughout Wisconsin, the United States and Canada.

The Aurora EAP Web Site

Please visit us at
www.AuroraHealthCare.org/qoto/eap

The Aurora Employee Assistance Program

Since its establishment in 1983, the Aurora Employee Assistance Program has grown into one of the premier EAPs in the country, serving businesses of all sizes throughout North America. We provide confidential, quality services to help employees and their families successfully meet home and workplace challenges.

As part of Aurora Health Care, the Employee Assistance Program is committed to enhancing the well-being and quality of life of the diverse populations we serve through an integrated network of providers addressing the full spectrum of family and workplace needs.

Aurora Health Care is a community-owned, non-profit health care system dedicated to promoting health, preventing illness, and providing state-of-the-art diagnosis and treatment, whenever and wherever we can best meet individual and family needs.

Aurora Employee Assistance Program

For confidential help, call
(414) 257 2124 or
(800) 236 3231

www.Aurora.org/eap



Aurora Health Care®

Introducing the Aurora Employee Assistance Program



Healthy Solutions for Life



Aurora Health Care

Welcome to Aurora's Premier Employee Assistance Program (EAP)

The Aurora EAP has been serving employees and families for more than 18 years. Our dedicated team of professionals is committed to helping you find **healthy solutions for life:** solutions that can help you and your family deal with the complications of your busy lives, solutions that get results — quickly, conveniently and confidentially.

Finding a Better Way

Life is filled with change and uncertainty. The responsibilities and demands on our time can be overwhelming. It happens to all of us. Calling the Aurora Employee Assistance Program can be the first step towards taking charge of a situation that is affecting your health and well-being.

Eligibility

The Aurora EAP is available to employees and family members residing in the household.

How It Works

Help begins as soon as you make the first call for assistance. An EAP specialist will listen to your concerns and ask you relevant questions. Based on your needs, we will immediately:

- connect you with a professional EAP counselor,
- schedule an assessment, or
- link you with a specialist in one of our work-life services.

If a telephone or in-person assessment is indicated, the EAP assessment counselor may offer a variety of suggestions such as referral to a support group, community resource or counseling. Sometimes the assessment counselor's suggestions may be all that is needed to help you resolve your concerns.

When to Use the Aurora EAP

This varies with each individual. Generally, it is wise to seek help when a problem:

- occupies too much of your time,
- interferes with normal activities, or
- persists for more than two-three weeks.

Typical concerns may include:

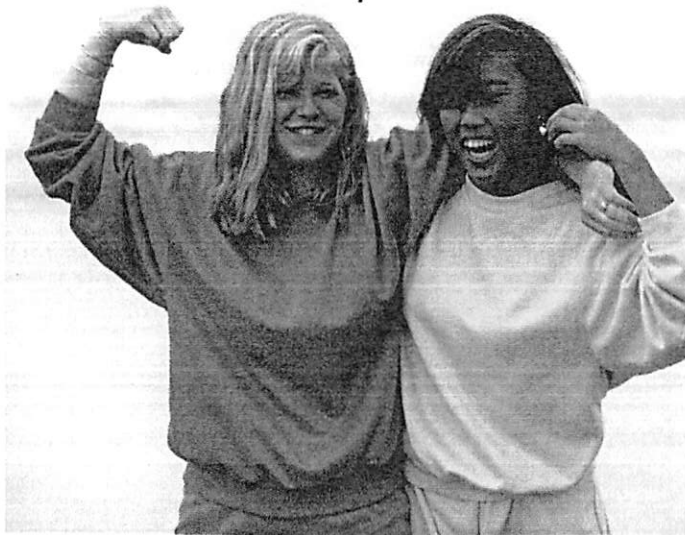
- Adult stresses such as relationship issues, workplace concerns, anxiety and depression
- Marital conflict
- Parent/child problems
- Childhood stresses such as difficulty with school or peers
- Alcohol or drug abuse: yours or a family member's
- Divorce
- Financial pressures
- Caring for aging parents
- Balancing work and family



Specialized Work-Life Services

- **Child Care Consultation, Information and Referral.** Our experts can guide you through the array of options and help you choose the most appropriate resources for your child.
- **Elder Care Information and Referral.** The demands of caring for an aging relative can be overwhelming. Our specialists can assess your situation and connect you with support services for you and your loved one.
- **Budget and Debt Management Services.** Our certified credit counselors can help you take control of your finances, whether you need guidance in developing a budget or a repayment plan to help you get out of debt.
- **Legal Consultation.** If you need legal information or guidance, your EAP will arrange a phone consultation with an experienced attorney who will evaluate your situation and offer solutions.

