



# New Jersey Turnpike Authority

1 TURNPIKE PLAZA - P.O. BOX 5042 - WOODBRIDGE, NEW JERSEY 07095  
TELEPHONE (732) 750-5300

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September 14, 2021

## TO ALL PROPOSERS:

RE: Request for Proposals  
Employee Assistance Program  
RM-156654

### Responses to Inquiries

Dear Sir/Madam:

Below are the New Jersey Turnpike Authority's ("Authority") responses to inquiries received with respect to the above-referenced Request for Proposals ("RFP").

### Responses to Inquiries:

1. Proposal Schedule. There is one week between the submittal deadline (September 16) and finalist (September 23) selection. How much consideration of non-incumbent vendors will there be?

**ANSWER: Full consideration is given to all Proposers.**

2. Section III – Scope of Services. C. Detailed Scope, Question 1: Provide diagnostic assessments of troubled employees and eligible dependents and make referrals to treatment facilities or practitioners in the community. Referral will be coordinated through the Authority's Health Benefits provider. Does this mean anything beyond trying to ensure that referrals are made to medical plan network providers?

**ANSWER: Referrals to providers in network.**

3. Section III – Scope of Services. C: Detailed Scope, Question 6: Provide a counselor on pertinent subject matter, ability to travel to the site 24/7 upon request. Can you clarify what this means and how it would be accommodated?

**ANSWER: In the event of specialized training, a critical incident or sudden death of an employee, the need for EAP services could be requested to respond in a very timely manner to meet with members of our workforce at Authority Headquarters and/or a field location.**

4. Section IV. RFP Response, Evaluation Factors and Criteria. C. Fee proposal. Can you provide your current vendor and their fees?

**ANSWER: New Directions Behavioral Health. \$1.65 PEPM**

5. Section III – Scope of Services. Are there utilization statistics on the current EAP program?

**ANSWER: See attached reports.**

6. Section III – Scope of Services. Are there any utilization statistics on diagnostic assessments?

**ANSWER: See attached reports.**

7. Section III – Scope of Services. How many employees needed written follow up?

**ANSWER: This information was not maintained by Human Resources.**

8. Section II – Administrative and Contractual Information. Item P. Are there specific diverse business requirements associated with this contract?

**ANSWER: There is no required percentage for SBE/DVOB/MBE/WBE. However, the Authority strongly encourages SBE/DVOB/MBE/WBE participation to the extent possible.**

9. Section II – Administrative and Contractual Information. Item P. If there are diverse business requirements, what are they (i.e. MBE, WBE, LGBT, etc.) and the association percentages?

**ANSWER: See Answer to #8.**

10. Section II – Administrative and Contractual Information. Item P. Are there local business requirements associated with this contract?

**ANSWER: See Answer to #8.**

11. Section V: Insurance Item B. Additional Requirements Question 2. All insurance policies shall specify that territorial limits shall be on a worldwide basis, or as agreed with the Authority; and All insurance companies providing coverage shall be authorized to do business in the State of NJ and maintain AM Best rating A-VII or better. Will the Authority agree to allow us to use our ‘Captive’ for the GL and Primary Managed Care Insurances?

**ANSWER: In the past, the Authority has agreed to the use of a captive to provide certain lines of insurance in limited circumstances. Proposer should provide additional information regarding the captive with their proposal, which the Authority will review.**

12. Do you require the chosen vendor to have a brick and mortar location in NJ for EAP?

**ANSWER: No.**

13. Who is the current EAP provider and how long have they been providing services to the organization?

**ANSWER: New Directions Behavioral Health. The initial contract was a three-year contract, with two (2) 1-year extensions. In addition, the Authority requested two (2) six-month extensions.**

14. Please provide the current rate and a rate history throughout the contract term for the EAP.

**ANSWER: For the 5-year contract term 2015 to 2020, the rate was \$1.25 PEPM, and for the current extension the rate is \$1.65 PEPM.**

15. Is there a budget allotment or a not to exceed amount for your EAP?

**ANSWER: No.**

16. Are electronic signatures acceptable?

**ANSWER: Yes, electronically signed forms are acceptable. As a precaution against the spread of COVID-19; in lieu of a notary public, the Authority will accept the following statement above the signature line: "I certify, under penalty of perjury under the laws of the State of New Jersey, that the foregoing is true and correct".**

17. How many hours of the following services are included within the current EAP contract per year?

- a. Onsite training/orientation/educational seminars.

**ANSWER: 35 hours.**

- b. Onsite health fair/event participation

**ANSWER: Virtual participation and electronic materials provided in contract year.**

- c. Onsite critical incident support events (# events/# hours)

**ANSWER: Approximately two (2) events, 8 hours.**

- d. Webinar training

**ANSWER: 12 webinar training.**

- e. DOT SAP cases

**ANSWER: Pay by SAP.**

18. How many total hours of the following services were utilized in each of the last two (2) years?
- a. Onsite training/orientation/educational seminars.

**ANSWER: 12/1/2020 to 11/30/2021 – 14 hours**  
**12/1/2019 to 11/30/2020 – 4 hours**  
**12/1/2018 to 11/30/2019 – 26 hours**  
**12/1/2017 to 11/30/2018 – 36 hours**

**Please note that onsite and virtual seminars significantly decreased as a result of the pandemic. Prior years had significantly more hours utilized.**

- b. Onsite health fair/event participation

**ANSWER: Provided electronic materials, no onsite participation.**

- c. Onsite critical incident support events (# events/# hours)

**ANSWER: 12/1/2020 to 8/31/2021 – No onsite CIRs, 14 Management consultations.**  
**12/1/2019 to 11/30/2020 – No onsite CIRs, 6 Management consultations.**

- d. Webinar training

**ANSWER: 12/1/2020 to 8/31/2021 – Authority employees attended 18 of the 18 monthly webinars available on the New Directions website.**  
**12/1/2019 to 11/30/2020 – Authority employees attended 17 of the 24 monthly webinars available on the New Directions website.**

- e. DOT SAP cases

**ANSWER: 12/1/2020 to 8/31/2021 – 1 DOT SAP**  
**12/1/2019 to 11/30/2020 – 1 DOT SAP**

19. Please provide copies of 2019 and 2020 EAP utilization reports. If reports are not available, please provide the following for each of the last 2 years:

- a. Number of employees on which the report is based

**ANSWER: Annual Utilization Report attached.**  
**12/1/2019 to 11/30/2020 based on 2,006 employees**  
**12/1/2018 to 11/30/2019 based on 1,980 employees**

- b. Total number of clinical cases

**ANSWER: 12/1/2019 to 11/30/2020 – 55 cases**  
**12/1/2018 to 11/30/2019 – 92 cases**

- c. Total number of work-life cases

**ANSWER: 12/1/2019 to 11/30/2020 – 5 cases  
12/1/2018 to 11/30/2019 – 12 cases**

Total number of clinical sessions

**ANSWER: Not available.**

20. Please provide insight into the condition of the workforce. Are there specific issues facing your workforce (i.e. stress, morale, etc.) and HR?

**ANSWER: As with most workforces during this pandemic, stress is an issue. Training and counseling are both a priority to support our workforce.**

- a. Have there been any major events in the last year (i.e. reductions in force, critical incidents, etc.)?

**ANSWER: The major events are the current pandemic, diversity and inclusion, working remotely, and balancing home and work life issues.**

21. What are the top 3 most important services you want from your EAP?

**ANSWER: Urgent response, Counseling, Training and Life Support and knowledge of best practices to keep the Authority abreast of real time events in the industry.**

22. What will be required of the clients we list as references?

**ANSWER: References may be called by the Evaluation Committee to discuss working relationship and satisfaction with services provided.**

- a. Will you conduct a telephone interview, require a written reference response, etc.?

**ANSWER: If necessary, telephone interviews would be conducted.**

23. Who is your health plan provider and is the plan self-funded?

**ANSWER: Horizon Blue Cross Blue Shield of New Jersey. Yes, the plan is self-funded.**

24. On a scale of 1-5 with 5 being the highest, how would you rate your current vendor?

**ANSWER: This question is not relevant as it does not relate to the RFP document or clarify the Scope of Services.**

25. Section C.1 states: Provide diagnostic assessments of troubled employees and eligible dependents and make referrals to treatment facilities or practitioners in the community. Referral will be

coordinated through the Authority's Health Benefits provider. Can you elaborate on how referrals are to be coordinated through the Authority's Health Benefits provider?

**ANSWER: The exact answer is hard to quantify because at times an employee and/or spouse and/or dependent goes directly to the EAP without any involvement of the Human Resources Department for substance/behavioral health treatment. The selected vendor will be provided a list of in-network treatment facilities and should coordinate with the employee/spouse/dependent when the situation arises for the appropriate in-network treatment facility based on services needed.**

- a. We make referrals to counselors within our affiliate network, coordinating directly with the member. Are you needing these referrals to go through the Authorities benefits providers only?

