



## REPORT TO CITY COUNCIL

**Approved by:**

Wendy Silva  
Wendy Silva, Director of Human Resources

Arnoldo Rodriguez  
Arnoldo Rodriguez, City Manager

**Council Meeting of:** May 20, 2020

**Agenda Number:** B-8

**SUBJECT:**

Health, Dental, Vision, and Employee Assistance Program Insurance Providers for Fiscal Year 2020/21

**RECOMMENDATION:**

Staff recommends the City Council (Council) adopt a Minute Order approving the 2020/21 health, dental, vision, and employee assistance program insurance providers and authorize the City Manager to execute any agreements or related documents.

**SUMMARY:**

The City of Madera offers health benefits to its employees through an IRS Section 125 cafeteria-style plan. The City's Section 125 plan includes health benefits, group life insurance buy-up and accidental death and dismemberment benefits, a medical expense flexible spending account option, and a dependent care flexible spending account option. The health benefits category is further broken down into medical, dental and vision insurance. The City's contribution towards individual employee health insurance is a negotiated item in the various Memorandums of Understanding (MOUs) between the City and bargaining units. All MOUs with the bargaining units state that the City has the right to determine the plan carriers. Employee units have input on plan design.

In addition to standard health benefits as noted above, as a requirement for participation in the Central San Joaquin Risk Management Authority (CSJVRMA), the City provides an Employee Assistance Program (EAP). To date, the City has participated in the EAP plan offered through the CSJVRMA; staff is recommending the City replace the CSJVRMA plan with a plan the City will directly contract for through a local provider.

## **DISCUSSION:**

The City's medical plan consists of a high deductible PPO purchased from a primary carrier with the City self-funding the deductible through what is known as a Wrap Plan (Wrap). The primary carrier processes claims first. If a claim is in-network and applied to the deductible, then the Wrap will pay as secondary payer. This plan structure has proven to be effective at reducing the City's overall cost of health insurance. The primary insurer for the City's medical plan is currently Blue Shield of California (Blue Shield) for the PPO. The Wrap plan is administered by Administrative Solutions, Inc. (ASi) out of Fresno, with funding from the City on deposit in a trust account for claims payment.

In addition to the base medical plan, starting in plan year 2016/17, the City added a Teledoc service to curtail over utilization of Urgent Care and Emergency Room services for basic medical needs, which come at a premium when compared to routine office visits. The Teledoc benefit has been well-received by employees and has been successful in curtailing these high-dollar providers being used for basic medical services. The cost to the City to provide this benefit is \$9.50 per month per employee enrolled. There is no additional premium charged for dependents; the \$9.50 covers the employee and any enrolled dependents. When the service is utilized, the caller is asked where they would have gone to obtain service had they not called Teledoc. Based on this information, it is estimated that the City saved \$47,874 in calendar year 2019 and has saved \$8,532 for the period of January thru February 2020. These are costs that would have been charged to the City-funded Wrap had they not been addressed through telephonic care.

In addition to the medical plan, the City currently offers dental benefits through Ameritas and vision benefits through Superior Vision.

The City's broker obtained quotes for the City's 2020/21 benefit renewal from several providers. The best priced offers were provided by the City's existing providers. Renewal quotes from the City's existing carriers are summarized as follows:

- Blue Shield has offered the City a renewal at a decrease of 8.8 percent compared to current year premiums. This decrease is achieved by increasing the plan deductible and thereby increasing participation in the Wrap layer. This has increased the funding in the Wrap layer, however this is more than offset by the decrease in the primary plan premiums. This is an extremely favorable renewal to the City.
- The proposed cost for the Teledoc service remains at \$9.50 per employee enrolled, per month.
- Ameritas offered the City a dental renewal referred to as a rate pass, meaning no increase in premiums.
- Superior Vision offered the City a two-year rate pass last year, meaning no increase for plan years 2019/20 and 2020/21.