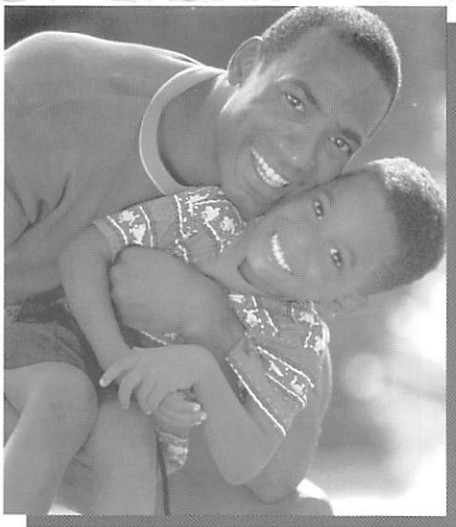
Value friendship.



ACCESS

The Power of Resilience: Do you fold under pressure or come back stronger?

Everyone faces difficulty and adversity in their life. While a problem-free, stressless existence may sound appealing,



ing, it's the challenges and obstacles in life that enable us to grow, learn and develop a sense of mastery over the world around us.

Recall a particularly traumatic time in your life. More often than not, it was also a time that led you to greater self-awareness and shaped who you are today, leaving you stronger and better prepared to cope with whatever the future had in store.

We all know of people who inspire us with their courage and ability to triumph over enormous odds, whether physical handicaps, poverty or an abusive childhood. Other individuals who

seem to begin with all the advantages are overwhelmed by the day-to-day demands of life. So what makes the difference in what people do with the "raw material" of their lives — those who endure and thrive despite hardship, and those who are defeated by it?

What makes the difference is *resilience* — the ability to recover from or adjust easily to misfortune or change, to "bounce back" from difficult experiences, and even be strengthened by them. According to experts, resilience is a quality that can be developed throughout life. Many people exhibit it to an extraordinary degree in their everyday lives. The response to the events of September 11 and the aftermath is an example of ordinary Americans facing up to and accepting a horrific disaster, then choosing to act in a positive, constructive way with optimism and hope for a better future.

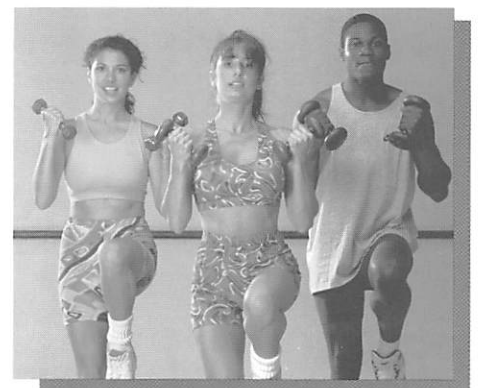
What factors make a person resilient?

Experts cite trusting, supportive relationships as key to resiliency. Many recent studies have looked at strategies for building resilience in children, especially children in chaotic or violent urban settings. Why do many such children succeed at school and in life despite exposure to major, often

chronic life stresses? A caring, committed relationship, whether a parent, teacher, mentor or close friend who offers consistent support and encouragement, seems to buffer children from the effects of a harsh or hostile environment.

Other factors contributing to resilience are the ability to learn from experiences (rather than being overwhelmed by them); a sense of competence and power over one's life; and the ability to problem-solve and remain optimistic, focusing on a future beyond the immediate difficulties.

Flexibility, the ability to imagine and try out other alternatives after experiencing a setback, is an important quality that comes naturally to children but that adults may tend to lose as they get older. Being open to novel,



unexpected solutions helps us remain adaptable and resilient, whether dealing with a crisis or solving new problems.

The American Psychological Association has developed “Ten Ways to Build Resilience” (see sidebar). It’s important to note that effective strategies will vary from person to person; cultural differences, family relationships, how you

“Challenges and obstacles in life enable us to grow, learn and develop.”

communicate feelings and deal with adversity mean that your approach to building resilience will be uniquely your own. You will learn from your own life experience what works best for you,

which is why coping with crises and loss can be so transforming and enriching.

Knowing when to seek outside help is crucial to coping with stress and adversity in a healthy way. Your EAP is here to help you and your family find strength to weather the inevitable changes and struggles you encounter at work and at home.

Call your EAP at
(414) 257-2124 or
1 (800) 236-3231
www.aurora.org/eap

Financial Survival Tips for Tough Times

During an economic downturn, more than ever, knowledge is power. Many people live from one paycheck to the next, without really knowing where their money is going, or what they can do to make the most of the resources they have.

Kathryn Crumpton, manager of Consumer Credit Counseling Service, says that knowing where you stand is the first step to improving your financial situation. “Putting it all down in black and white can be especially helpful for couples, since it gives them an objective starting point for discussing their spending and saving habits, reducing some of the emotions and blaming that often keep couples from even talking about money.” Here’s how to get started:

- List your assets and what each is worth. These include not only the money you have in savings, checking, and retirement accounts, but other less obvious assets, such as collectible, antiques, and your home.
- List your liabilities, including mortgages, credit card debt, car loans, student loans, medical debts, and furniture loans. List all your outstanding debts and the balance you owe on each.
- Determine your net worth by subtracting the total you owe - your liabilities from your assets.