**ANSWER: Yes, referrals should be made to network providers. This does not have to necessarily be the case for referrals for the included initial free visits that require no out-of-pocket expense for the employee. Employees must be told if the initial referral is for an out of network provider, so they can make an informed decision if they wish to continue with that provider. These providers must be vetted.**

26. Section C.4 states: Provide a 24-hour crisis toll-free hotline staffed by a clinician qualified to admit an employee to necessary facilities. Recorded messages or answering services are not acceptable substitutes. Can you elaborate on the admission of an employee to necessary facilities?

**ANSWER: In an urgent, or life threatening situation, a qualified clinician must be able to call a local and qualified in network facility, whether it be a hospital (for immediate attention), or an urgent care, or a rehab facility, etc., with the authority to have the employee admitted to that facility.**

- a. We do not control admissions to facilities, as in hospitals or rehab facilities or the like. Is this what you are referring to?

**ANSWER: Yes, and we prefer network facilities in the State of New Jersey.**

- b. If not, please provide details of the meaning, or describe current services.

**ANSWER: See answer #26a.**

27. Section C.4a states: An employee with an acute problem will be seen by a counselor no later than 24 hours after contact. In acute cases, we provide the member with contact information of a counselor that has availability within 24 hours. It is up to the member to call and schedule an appointment. Is this acceptable?

**ANSWER: No, this is not acceptable. The information should be provided to the member, but the counselor is responsible to make contact with the member.**

28. Section C.6 states: Provide a counselor on pertinent subject matter, ability to travel to the site 24/7 upon request. Is this service expected to be included in the PEPM rate, or as a fee for service?

**ANSWER: Per occurrence, included in the PEPM.**

a. What is the current rate for this service?

**ANSWER: \$1.65 PEPM**

b. How many hours of this service is expected annually?

**ANSWER: The hours would depend upon the needs of the Authority.**

c. Would this be for a Critical Incident Response only?

**ANSWER: No**

29. Section C.8 states: Provide informational sessions of the services provided by EAP to include handouts and business cards upon request by the Authority.

a. Are these sessions to be held on-site? Webinar?

**ANSWER: Sessions will be held on-site and via webinar.**

b. Are these included in the 60 hours of training requested?

**ANSWER: No.**

c. If not, approximately how many sessions are expected each year?

**ANSWER: Approximately twelve (12) sessions are expected each year.**

30. Section C.14. Provide management/supervisory personnel training on reasonable cause/suspicion drug and alcohol testing, to include alcohol drug use and its psychological and physical effects.

a. Are these hours included in the 60 training hours?

**ANSWER: No.**

b. If not, how many sessions annually do you have on average?

**ANSWER: On average, there are four (4) sessions annually.**

31. Section C.15 states: Function as the Substance Abuse Professional for the Drug & Alcohol Policy. Must have appropriate certification. Can you elaborate on duties and details of this function?

**ANSWER:** See information on certification and duties associated with becoming a SAP <https://www.naadac.org/sap>.

- a. We provide Substance Abuse Professionals within our network for referral. This can be on a Fee for Service Basis, or we can include a set number in our PEPM. Which would be preferred, and how many cases do you have each year?

**ANSWER:** The Authority would prefer a Fee for Service Basis. In the past, there have been 3 to 5 cases per year.

32. Provide coordination and facilitation of employee insurance providers to pay for on-going treatment services. Provide written follow-up of employees' referral for on-going treatment. Please provide details on this service.

**ANSWER:** Further information and specific details will be provided to the selected vendor and will be handled on a case by case basis.

- a. Do you anticipate that the EAP contacts insurance companies on behalf of the member?

**ANSWER:** Yes, in certain instances the Proposer should coordinate with our insurance carrier to provide referrals and follow up treatment.

33. 21. Section b.17 States: Provide information of your organization's experience in handling matters related to the Federal Regulations for Alcohol and Drug Testing for holders of commercial drivers' license ("CDL"). Confirm that your organization has certified staff members who will assume the responsibilities of substance abuse professional for the Authority for its Alcohol and Drug test programs and policies for CDL and non-CDL employees.

- a. Can you detail the parameters of expectations for this section?

**ANSWER:** This is self-explanatory. We expect the Proposer to have certified staff members, adept in Federal Regulations pertaining to drug and alcohol testing for CDL holders, and those staff members will assume the responsibilities of adherence to those regulations, not perform the actual drug testing.

- b. We provide SAP qualified counselors for referral in DOT SAP cases. We do not perform any drug testing or provide test results. is this acceptable?

**ANSWER:** Yes.

34. Section B.15 states: Describe in specificity how medical supervision of all cases is incorporated to ensure accuracy of diagnosis and treatment and to enhance quality assurance. Please define 'medical supervision'.

**ANSWER:** Depending upon the case required review: a licensed board approved Physician, Psychiatrist, Chiropractor, Dentist and other like medical professionals.



- a. Physicians and Psychiatrists are generally outside the scope of an EAP. Can you detail your current services and expectations regarding this?

**ANSWER: It is acceptable for the Proposer to utilize the services of social workers, psychologists, etc., but should also be prepared to refer an employee to an in network Medical Doctor, as well, if necessary.**

**Proposals are due on Wednesday, September 22, 2021 at 4:00 PM EST.**

Very truly yours,



Dale Barnfield, Director  
Procurement and Materials Management

DB/am

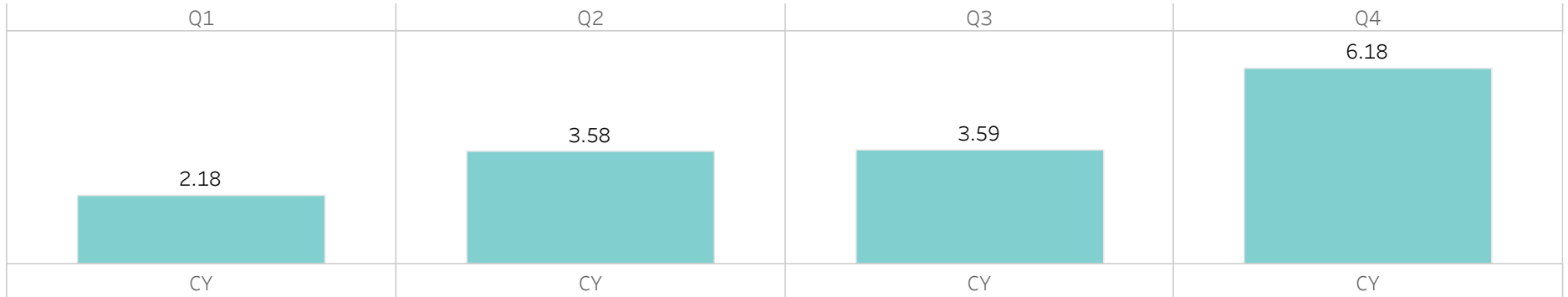
# New Jersey Turnpike Authority

EAP Utilization Report

12/1/2019 - 11/30/2020

# EAP Utilization | New Jersey Turnpike Authority

Comprehensive Utilization  
**current year (CY) 3.88% (78 cases) | 2,006 covered | YTD 3.88%**  
 prior year (PY) 0.00% | 3.88 increase ▲