The final benefit contemplated in this report is the EAP. The EAP program provides counseling services to employees as well as services related to work-life balance such as legal advice, financial planning, assistance in locating elder and childcare, and online resources to help individuals find balance in their life and manage their responsibilities. The City is a member of the CSJVRMA, a risk pooling joint powers authority. One of the basic membership requirements of the CSJVMRA is that the City provide an EAP program to its employees. The CSJVRMA has an EAP program that most member-cities participate in. The program is a regional program meant to offer services to all CSJVRMA members from Sonora to Taft. The City has found over time that such a regional benefit is not necessarily a best-fit for providing services to our employees. For this reason, staff asked the City's health broker to obtain quotes for EAP services when they went out for quote on the City's health benefits this year. The broker was able to obtain a quote from Halcyon Behavioral (Halcyon) out of Fresno. The quote from Halcyon offered a base EAP plan that is comparable to the plan design offered by the CSJVRMA, but also offered a wellness benefit add-on. Attachment 1 to this report is a detailed plan offering from Halcyon. In summary, the proposed EAP + Wellness program provides the following benefits:

- 24-hour EAP access
- 6 in-person visits per household member, per year, with additional visits available if needed up to 10 per year
- Unlimited health and emotional fitness coaching
- Unlimited Critical Incident Stress Debriefings
- Unlimited access to web-based eLearning training courses on a variety of topics
- Unlimited access to telephonic and web-based Wellness Coaching, including the following coaching programs:
  - Advanced Physical Activity
  - Personalized Nutrition
  - Sleep Hygiene
  - Prenatal Wellness
  - Financial Fitness
  - Stress Management
  - Tobacco Cessation
  - Weight Management
  - Beginning Physical Activity
  - Heart Health
  - Family Health
- Family, legal, identity theft and financial work/life benefits
- EAP app to access care

The City's primary medical carrier, Blue Shield, has offered the City up to \$10,000 to be used to pay for EAP and wellness benefits. This money will cover the cost of the proposed Halcyon plan. The City averages 240 full time employees, which would equal an annual premium of approximately \$9,800. Any monies not used for the EAP premiums can be used to purchase wellness rewards (i.e. gift cards) to support wellness challenges for City employees.

It is recommended that Council approve renewing services with existing providers for the 2020/21 plan year for medical, dental and vision, and move EAP services to Halcyon Behavioral:

- Blue Shield as primary medical plan provider
- ASi as Administrator for the Wrap Plan
- Call A Doctor Plus as the teledoc provider
- Ameritas Life Insurance Company as the dental provider
- Superior Vision as the vision provider
- Halcyon Behavioral as the EAP+wellness provider

While the current recommendation is to renew the existing plans and model for providing health insurance, it is understood that there is always the need to evaluate options. The City is evaluating participation in a health insurance pool so that more plan design options can be provided to employees. Should this become a viable option, information will be brought back to Council for review and direction.

**FINANCIAL IMPACT:**

Health plan premiums are paid by employees through payroll deductions. The City's contributions toward health insurance are negotiated with the bargaining units and contained in the applicable MOUs.

The City's primary medical carrier has offered a wellness benefit that will cover the proposed premiums for the Halcyon EAP+wellness benefit.

**CONSISTENCY WITH THE VISION MADERA 2025 PLAN:**

The information contained herein is not addressed by the Vision Madera 2025 plan, nor is the information in conflict with that plan.

**ALTERNATIVES:**

The City's health plan year begins on July 1 of each year. Should Council not take action, the existing plans will automatically renew without notice from the City to terminate the plans.