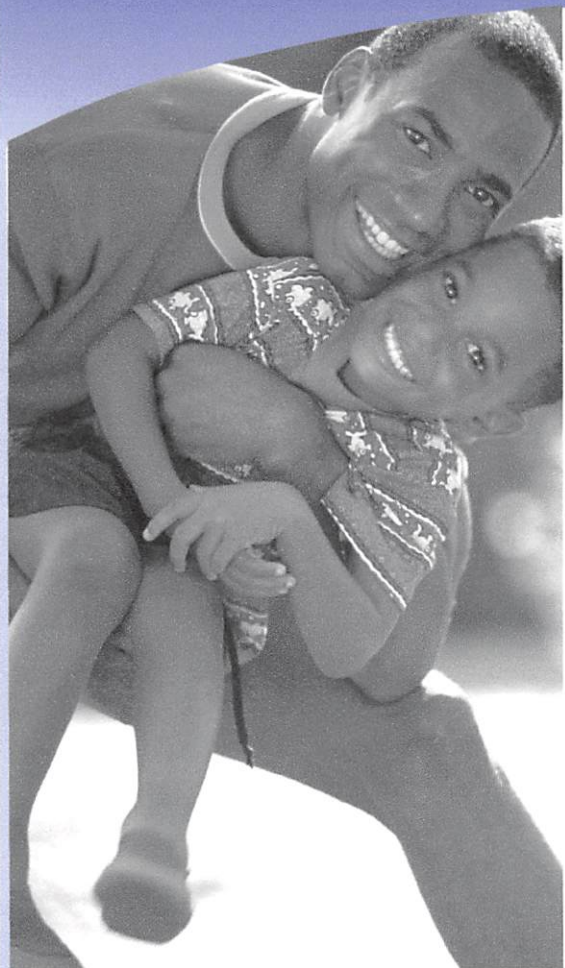
Hopefully, the number you arrive at is positive. If not, it may be time to work on building your assets and paying down your debts. With record-low interest rates, this is a good time to refinance a home mortgage if you haven’t already done so. Also look for a lower interest rate on your car loans and credit cards.

If you’re looking to save money on the family vacation this year, think about a shorter vacation or traveling closer to home. Several day trips (instead of one long trip) could save on motel accommodations and meals if you pack a cooler with a picnic lunch. If you do plan on overnight stays, save on meal expenses by looking for a room or cabin that allows you to do your own cooking. For any vacation, planning ahead is always key. You may find significant savings with coupons for air fares, hotels, car rentals, attractions, and restaurants. Also, decide in advance how much you will spend on souvenirs and other miscellaneous purchases on the road and once you arrive at your destination. This is an ideal time to consider setting money aside in a saving account for next year’s vacation. You’ll enjoy it even more knowing you won’t be paying off vacation bills while you’re holiday shopping!

Ten Ways to Build Resilience

1. **Make connections.** Accepting help from those who care about you – and assisting others in need – is a hallmark of resilience.
2. **Have confidence that you can deal with the crisis.** Stressful events are unavoidable, but you can choose how you respond to them. Look beyond the immediate problem towards a more hopeful future.
3. **Accept change.** Resilient people recognize that life requires us to adapt to circumstances beyond our control and focus our energies on what we *can* change.
4. **Move toward your goals.** Have realistic goals, and do something every day that brings you closer to achieving them. A series of gradual steps can add up to big changes.
5. **Take decisive actions.** Detaching from a stressful situation and hoping it goes away rarely works. Doing what you can to impact a problem gives you a sense of control.
6. **Look for opportunities to grow.** While struggling with a crisis or loss can be painful, it’s these experiences that often lead us to discover who we really are, enhancing our relationships, coping abilities, and appreciation of life.
7. **Maintain a positive self-image.** Have confidence in your ability to solve problems and trust your own instincts.
8. **Keep things in perspective.** Look at the “big picture.” It’s easy to overreact to events that in a broader context simply aren’t worth the stress and anxiety they can cause.
9. **Maintain a hopeful outlook.** Life usually meets our expectations, for good or bad. Focus on what you want, rather than what you fear.
10. **Take care of yourself.** A mind and body that are rested, nourished and cared for will be primed to deal with demanding situations. Many people find writing their thoughts in a journal or meditating are helpful in fostering resilience.

How Resilient Are You?



Resilience helps people adapt to change and bounce back from life's rough spots. Anyone can strengthen their resilience . . . and turn obstacles into opportunities for growth.

Your EAP is here to provide caring, confidential help.