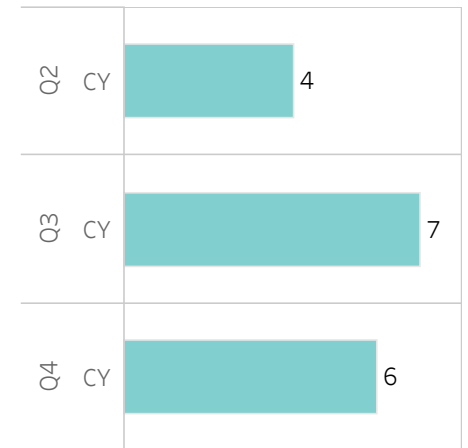
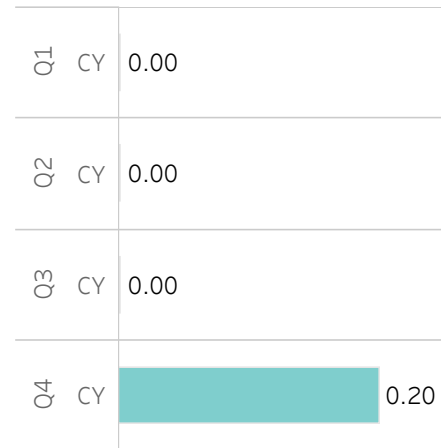
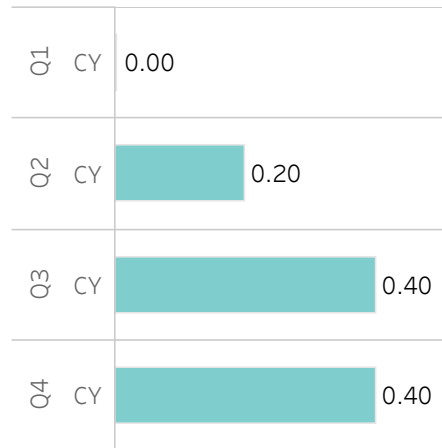
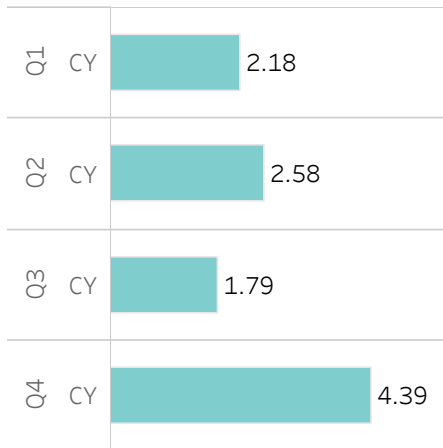
Note: CY, PY, and quarterly utilization rates are annualized. Event counts are not annualized.

**Counseling Utilization**  
**CY 2.74% (55 cases)**  
 PY 0.00% | 2.74 increase ▲

**Work Life Utilization**  
**CY 0.25% (5 cases)**  
 PY 0.00% | 0.25 increase ▲

**Other Clinical Utilization**  
**CY 0.05% (1 cases)**  
 PY 0.00% | 0.05 increase ▲

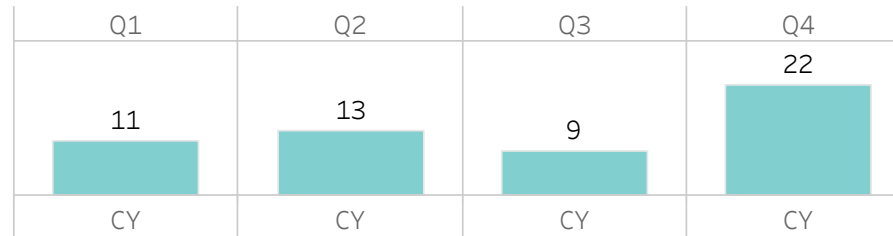
**Event Count**  
**CY 17 events**  
 PY 0 events



## Presenting Issues | Counseling Cases

### Counseling Cases Total

by case open date



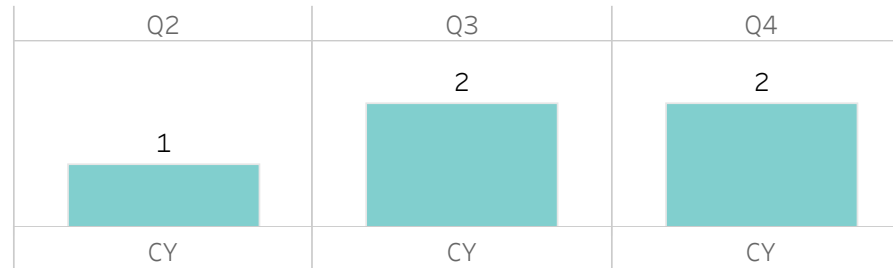
### Counseling Cases by Top Presenting Issues

		CY				
		Q1	Q2	Q3	Q4	Total
<b>Top 15 Presenting Problems</b>	Work Related Issues	6	6		7	<b>19</b>
	Anxiety		2	2	1	<b>5</b>
	Depression	1		1	3	<b>5</b>
	Family	1			4	<b>5</b>
	Substance Use		1	2	2	<b>5</b>
	Stress	1			3	<b>4</b>
	Grief or Bereavement		2	1		<b>3</b>
	Partners/Couples	1	2			<b>3</b>
	Trauma Workplace	1		1	1	<b>3</b>
	Anger Issues			1		<b>1</b>
	Financial Assistance			1		<b>1</b>
	Physical Health				1	<b>1</b>
<b>Grand Total</b>		<b>11</b>	<b>13</b>	<b>9</b>	<b>22</b>	<b>55</b>

# Presenting Issues | Work Life Cases

## Work Life Cases Total

by case open date



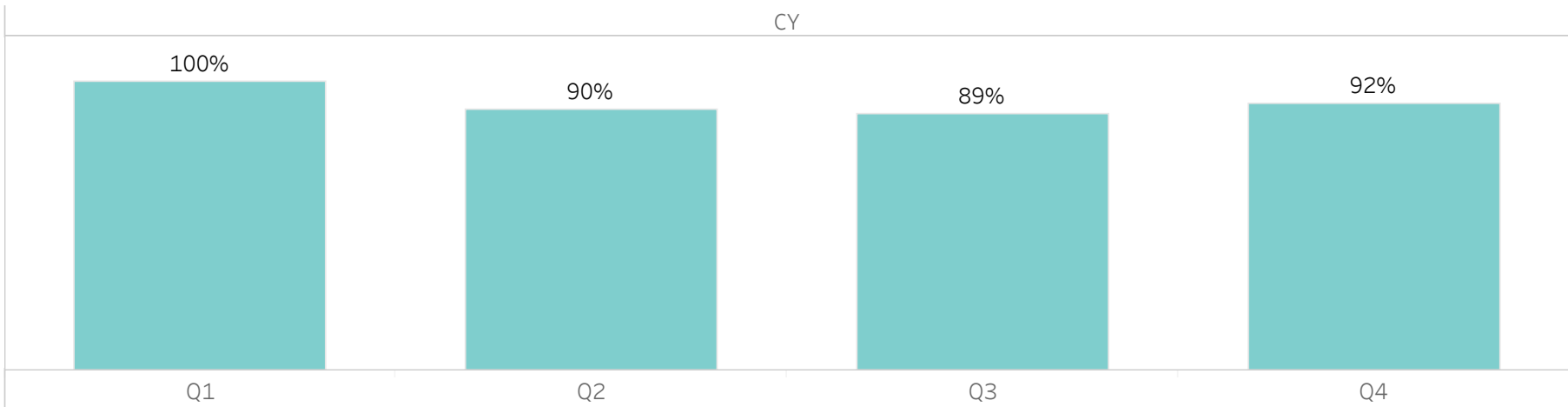
## Work Life Cases by Top Presenting Issues

		CY			
		Q2	Q3	Q4	Total
<b>Top 5 Presenting Problems</b>	Financial Assistance	1	1		<b>2</b>
	Family			1	<b>1</b>
	Family - Legal			1	<b>1</b>
	Legal		1		<b>1</b>
<b>Grand Total</b>		<b>1</b>	<b>2</b>	<b>2</b>	<b>5</b>