**ATTACHMENTS:**

1. Halcyon Behavioral EAP+wellness proposal



Halcyon  
Behavioral

March 18, 2020

Vic Gunderson  
DMIG/Hub International  
Via email

RE: Employee Assistance and Wellness Program for **the City of Madera**

Dear Vic,

Attached please find an EAP with optional Wellness (Total Well-being EAP) proposal for the **City of Madera**. As outlined in our proposal, key points include:

- Around the clock access to EAP
- 3 visits per household member per six months (6 total visits per year)
- Unlimited health coaching
- Unlimited CISDs (Critical Incident Stress Debriefings)
- Unlimited access to web-based eLearning training courses on a variety of topics with the ability to have employees print certificates of completion
- Unlimited access to web-based Wellness portal, fitness trackers, competitions and smoking cessation
- Robust promotional schedule
- Face to Face meetings and attendance at open enrollment / health fairs, as needed
- Family, legal, identity theft and financial work life-benefits
- Tailored EAP and work-life website
- EAP app available to access care
- A proposed rate of \$1.92 (EAP Only) or \$3.42 (EAP + Wellness) Per Employee Per Month (PEPM) with a three-year rate guarantee. Beyond the first three visits, Halcyon proposes the City of Madera provides up to 10 visits self-funded at a rate of \$100 per visit (paid to Halcyon Behavioral). Halcyon may also provide Bio-metric screenings at an additional cost. Detailed pricing provided upon request.

We truly appreciate the opportunity to submit this proposal for consideration. We are committed to working with the DMIG/Hub team and the **City of Madera** to ensure that members enjoy a generous employee assistance and wellness program. Please contact either me at 559.400.6212 to discuss any aspect of this proposal.

Sincerely,

Keely Coyle  
Account Executive  
Halcyon Behavioral

**EMPLOYEE ASSISTANCE AND WELLNESS PROGRAM PROPOSAL FOR:**

# **CITY OF MADERA**

**MARCH 18, 2020**



**Halcyon**  
Behavioral

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### hal.cy.on

*Adjective: Denoting an idyllically happy and peaceful period of time.*

*Synonyms: quiet-calm-tranquil-peaceful-untroubled*

## ABOUT HALCYON BEHAVIORAL

Halcyon Behavioral helps organizations improve productivity and decrease costs through an integrated suite of behavioral health and wellness programs. Halcyon offers a wide array of innovative services to corporate clients including:

- **Employee Assistance Programs:** We offer solution-focused employee assistance and work-life programs through Halcyon EAP. We help our members confidentially manage personal problems that may affect job performance, while helping employers address employee emotional issues before they manifest into disruptions in the workplace.
- **Health & Wellness Programs:** Our wellness programs help clients get healthier through health assessments, targeted intervention, proactive health coaching and engaging wellness-related competitions and challenges.
- **Behavioral Health Programs:** We provide complete mental health and substance abuse (MHSA) benefits to self-insured organizations through Halcyon Behavioral. Through a confidential and comprehensive telephonic assessment, each member's needs are immediately triaged and referrals to medically appropriate care are provided.



## **Mission Statement:**

At Halcyon, our mission is to provide personalized, high quality behavioral health care and related services, with a focus on outcomes, transparency, and accountability.

## **Executive Summary**

No organization is immune to the human and financial costs of workplace and personal troubles that adversely affect an employee's productivity. Today, over 88% of U.S. companies are taking steps to increase their productivity and manage their health care costs by providing employees and family members with access to Employee Assistance and Corporate Wellness Programs. Halcyon's Employee Assistance and Wellness Program (EAWP) was created to provide behavioral, legal and financial support to employees while encouraging them to make better lifestyle choices to improve their health and well-being through health coaching, incentives and a wealth of other resources.

To maximize the effectiveness of these benefits, the Employee Assistance and Wellness Program needs to be a core component of a company's population health management strategy. Unfortunately, when it comes to the topic of population health, they are often left out of the conversation. This is problematic for several reasons:

- Productivity costs, which are directly addressed by an effective EAP, cost U.S. companies four times as much as direct medical costs.
- The EAP's fundamental knowledge of the workplace and workplace concerns is greater than any other benefit.
- Today, about three-fourths of 'high performing' companies measure employee health status as a key part of their overall risk management strategy<sup>1</sup>, and even more have an active wellness initiative.
- Companies with active EAPs report: lower levels of employee stress, anxiety, dissatisfaction, and turnover; higher levels of fair compensation; more meaningful work; and higher levels of engagement from employees.