Call your Aurora Employee Assistance Program:

(414) 257-2124 or 1 (800) 236-3231

 **Aurora Health Care®**

www.aurora.org/eap



Aurora Health Care®

Employee Assistance Program

EMPLOYEE EDUCATIONAL & PERSONAL ENRICHMENT SEMINARS (ONE HOUR)

CHANGING TIMES: Tailored to employee groups, this training looks at the strengths we bring to bear when the change process makes us confused, angry, or overwhelmed. Understanding how people respond to change helps us see our responses more clearly, and provides the perspective we need to manage ourselves through the process.

COMMUNICATIONS AT WORK: This is a one-hour version of the Supervisory Training of the same name. The Facilitator describes effective communication, and works with the group to explore the most difficult kinds of situations in which communication can break down. This training offers specific suggestions for keeping workplace communication effective and professional.

RESPECT IN THE WORKPLACE: Respect in the workplace is often compromised by the fast pace in which we all work. This one-hour presentation will assist participants in identifying how they would like to be treated, offer suggestions on how to communicate respectfully as well as how to deal with disrespectful behavior.

FROM STRESS TO STRENGTH: Discuss techniques for remaining resilient during times of change at work and at home. Discover the five key strategies for short-circuiting stress.

SUBSTANCE ABUSE AWARENESS: The theme of this program is to present in layman's terms the facts about drug and alcohol abuse, how dependency happens, what to look for if abuse is suspected and, most importantly, what is being done in today's treatment programs to prevent its often-fatal consequences.

BALANCING WORK AND HOME: Too many demands and not enough time? Balancing work and home obligations is a daily task. This one-hour presentation will help individuals identify their current life balance; assess their priorities and provide options for easing the balance between work and home.

MONEY MANAGEMENT: Participants will learn the basics of financial management from budgeting to debt management. An often-used service of the EAP -- Consumer Credit Counseling Service -- will be explained.

CHILDCARE AND PARENTING: A valuable component of the Employee Assistance Program is the availability of Child Care Referral Services. This seminar explains the service, but also focuses on what it takes for today's working mothers and fathers to approach their roles as parents with less fear and more confidence in their ability to meet the challenges their children or all ages can present.

ELDERCARE: This seminar explains another important benefit of the EAP, the ElderCare Referral Service and the different levels of care available today to our senior and often somewhat dependent adults. Caregivers are given help in understanding and coping with their own stresses in coordinating their care.

DEPARTMENT OF TRANSPORTATION
SAP REPORTING FORM

EMPLOYEE NAME _____

SAP NAME _____

EVALUATION RESULTS

The following treatment recommendations have been made for the above named employee in addition to abstinence from all mood altering chemicals (more than one item may be checked):

- | | |
|----------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Substance Abuse education | <input type="checkbox"/> Residential treatment |
| <input type="checkbox"/> Self-help meetings | <input type="checkbox"/> Intensive outpatient treatment |
| <input type="checkbox"/> Inpatient detox | <input type="checkbox"/> Outpatient Treatment |

The above named employee can be expected to be off work for at least _____ (time period). At the end of this time frame, the employee's compliance with recommendations will be evaluated.

COMPLIANCE WITH RECOMMENDATIONS

- The above named employee **HAS NOT** completed the SAP evaluation.
- The above named client has completed the SAP evaluation, but **is not in compliance** with SAP recommendations.
- The above named **employee has completed the SAP evaluation and complied with the SAP recommendations to date.** She/he is being recommended for a return to duty test and subsequent testing schedule listed below.

SUBSEQUENT TESTING SCHEDULE

_____ Tests during the next _____ months (DOT regulations require a minimum of 6 tests over the course of the first 12 months, to a maximum of 60 months) for:

- poly drug only alcohol and poly drug alcohol only

SAP signature _____ Date: _____

D.O.T. Compliance Coordinator: _____ Date: _____



Aurora Health Care®

Employee Assistance Program

Employee Satisfaction Survey

If you have used the EAP, please indicate your level of satisfaction with our service. By answering the questions below, you will help us evaluate and improve our services. *Your response to this survey is confidential.*

	Strongly Agree	Agree	Disagree	Strongly Disagree
I received prompt, courteous attention when I called the EAP for my appointment.				
I was satisfied with the time and location of my appointment.				
My EAP counselor was helpful and professional.				
The referral or suggestions provided by the EAP were helpful.				
Overall, I am satisfied with the service I received from EAP.				
I would use the EAP again, if necessary.				
I would recommend the EAP if there was someone who needed help.				

Please add your suggestions or comments:

We want to know if the EAP has been helpful to you. To assist us, please answer the following questions:

	Much Better	Better	Same	Worse	Much Worse
My productivity at work is:					
My relationships at work are:					
My personal life is:					

Concerns or Problems?