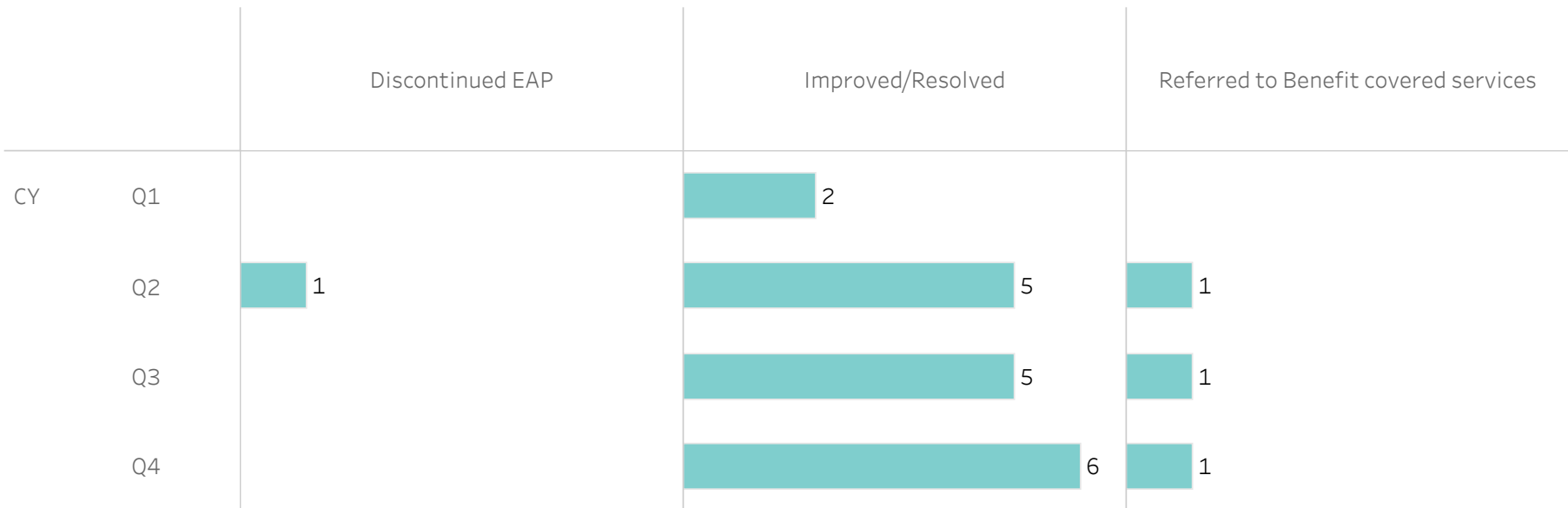
# Closed Cases Summary

## Cases Closed Within EAP

by date closed



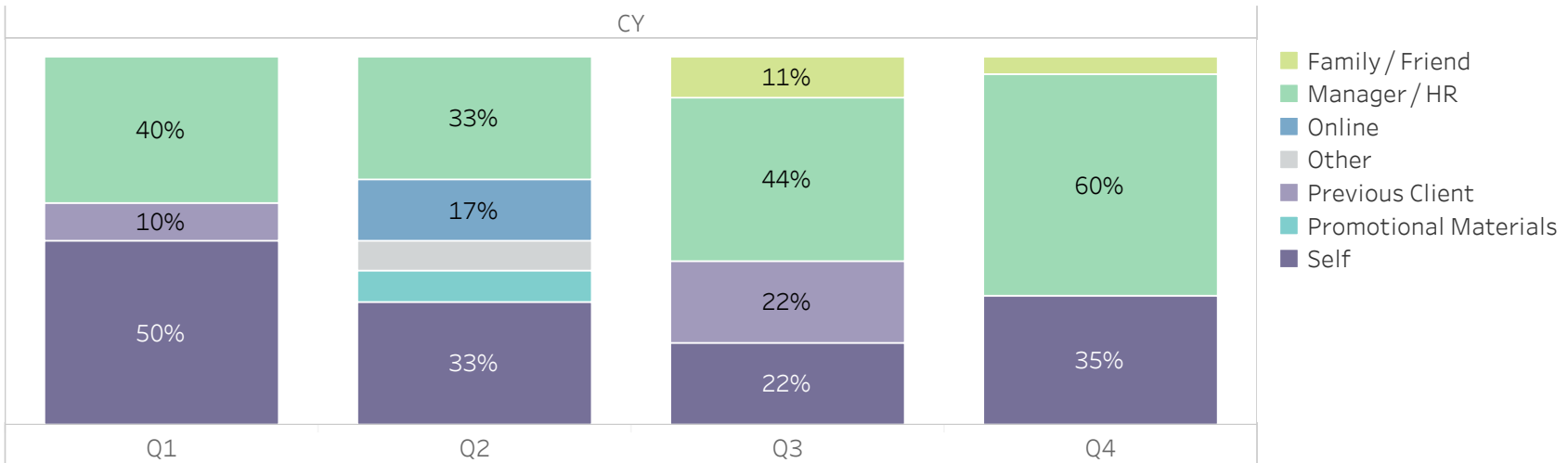
## Cases Closed by Outcome



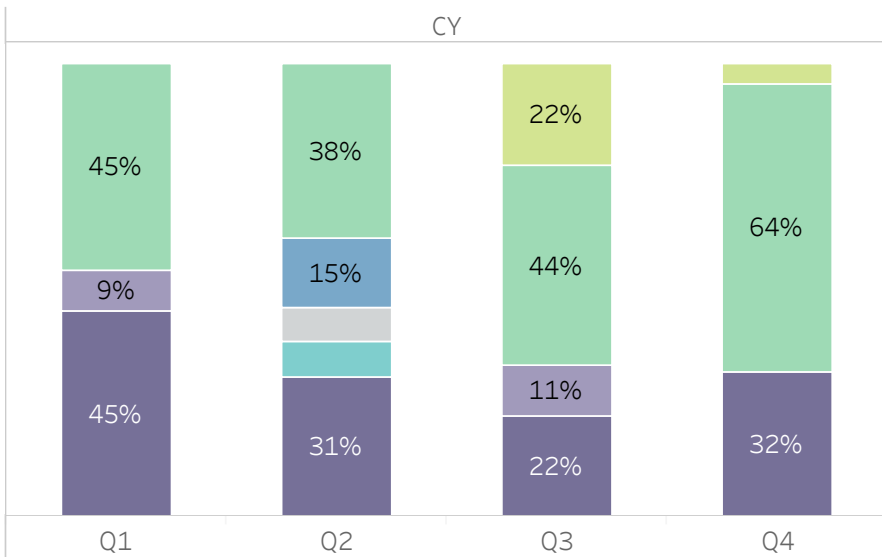
# How did the client hear about the EAP?