Give us a chance to resolve any problems with your service. Please indicate your name and phone number so that we may contact you or call us at 800-236-3231.

Name:	Phone:
Best Time to Call?	May we leave a message? Yes No

EAP Utilization Report Customer Guide

Each report is based on the activity that has occurred within one quarter. It also includes YTD information.

Telephone Activity

All telephone calls are counted as activity. In all telephone activity categories, the number of contacts is the same as the number of persons. The number is based on the actual number of call that occur in the reported quarter.

Appointments Scheduled

- The number of calls when an appointment was scheduled.

Employee Information Calls

- The number of calls made by an employee or family member to inquire about the EAP or requested information.

Supervisor Referral Consultations

- The number of calls made by a supervisor and/or HR representative to set up a formal referral.

Management Consultation

- The number of calls made by a supervisor and/or HR representative to consult with an AE about employee or organizational issues. Includes follow-up calls for supervisor referrals.

Intake as Assessment (applies only to companies with Access model)

- The number of calls made by an employee or family member to directly access behavioral health care benefit.

No Show/Cancellations

- The number of appointments made that were not kept due to a cancellation or a no show.

Assessments

Assessments represent the number of episodes, not sessions, that occur within the reported quarter. In behavioral, financial and supervisory referral assessments, the number of persons may exceed the number of contacts since family members, friends, union reps, etc. may attend the assessment. In Elder and Child Care assessments, the number of contacts and persons will be the same because the assessment is a phone activity.

Behavioral

- All mental health, family, or other general EAP assessments.

Financial

- An assessment due to financial issues.

Elder Care

- An assessment of elder care needs.

Legal

- A legal assessment with an attorney

Child Care

- An assessment of childcare needs.

Supervisor Referral

- An assessment that is the result of a formal or mandatory referral by a supervisor and/or HR representative.

On-Site Activity

Represents all activities that occur at the employer site. The number of activities and attendees are included in the report.

Consultation

- Meetings to discuss formal referrals or organizational issues.

CISD

- Formal Critical Incident Stress Debriefing.

Crisis Intervention

- Immediate on-site response due to a worksite incident.

Promotional Event

- Attendance at a health fair or other employee event.

Training

Represents all trainings provided for supervisors and employees that occur at the employer site or at the EAP site. The number of training sessions as well as the number of attendees are included in the report.

Employee

- Training sessions for employee attendees

Supervisor

- Training sessions for supervisor attendees

Utilization

Utilization is broken down into four individual rates as well as an aggregate total rate. It is based on the current number of employees located at the top of the first page.

Telephone Activity

- Number of Contacts/Number of employees

Assessments

- Number of Assessments/Number of employees

On-Site Activity

- Number of Persons/Number of employees

Training

- Number of Persons/Number of employees

Total

- Number of telephone Contacts, Assessment cases, On-site and Training attendees/Number of employees

EAP Utilization Report

All EAP Employers

1st Quarter, 2001 -- (113,089 Employees)

	Quarter		Year-to-date	
	Contacts	Persons	Contacts	Persons
Telephone Activity				
Appointments Scheduled	1,440	1,440	1,440	1,440
Employee Information Calls	1,227	1,227	1,227	1,227
Supervisor Referrals Consultations	121	121	121	121
Management Consultations	884	884	884	884
Intake as Assessment	217	217	217	217
No Show / Cancelations	112	112	112	112
Totals	4,001	4,001	4,001	4,001
Assessments				
Behavioral	855	1,131	855	1,131
Financial	54	57	54	57
Elder Care	7	7	7	7
Legal	81	82	81	82
Child Care	36	36	36	36
Supervisor Referral	81	84	81	84
Totals	1,114	1,397	1,114	1,397
On-Site Activity				
Consultation	10	58	10	58
CISD	10	94	10	94
Crisis Intervention	26	81	26	81
Promotional Event	1	300	1	300
Totals	47	533	47	533
Training				
Employee	53	1,175	53	1,175
Supervisor	28	520	28	520
Totals	81	1,695	81	1,695
Utilization (Reported in %)				
Telephone Activity		3.54		3.54
Assessments		0.99		0.99
On-Site Activity		0.47		0.47
Training		1.50		1.50
Totals		6.50		6.50

1st Quarter, 2001 -- (113,089 Employees)

	Contacts for Quarter	Contacts for Year-to-date
Management Consultations		
Crisis Call	10	10
Resource Request	140	140
Employee	210	210
Organizational	149	149
Supervisor Referral Follow-up	304	304
Training Preparation	44	44
Promotion / Planning	27	27
Totals	884	884
Mandatory Supervisor Referral		
Failed Drug Screen	26	26
Alcohol, Drug Suspicion	13	13
Absenteeism	31	31
Tardiness	21	21
Productivity	8	8
Accidents	1	1
Complaints	14	14
Harassment	3	3
Workplace Conflict	14	14
Violation of Policy/Procedures	10	10
DOT	1	1
Totals	142	142
Formal Supervisor Referral		
Failed Drug Screen	3	3
Alcohol, Drug Suspicion	6	6
Absenteeism	11	11
Tardiness	6	6
Productivity	2	2
Complaints	14	14
Harassment	2	2
Workplace Conflict	10	10
Violation of Policy/Procedures	5	5
DOT	2	2
Totals	61	61
Primary Problems		
Abuse (spouse, child, parent)	11	11
Alcohol	55	55
Anxiety	63	63
Behavioral	33	33
Child Care	36	36
Depression	164	164
Drug	46	46
Elder Care	8	8
Family	106	106
Financial	57	57
Legal	77	77
Marital	120	120
Medical	5	5
Occupational	65	65

All EAP Employers

1st Quarter, 2001 -- (113,089 Employees)

	Contacts for Quarter	Contacts for Year-to-date
Primary Problems		
Relationship	57	57
Stress	99	99
Not Reported	109	109
Totals	1,111	1,111
Referral Recommendations		
Child Care Service	33	33
Community Education	13	13
Consumer Credit Counseling	20	20
Elder Care Service	4	4
Inpatient	9	9
Legal	6	6
Outpatient	605	605
Residential	1	1
Short Term	187	187
EAP Only (Nothing Further)	324	324
Totals	1,202	1,202
Training - Employee		
Communications at Work	3	3
Employee Orientation	21	21
Other	5	5
Respect in the Workplace	11	11
Stress Management	11	11
Substance Abuse Awareness	2	2
Totals	53	53
Training - Supervisor		
Basic	22	22
DOT	1	1
Harassment	1	1
Other	4	4
Totals	28	28
Client		
Employee	857	857
Spouse/Partner	95	95
Child	145	145
Other	14	14
Totals	1,111	1,111
Gender		
Female	693	693
Male	418	418
Totals	1,111	1,111

All EAP Employers

1st Quarter, 2001 -- (113,089 Employees)

	Contacts for Quarter	Contacts for Year-to-date
Age		
Under 26	262	262
26 - 35	284	284
36 - 45	323	323
46 - 55	185	185
Over 55	55	55
Not Reported	2	2
Totals	1,111	1,111
Employee Status		
Hourly	545	545
Salaried	261	261
Commissioned	10	10
Retired	2	2
Unemployed	6	6
Not Reported	287	287
Totals	1,111	1,111
Occupation		
Craft Workers / Skilled	57	57
Laborers / Unskilled	59	59
Office / Clerical	158	158
Officials / Managers	82	82
Operatives / Semi-skilled	46	46
Professional	279	279
Sales Workers	36	36
Service Workers	61	61
Technicians	77	77
Not Reported	256	256
Totals	1,111	1,111
Length of Employment		
Less Than 6 Months	71	71
6 Months to 1 Year	109	109
1 Year to 5 Years	339	339
5 Years to 10 Years	147	147
More than 10 Years	200	200
Not Reported	245	245
Totals	1,111	1,111
How Did You Hear About EAP?		
Supervisor	132	132
Co-worker	59	59
Union	1	1
Human Resources	208	208
Family Member	38	38
EAP Orientation / Training	133	133
Promotional Materials	126	126
Not Reported	414	414
Totals	1,111	1,111

Aurora Employee Assistance Program Leadership Team

Cheryl Lipscomb, M.Ed, Director

Cheryl Lipscomb, our Director, has more than 15 years experience in the employee assistance field and more than 25 years experience in Administration and Program Management. She has a Masters Degree in Educational Psychology from the University of Western Ontario, Canada.

Cheryl has successfully developed an internal EAP from the ground up and has also successfully integrated an internal and external EAP. She has held numerous positions within the employee assistance field, including Account Executive, Training Manager, Assessment Counselor and Business Development Manager.

As the Director of the Aurora EAP, Cheryl works closely with leadership, corporate HR, organizational development, and quality assurance to insure that the Aurora EAP surpasses employer and employee expectations.

Janet Schirtzinger, CICSW, CMFT, Manager, Clinical Services

Ms. Schirtzinger has 25 years experience in behavioral health. She has a Masters degree in social work and post-graduate training in marriage and family therapy. Her experience has been in a wide variety of settings including community services, hospitals, and mental health clinics. She has managed programs for elementary age children, teenagers, and outpatient behavioral health services. She has been with the Aurora EAP since 1994.

The Manager, Clinical Services is responsible for all services that are provided to employee clients. These include call group services, EAP assessments, and behavioral health management.