## Cases Opened by Referral Source

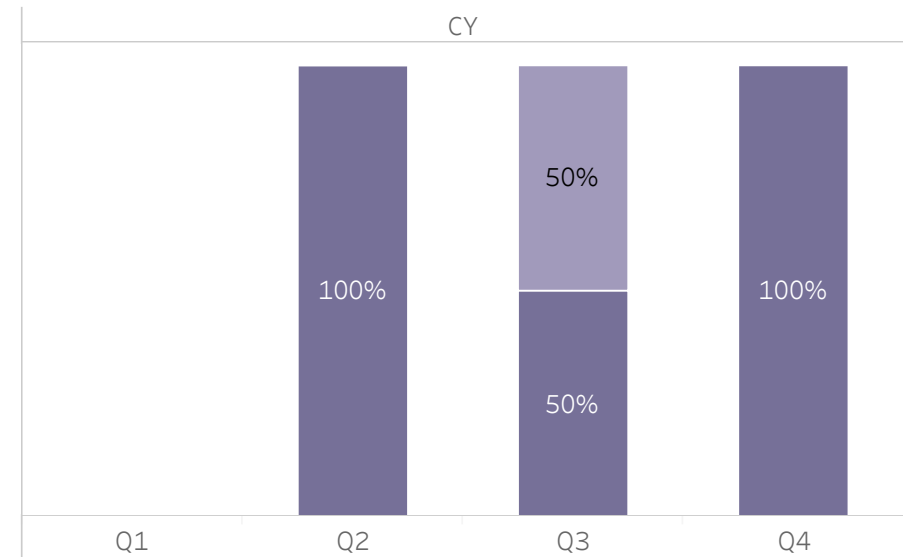
by date opened



## Counseling by Referral Source



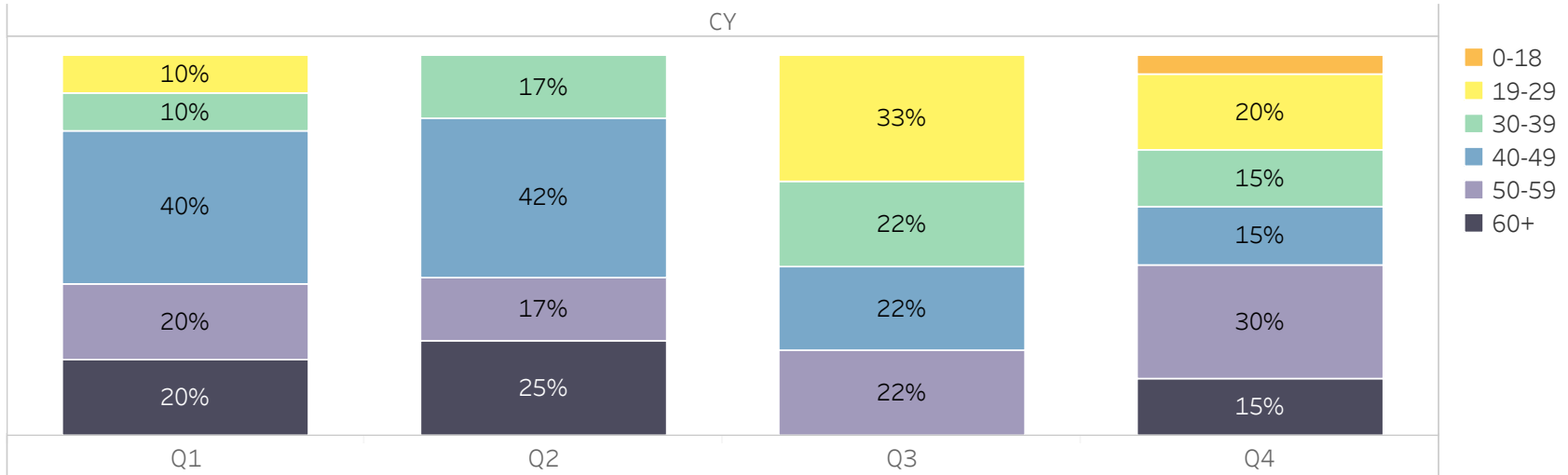
## Work Life by Referral Source



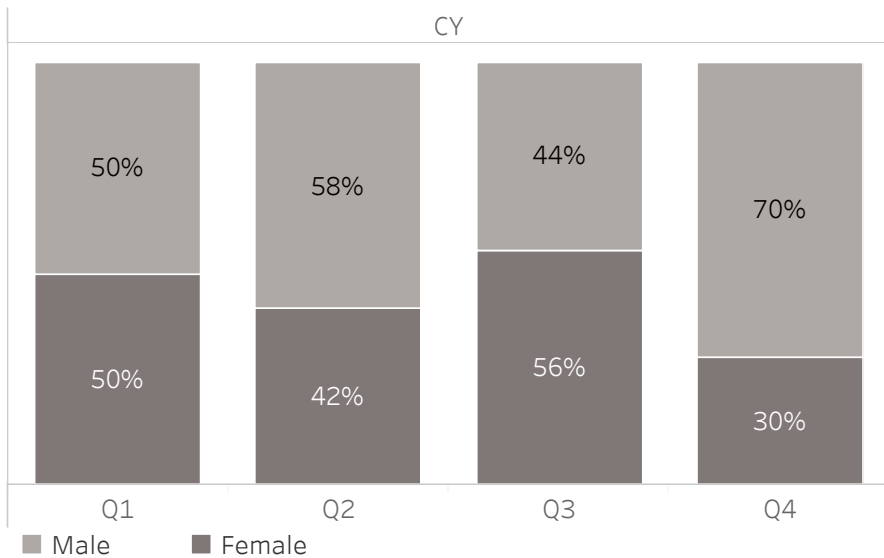
# Other Case Demographics

## Cases Opened by Age Range

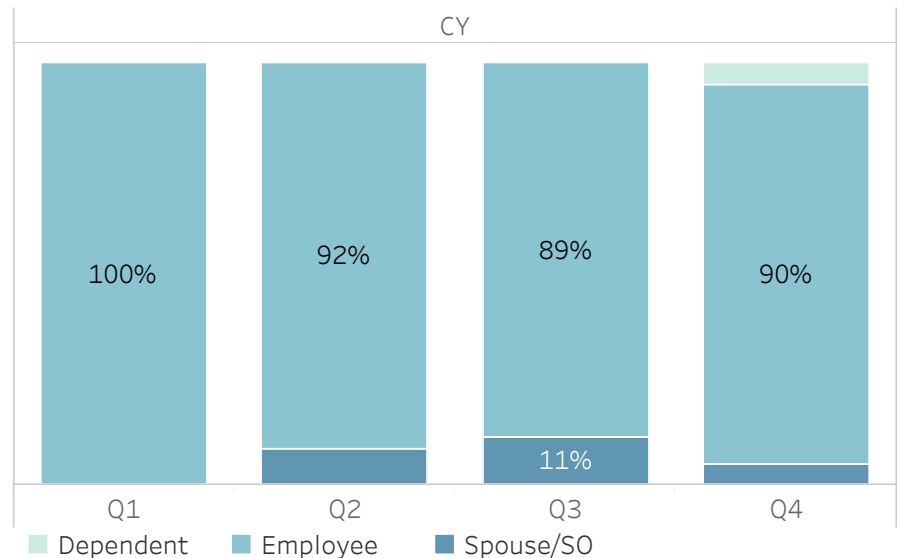
by case open date



## Cases Opened by Gender



## Cases Opened by Client Type





# Critical Incident Response (CIR) Services

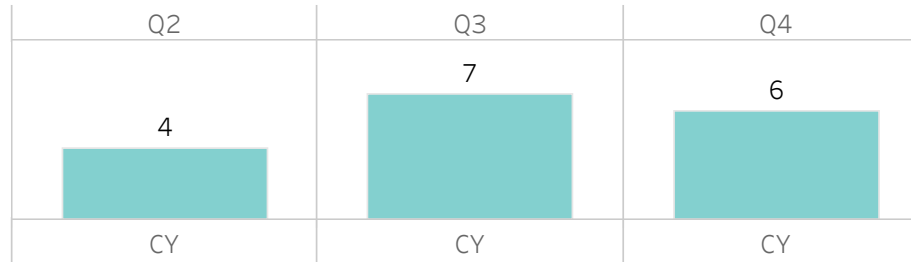
CIR Total  
by service date

CIR Details  
Current Year (CY) only

# Organizational Services: Trainings, Fairs

## Services Total

by service date



## Services Detail

Current Year (CY) only

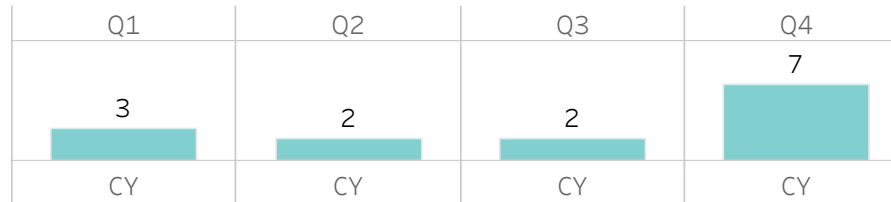
Activity Type	Service Date	Event ID	Service Details	City	State	User Count
Event (Group)	4/15/2020	28690	Monthly All Client Webinar - Managing the Emotionally Reactive Employee			6
	4/22/2020	28802	Monthly All Client Webinar Strategies to Manage Frustration and Anger			4
	5/13/2020	28944	Monthly All Client Webinar Fostering Good Mental Health in Leaders			5
	5/20/2020	28963	Monthly All Client Webinar - Fundamentals of Mental Health			5
	6/17/2020	29152	Monthly All Client Webinar Transgender Awareness & Sensitivity for Leaders			2
	6/24/2020	29153	Monthly All Client Webinar The Importance of an LGBTQIA+ Inclusive Workplace			3
	7/15/2020	29532	Monthly All Client Leadership Webinar - Building Strong Teams			8
	7/22/2020	29585	Monthly All Client Webinar - Managing Chronic Pain			2
	7/29/2020	29644	Living in an Uncertain World: Difficult Conversations about Race			16
	8/19/2020	29770	Monthly All Client Leadership Webinar - Motivating Your Employees			2
	8/26/2020	29850	Monthly All Client Webinar - Combating Perfectionism			2
	9/16/2020	29897	Monthly All Client Leadership Webinar - When Grief Comes to The Workplace			4
	9/23/2020	29898	Monthly All Client Webinar - Coping with Loss in Life			3
	10/21/2020	29899	Monthly All Client Leadership Webinar - Essential Leadership Skills			3
	10/28/2020	29900	Monthly All Client Webinar - Organization for Life			1
	11/11/2020	29901	Monthly All Client Leadership Webinar - Supporting a Remote Workforce			1
	11/18/2020	29902	Monthly All Client Webinar - Waving Worry Goodbye: Strategies to Manage Anxiety			4

# Formal Referral Utilization

includes FMR and DOT/SAP cases, if applicable

## Formal Referral Cases

by case open date



## FMR Cases by Presenting Issue

	CY				Total
	Q1	Q2	Q3	Q4	
Work Related Issues	2	2		6	<b>10</b>
Anger Issues			1		<b>1</b>
Depression	1				<b>1</b>
Substance Use				1	<b>1</b>
<b>Grand Total</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>7</b>	<b>13</b>

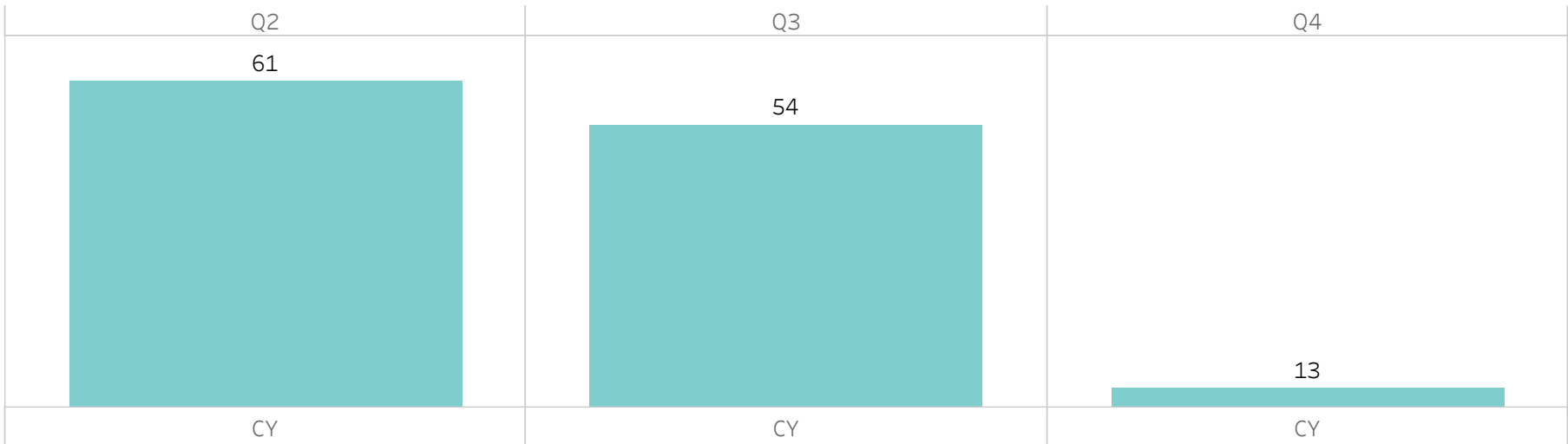
## DOT/SAP Cases by Presenting Issue

	CY				Total
	Q1	Q2	Q3	Q4	
Substance Use			1		<b>1</b>
<b>Grand Total</b>			<b>1</b>		<b>1</b>

# Additional Services

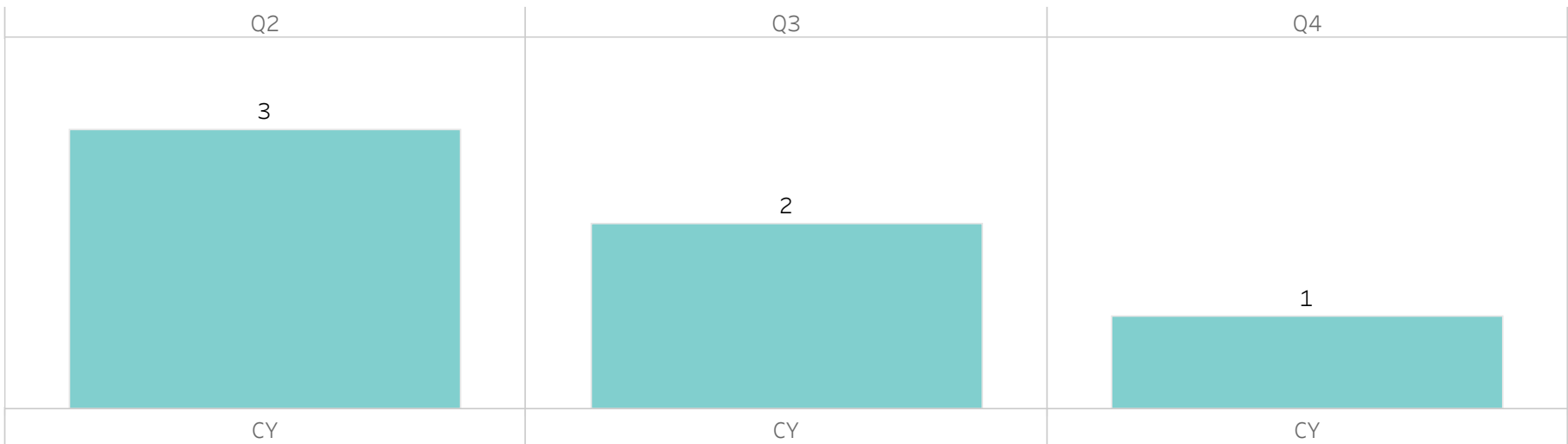
## Website Login Summary

by login date



## Other Services Summary

Management Consultations



## Appendix: Reporting Definitions

### **Current Year (CY)**

Defined by the account's most recent contract start date and the contract end date

### **YTD (YTD)**

Defined by the account's most recent contract start date and the reporting cutoff

### **Prior Year (PY)**

The full year period preceding the current year (i.e.: subtract one year from the most recent contract start and end dates)

### **Covered Count**

The count of employees (or students) covered

### **Comprehensive Utilization Rate**

For a given time frame, count counseling cases, work (or student) life cases, other clinical cases, and number of events and divide by covered count

$[\# \text{ Counseling Cases}] + [\# \text{ of Work (or Student) Life Cases}] + [\# \text{ of Other Clinical Cases}] + [\# \text{ of Events}] / [\text{Covered Count}]$

### **Counseling Utilization Rate**

For a given time frame, total count of counseling cases (includes face-to-face, telephonic, and video) and divide by covered count

$[\# \text{ Counseling Cases}] / [\text{Covered Count}]$

### **Work (or Student) Life Utilization Rate**

For a given time frame, total count of work (or student) life cases (includes legal, financial, and other similar services) and divide by covered count

$[\# \text{ of Work (or Student) Life Cases}] / [\text{Covered Count}]$

### **Other Clinical Utilization Rate**

For a given time frame, total count of other clinical cases (includes coaching, CCBT, and other similar services) and divide by covered count

$[\# \text{ of Other Clinical Cases}] / [\text{Covered Count}]$

### **Event Count**

The total number of organizational services including training events, health/benefit fairs, and critical incident responses (based on the service event date)



**E4HEALTH**

*a bold leap forward in healthcare*

# New Jersey Turnpike Authority

E4

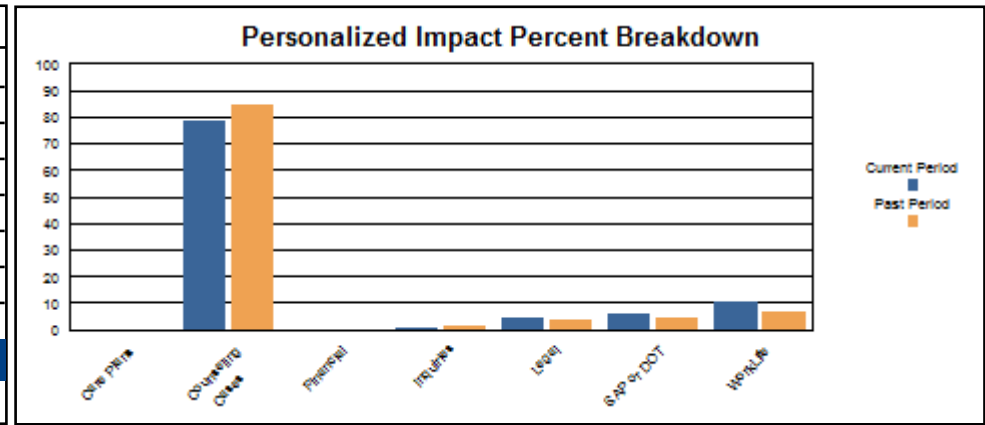
## Utilization Report

Reporting Period: 12/01/2018 - 11/30/2019

Total Population: 1,980

Annualized Utilization Impact	Current Period	Past Period
<b>Total Impact with Web</b>	<b>26.52%</b>	<b>47.27%</b>
Total Impact without Web	26.52%	47.27%
Personalized Impact	5.91%	4.55%
Organizational Impact with Web	36.21%	56.31%
Organizational Impact without Web	20.61%	42.73%

Utilization Impact Breakdown	Current Period		Past Period	
Personalized Impact	Count	Percent	Count	Percent
Counseling Cases	92	78.6%	76	84.4%
Care Plans	0	0.0%	0	0.0%
WorkLife	12	10.3%	6	6.7%
Legal	5	4.3%	3	3.3%
Financial	0	0.0%	0	0.0%
Inquiries	1	0.9%	1	1.1%
SAP or DOT	7	6.0%	4	4.4%
<b>Total</b>	<b>117</b>		<b>90</b>	
<b>Annualized Personalized Impact</b>	<b>5.91%</b>		<b>4.55%</b>	



Organizational Impact	Count	Percent	Count	Percent
Tip Sheets	18	4.4%	29	3.4%
Outreach	63	15.4%	50	5.9%
Training	303	74.3%	745	88.1%
Critical Incident	0	0.0%	0	0.0%
Health Fairs	0	0.0%	0	0.0%
Critical Incident Consultations	0	0.0%	0	0.0%
Management Consultations	24	5.9%	22	2.6%
Webinars	0	0.0%	0	0.0%
<b>Total</b>	<b>408</b>		<b>846</b>	
<b>Annualized Organizational Impact without Web</b>	<b>20.61%</b>		<b>42.73%</b>	
<b>Web</b>	<b>309</b>		<b>269</b>	
<b>Annualized Organizational Impact with Web</b>	<b>36.21%</b>		<b>56.31%</b>	