Lisa Urness, MS, CEAP, Manager, Operations

Lisa has a Masters degree in Educational Psychology from the University of Wisconsin-Milwaukee. She is a Certified Employee Assistance Professional and has 12 years in the Employee Assistance Program field. Lisa has worked in various professional capacities prior to joining the Aurora EAP in 1995. She was an Account Executive for FEI Behavioral Health providing consultation for several national accounts. Prior to receiving her Masters degree, she worked as a Benefit Administrator for a large international firm in Chicago, Illinois.

As the Manager, Operations for the Aurora Employee Assistance Program, Lisa directly supervises the Account Executive team. In this role, she provides consultation and direction to the team as they serve over 160 customers.

Cheryl Mealey, BS, CHES, Business Development

Cheryl is a certified health education specialist with more than 20 years of experience in health promotion, wellness, integrated benefits, employee assistance, training and health management consulting. A wellness program under her direction was among the first in Wisconsin to earn the Gold Well Workplace Award.

Cheryl has worked for a number of Fortune 500 companies including manufacturing and insurance companies prior to joining the Aurora EAP in 2001. She has served as both a board member and officer of the Wellness Council of Wisconsin.



Employee Assistance Program
Assessment Counselor Specialties

All EAP Assessment Counselors have specialized training in General Practice, Workplace Issues, EAP Services & Brief Sessions.

Beckley, Darlene, LMFT

Family Therapy, Christian Counseling, Grief/Bereavement, Marital/Divorce, Sexual Abuse, Women's Issues

Clark, Brian, LCSW, CADC

Adults, Adolescents, Family Therapy. Substance Abuse, Marital/Divorce, Affective Disorders, Anxiety Disorders.

Fluhr, Bernie, LCSW, LMFT

Adults, Family Therapy. Affective Disorders, Anxiety, Divorce, Marital/Couples, Adult Survivors of Sexual Abuse

Hach, Jana, LCSW, CADC

Adults, Geriatrics, Marital, Grief, Gay/Lesbian, Chronic or Terminal Illness

Halling, Susan, LCSW, LMFT, CADC

Adults, Family Therapy. Anxiety Disorders, Substance Abuse, Crisis/Trauma, Head Injury, Post Traumatic Stress, Stress Management.

Jessen, Grace, LCSW

Adults, Young Adults, Chronic or Acute Illness, Grief and Loss, Abuse, Independence or Identity Issues, Women's Issues, Late Life

Longreen, Margot, LCSW, CADC

Adults, Adolescents. Substance Abuse, Marital/Divorce, Affective Disorders, Anxiety Disorders, Women's Issues.

Moster, Kim, LPC, CADC

Adults, Adolescents. Substance Abuse, Grief/Bereavement, Personality Disorders, Post Traumatic Stress, Women's Issues.

O'Hara, Barbara, LCSW

Adults, Couples, Family Therapy. Marital/Divorce, Affective Disorders, Grief/Bereavement, Step/Blended Families, Women's Issues.

Rubin, Ned, PsyD

Substance Abuse, Gambling, DUI Assessments, Addictions, Dual Diagnosis, Bi-polar, Gay/Lesbian Issues

Schirtzinger, Janet, LCSW, LMFT

Family Therapy, Adults, Children, Adolescents, Family Violence, School Related Problems, Step/Blended Families

Schneider, Roger MS, CEAP

Adults, Substance Abuse, Crisis/Trauma Issues, Stress Management

Seder, Barb, LCSW

Marital/Couple Communication, Women's Issues, Borderline Personality Disorders, Short-Term, Grief & Loss, Sexual Abuse

Sittler Nelson, Sue, LCSW

Adults. Eating Disorders/Body Image, Affective Disorders, Anxiety Disorders, Stress Management, Women's Issues.

Stewart, Carole, LCSW

Children, Parenting, School-related Problems, Affective Disorders

Aurora Employee Assistance Program

Account Executive Team

Carrie McEvoy-Ripp, M.S.W.

Carrie received her Bachelor of Arts degree in Psychology and her Masters degree in Social Work from the University of Wisconsin-Milwaukee. Carrie has over 12 years experience in the behavioral health field.

Carrie has worked in the Employee Assistance Program field for over 7 years. She joined the Aurora Employee Assistance Program in 1998 as an Account Executive. Carrie is exceptionally skilled in providing work place consultation. She also specializes in creating and delivering training presentations for both employees and managers.

Lori A. Morton, M.S.

Lori has a Masters degree in Vocational Rehabilitation Counseling from University Wisconsin-Milwaukee. Lori has 3 ½ years of Employee Assistance experience.

Before joining the Aurora Employee Assistance Program team as an Account Executive in 2001, Lori worked at National Employee Assistance Services as an Employee Assistance Counselor. Her primary role was that of providing telephonic assessments to a variety of clients. Additionally, Lori provided in-person assessments and short-term counseling to clients.

Lori is currently teaching an Industrial Psychology class at Milwaukee School of Engineering. Lori's current area of expertise is Conflict Management.