**Impact Calculation Formulas and Definitions**

**Impact Calculation:** (Number of Impact Items / Number of days in the reporting period) \* 365 / Number of Employees

**Personalized Impact:** Measures the number of individual members receiving assistance for personal use including LifeReach outreach that results in a case

**Organizational Impact:** Measures any contact a member has with the EAP, both with and without web site hits.

**Past Period:** Same reporting period for the previous year.

**Members:** All employees + their significant others and dependent family members.

### Personalized Impact Breakdown

Counseling Case Breakdown	Current Period		Past Period	
	Count	Percent	Count	Percent
Counseling Cases	70	70.7%	64	80.0%
Ref - Formal	29	29.3%	14	17.5%
Ref - Informal	0	0.0%	0	0.0%
Ref - Mandatory	0	0.0%	2	2.5%
<b>Total</b>	<b>99</b>		<b>80</b>	

Legal Breakdown	Current Period		Past Period	
	Count	Percent	Count	Percent
Adoption	0	0.0%	0	0.0%
Civil	3	60.0%	1	33.3%
Criminal	0	0.0%	0	0.0%
Estate	0	0.0%	0	0.0%
Family	2	40.0%	2	66.7%
Real Estate	0	0.0%	0	0.0%
Taxes	0	0.0%	0	0.0%
<b>Total</b>	<b>5</b>		<b>3</b>	

Worklife Breakdown	Current Period		Past Period	
	Count	Percent	Count	Percent
Adoption	0	0.0%	0	0.0%
Child Care	1	8.3%	0	0.0%
Convenience Services	1	8.3%	0	0.0%
Education	0	0.0%	0	0.0%
Elder Care	6	50.0%	0	0.0%
Financial	2	16.7%	0	0.0%
Housing	1	8.3%	2	33.3%
Other	0	0.0%	2	33.3%
Pet Care	0	0.0%	0	0.0%
Transportation	0	0.0%	0	0.0%
Wellness/Healthcare	1	8.3%	2	33.3%
<b>Total</b>	<b>12</b>		<b>6</b>	

Financial Breakdown	Current Period		Past Period	
	Count	Percent	Count	Percent
Bankruptcy	0	0.0%	0	0.0%
Budget Issues	0	0.0%	0	0.0%
Credit Issues	0	0.0%	0	0.0%
Debt Management	0	0.0%	0	0.0%
Hardship	0	0.0%	0	0.0%
Investment	0	0.0%	0	0.0%
Pension	0	0.0%	0	0.0%
Retirement	0	0.0%	0	0.0%
Tax Issues	0	0.0%	0	0.0%
<b>Total</b>	<b>0</b>		<b>0</b>	



### Member Demographic Information Breakdown

Age	Current Period		Past Period	
	Count	Percent	Count	Percent
1-19	2	2.3%	1	1.7%
20-29	8	9.2%	6	10.0%
30-39	17	19.5%	10	16.7%
40-49	20	23.0%	16	26.7%
50-59	25	28.7%	22	36.7%
60-64	10	11.5%	3	5.0%
65 +	5	5.7%	2	3.3%
<b>Total</b>	<b>87</b>		<b>60</b>	

Education	Current Period		Past Period	
	Count	Percent	Count	Percent
Associates Degree	8	9.2%	5	8.1%
Bachelor's Degree	2	2.3%	5	8.1%
Did not graduate	0	0.0%	0	0.0%
High School Graduate / GED	19	21.8%	21	33.9%
Masters Degree	3	3.4%	2	3.2%
Other	1	1.1%	4	6.5%
Professional Degree	2	2.3%	1	1.6%
Undisclosed	52	59.8%	24	38.7%
<b>Total</b>	<b>87</b>		<b>62</b>	

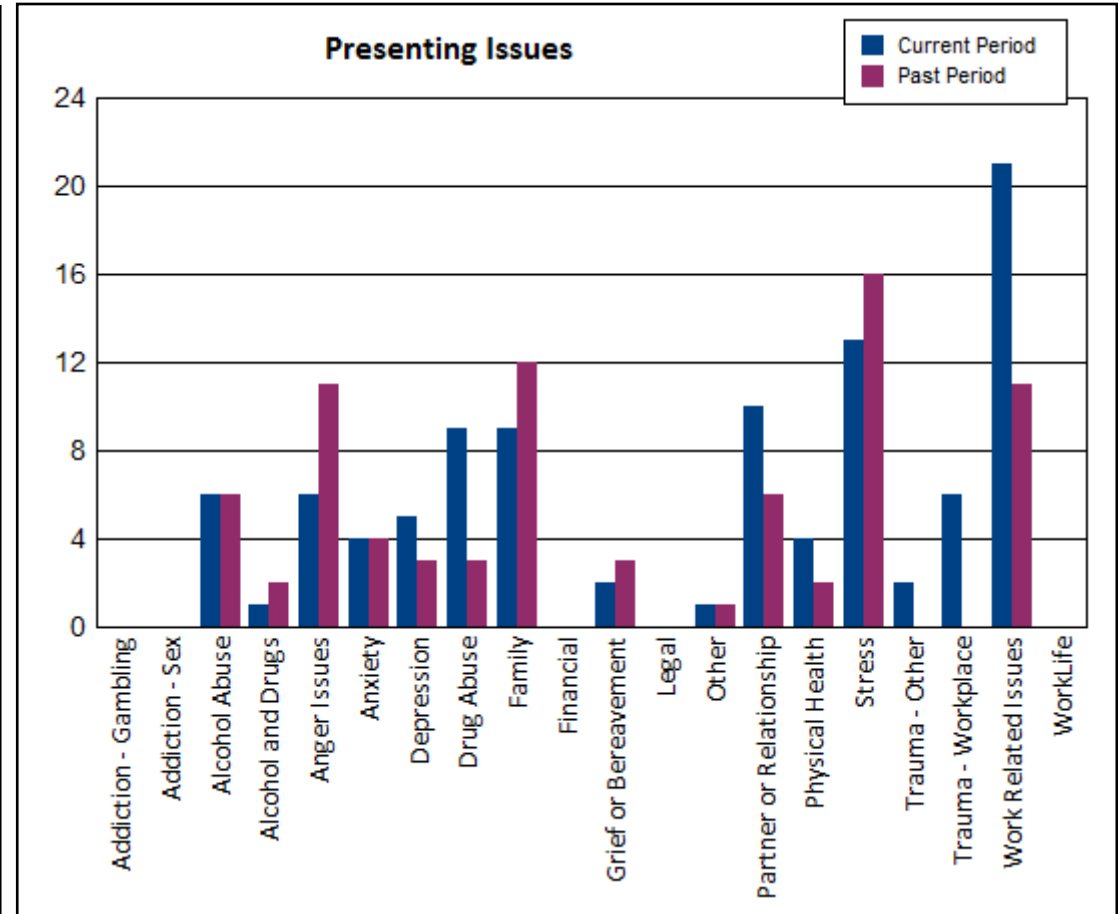
Employee / Dependent	Current Period		Past Period	
	Count	Percent	Count	Percent
Dependent	3	3.4%	0	0.0%
Employee	84	96.6%	62	100.0%
<b>Total</b>	<b>87</b>		<b>62</b>	

Employee Job Category	Current Period		Past Period	
	Count	Percent	Count	Percent
Administrative Support or Clerical	8	9.2%	9	14.5%
Dependent	4	4.6%	3	4.8%
Management or Supervisory	10	11.5%	7	11.3%
Professional Services	6	6.9%	7	11.3%
Sales	0	0.0%	0	0.0%
Service Delivery or Production	23	26.4%	22	35.5%
Technical	2	2.3%	2	3.2%
Undisclosed	34	39.1%	12	19.4%
<b>Total</b>	<b>87</b>		<b>62</b>	

Gender	Current Period		Past Period	
	Count	Percent	Count	Percent
Female	44	50.6%	23	37.1%
Male	43	49.4%	39	62.9%
<b>Total</b>	<b>87</b>		<b>62</b>	

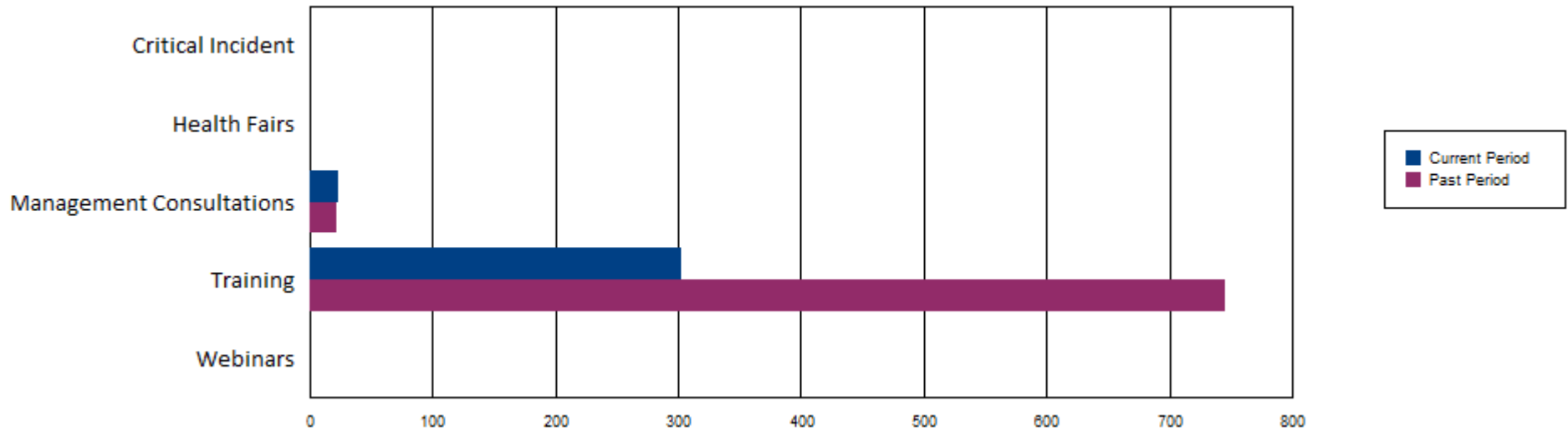
### Presenting Issues

Presenting Issues	Current Period		Past Period	
	Count	Percent	Count	Percent
Addiction - Gambling	0	0.0%	0	0.0%
Addiction - Sex	0	0.0%	0	0.0%
Alcohol Abuse	6	6.1%	6	7.5%
Alcohol and Drugs	1	1.0%	2	2.5%
Anger Issues	6	6.1%	11	13.8%
Anxiety	4	4.0%	4	5.0%
Depression	5	5.1%	3	3.8%
Drug Abuse	9	9.1%	3	3.8%
Family	9	9.1%	12	15.0%
Financial	0	0.0%	0	0.0%
Grief or Bereavement	2	2.0%	3	3.8%
Legal	0	0.0%	0	0.0%
Other	1	1.0%	1	1.3%
Partner or Relationship	10	10.1%	6	7.5%
Physical Health	4	4.0%	2	2.5%
Stress	13	13.1%	16	20.0%
Trauma - Other	2	2.0%	0	0.0%
Trauma - Workplace	6	6.1%	0	0.0%
Work Related Issues	21	21.2%	11	13.8%
WorkLife	0	0.0%	0	0.0%
<b>Total</b>	<b>99</b>		<b>80</b>	

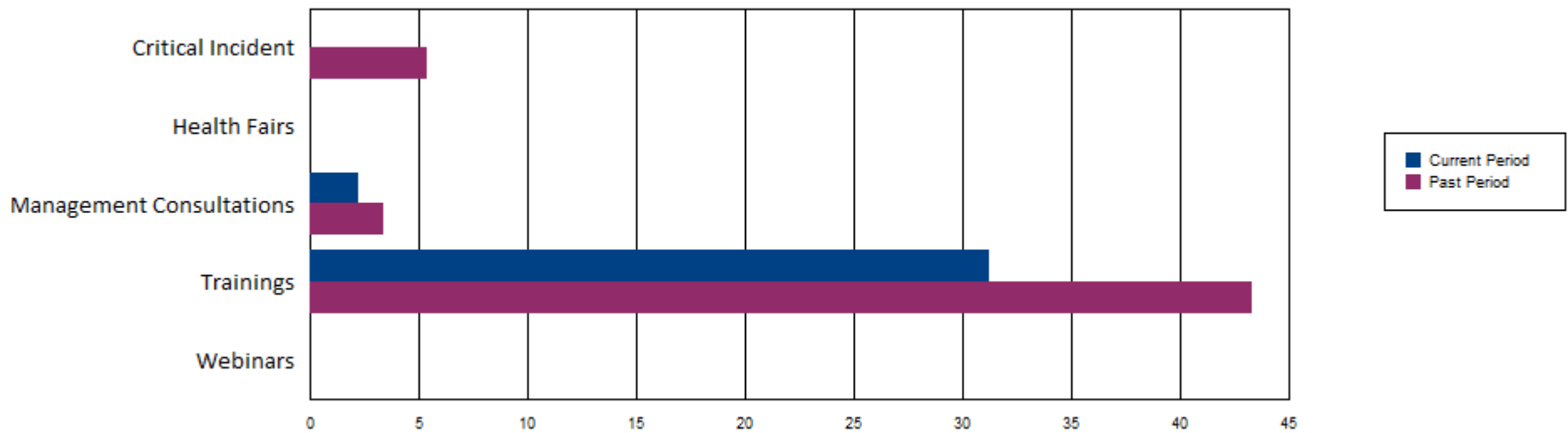


### Organizational Services

#### Participants



#### Hours



### Completed Management Consultations

Consult Date	Consult Reason	Consult Time	Number of Participants
12/3/2018	Management Referral - Formal	0.00	1
12/3/2018	Management Referral - Mandatory	0.00	1
12/18/2018	Management Referral - Formal	0.25	1
1/2/2019	Management Referral - Mandatory	0.08	1
1/10/2019	Management Referral - Formal	0.50	1
1/15/2019	Management Referral - Formal	0.00	1
1/28/2019	Management Referral - Formal	0.08	1
2/4/2019	Management Referral - Mandatory	0.25	1
2/5/2019	Management Referral - Formal	0.25	1
2/19/2019	Management Referral - Formal	0.00	1
3/4/2019	Management Referral - Formal	0.00	1
3/5/2019	Management Referral - Formal	0.25	1
3/6/2019	Management Referral - Formal	0.00	2
3/7/2019	Management Referral - Formal	0.00	1
3/21/2019	Management Referral - Mandatory	0.25	1
4/26/2019	Management Referral - Formal	0.00	1
5/1/2019	Management Referral - Formal	0.00	1
5/3/2019	Management Referral - Formal	0.08	1
6/24/2019	Management Referral - Formal	0.00	1
8/12/2019	Management Referral - Formal	0.00	3
9/30/2019	Management Referral - Formal	0.25	1
Total:		2.25 (hours)	24

### Completed Training List

Training Title	Date	Onsite Time	Consult Time	Number of Participants
Seminar: Respect In the Workplace	12/13/2018	3.00	0.25	30
Seminar: Respect in the Workplace	12/19/2018	2.00	0.25	55
Seminar: Respect In the Workplace - Additional Trainer onsite time	12/19/2018	1.00	0.25	55
Seminar: Respect In the Workplace	12/13/2018	1.00	0.00	30
Monthly All Client Webinar - Paying off Student Loans	1/23/2019	1.00	0.00	9
Monthly All-Client Webinar - Providing Effective Feedback	2/13/2019	1.00	0.00	4
Monthly All Client Webinar - Handling Harassment	3/13/2019	1.00	0.00	10
Monthly All Client Webinar - Leading with Emotional Intelligence	4/17/2019	1.00	0.00	11
Monthly All client Webinar - Emotional Intelligence for Life	4/24/2019	1.00	0.00	5
Seminar: Dealing with Difficult Personalities	6/4/2019	2.00	0.08	6
Seminar: Channeling Your Anger	6/13/2019	1.50	0.08	21
Seminar: Workplace Violence Prevention	8/1/2019	1.50	0.08	8
Seminar: Many Faces of Mental Health	10/23/2019	2.00	0.08	9
Monthly All Client Webinar - Supporting Employees with Personal	5/15/2019	1.00	0.00	3
Monthly All Client Webinar - Navigating Personal Challenges	5/22/2019	1.00	0.00	4
Monthly All Client Webinar - Leading Diverse Generations	6/12/2019	1.00	0.00	4
Monthly All Company Webinar - Communicating Across	6/19/2019	1.00	0.00	4
Monthly all-client webinar - Managing Introverts and Extroverts	7/17/2019	1.00	0.00	4
Monthly All Client Webinar - Maximizing Your Strengths	7/24/2019	1.00	0.00	5
Monthly All Client Webinar - Managing Difficult Employees	8/14/2019	1.00	0.00	4
Monthly All client webinar - Dealing with Difficult Coworkers	8/21/2019	1.00	0.00	2
Employee Orientation - Southern Division	10/15/2019	2.00	0.08	10
Employee Orientation Southern Division	10/16/2019	1.00	0.08	10
Total:		30.00 (hours)	1.25 (hours)	303