Max Radcliffe, MS

Max has a Masters degree in Rehabilitation Counseling from UW-Milwaukee. He is a Certified Rehabilitation Counselor (Retired). Max has over ten years experience in the field of behavioral health. Max joined the Aurora Employee Assistance Program team in 1998.

Max has worked with a variety of populations including impaired professionals, dually diagnosed men (primary psychiatric and secondary substance abuse diagnoses), and hearing impaired substance abusers in a variety of settings including residential and inpatient. Max also has worked in sales, marketing and business development in the pharmaceutical and healthcare industries.

Max has a special interest in DOT (Department of Transportation) matters and conducts Supervisory Training. Max believes that every employee is worth helping and that every effort should be made to help EAP client companies retain their most valuable resource, their people.

Aurora Employee Assistance Program
Account Executive Team
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Mike Rupsch, LCSW, LPC, CADC

Mike has a Masters degree in Human Development Counseling from Sangamon State University (now University of Illinois, Springfield) in Springfield, Illinois. He is a Licensed Clinical Social Worker, Licensed Professional Counselor and Certified Alcohol and Drug Counselor for the state of Wisconsin. Mike has over 13 years of experience in the behavioral health field.

Before joining the Account Executive team at the Aurora EAP in 2002, Mike was a Program Psychotherapist for Aurora Psychiatric Hospital for over 8 years. He brings a solid practical and theoretical background in behavioral health treatment to the Aurora EAP. His move to the EAP field was precipitated by a strong desire to be involved professionally in early intervention in the behavioral health field.

Mike has a special interest in utilizing cognitive therapy skills and deep relaxation training to help employees and organizations cope with the many challenges in the work world today. He has a strong belief that individuals need practical knowledge and skills to negotiate change on a daily basis.

Clinical Call Group Staff – Experience

Ericka Booker - Lead, Intake

Associate degree in Human Services. Bachelor Degree in Human Services.

2 years experience in EAP, 4 years of experience in customer service.

6 month internship at Family Service of Milwaukee providing social work assessments. Volunteer experience at YMCA providing counseling and support for 4th grade students. 2 years experience as a Certified Nursing Assistant.

Bonnie Grangaard, BS

B.S. in Social Work, UWM

18 years experience in EAP and behavioral health settings.

10 years experience with EAP intake and 3 years of EAP Resource & Referral in Work/Family. 5 years as caseworker for public assistance clients with multiple social problems, providing referrals to broad scope of community resources.

Maria Gonzalez

13 years experience customer service in social service/behavioral health settings.

Spanish speaking. 4 years customer service experience at Aurora EAP, 10 years administrative assistant work at Family Service of Milwaukee, and 17 years administrative assistant work at Legal Action of Wisconsin.

Nina Hughes, BA

B.A. in Clinical Psychology, Alverno College w/ supports in philosophy and professional communications. Currently enrolled in a Psy.D program for Clinical Psychology.

2 years experience in EAP and behavioral health internships.

1 ½ years of internship experience with children, specifically at-risk adolescents and cognitively disabled children ages 1-8 yrs in community agencies. Experience in community settings as a volunteer with schizophrenic adults, day care children, and as a day camp counselor.

Kelly Faust, BA – Network Coordinator

Bachelor of Arts, Currently enrolled in a Psy.D program for Clinical Psychology.

5 years experience in EAP and other behavioral health settings

2 years with EAP, providing phone intake. 2 years inpatient unit experience. Other job experience includes in-person intakes and 1 year student researcher doing phone and in-person interviews with children and adults.

Aurora Health Care was designed around a single idea: There is a better way to deliver health care. Finding a better way begins with identifying the needs of our customers and creating customized solutions that address the full range of each company's needs. Listening to our customers, assessing and anticipating their needs, and exceeding their expectations have been the cornerstone of the Aurora Employee Assistance Program's business philosophy since our establishment in 1983.

In addition to the EAP, Aurora has a complete range of Business Solutions available, allowing each company to customize a seamless continuum of integrated services that address the total health care needs of their employees. Aurora's Business Solutions include:

Prevention and Wellness Services

- Executive Health Program
- Total Heart Care
- Total Health Employee Wellness Program
- Aurora Complementary Medicine
- Aurora Health-Link
- Aurora Senior Services

Services covered under Employee Group Health Insurance

- Aurora Behavioral Health Services
- Aurora Disease Management
- Aurora Women's Pavilion

Work-Related Injury Services

covered by Workers' Compensation Insurance

- Aurora Occupational Health
- Aurora Rehabilitation Services

Find out how the Aurora Employee Assistance Program can work with your company to find creative solutions to your business needs. Give us a call today.

Aurora Employee Assistance Program

(414) 257 3949 or

(800) 511 4804

www.Aurora.org/eap



Aurora Health Care®