Halcyon offers clients an integrated behavioral and wellness strategy that provides program participants with a service that is most appropriate for their lifestyle and/or condition and that suits the unique needs, goals and budget of the organization. The end result is happier, more productive employees and an improvement in the overall health and wellbeing of the organization.



## Key Features and Differentiators of Halcyon’s Employee Assistance and Wellness Program

### A “Total Well-Being” Approach

Halcyon recognizes the benefits of an integrated and holistic approach to achieve optimal health. Our program provides participants with the tools, resources, motivation and one-on-one instruction necessary to achieve the perfect balance of physical, financial and mental well-being. Our Triage Clinicians and Health Educators work from the same clinical platform and are cross-trained to identify and refer members with comorbid physical and/or behavioral health concerns into the most appropriate programs.

### Scalable Plan Design Options

The program is designed to grow as the culture, needs and goals of each employer change. An integrated EAP and Core Wellness offering is ideal for organizations that are beginning their wellness journey or for clients that are seeking a scalable solution that can function as the foundation of a larger wellness initiative. As needs change, additional Halcyon services are available to provide a more robust solution, driving engagement through activity-based and outcomes-based incentive programs.

### Proactive Focus

The goal of our promotional calendar is to aggressively promote the services available and drive engagement to improve the health and wellbeing of the members and organization.

### Technology-Enabled Services

Halcyon members can access short term counseling and health coaching using the eConnect® telehealth platform. eConnect® offers scheduled video and web chat coaching to program participants, in addition to the traditional telephonic and on-site components included in the program.





# Halcyon

## EAP

## HALCYON EAP

The EAP is accessible to members 24 hours a day, every day of the year, via a dedicated toll-free telephone number. All calls are answered directly by a licensed and experienced EAP clinician, also known as a ‘Case Manager’. The process for using the EAP can be broken down into **four stages**: clinical assessment, referral and provider education, face-to-face counseling, and follow-up.

### Comprehensive Clinical Assessment

Every call into Halcyon EAP is answered live by one of our licensed and experienced behavioral health Case Managers. Our Case Managers conduct a thorough psychosocial evaluation to determine the caller’s presenting problem, underlying or secondary problem and problem acuity (severity). This typically takes twenty to thirty minutes.

If a member calls with an acute mental health or substance abuse concern that is not appropriate for short-term therapy within the EAP, the Case Manager will work with the member to locate an appropriate resource within the MHP benefit or group health plan.

Halcyon EAP understands the importance of culturally-sensitive programming. To address the needs of non-English speaking members, Halcyon EAP staffs bi-lingual (Spanish-speaking) Case Managers around-the-clock. For languages other than Spanish, we utilize a translation service with capabilities in over 140 languages.

#### Case Manager Qualifications

Halcyon EAP Case Managers have a master or doctorate degree in behavioral health, an average of fifteen years of EAP and behavioral health experience, and an independent license to practice.

### Referral and Provider Education

For conditions that are appropriate for short-term therapy within the Halcyon EAP, the Case Manager will refer the member to a contracted provider. This provider will have the clinical specialty needed to address the member’s condition, and who is located near the member’s home or office. Once the member receives the referral information, the Case Manager contacts the provider to review the referral, and identify additional resources available to the member, such as work-life benefits, a wellness program or other benefit.

### Face-to-Face Counseling

Halcyon EAP provides face-to-face clinical services through an organically-developed network of approximately 18,000 behavioral health clinicians located throughout the country. Each contracted clinician in our network must meet stringent credentialing requirements and maintain high member satisfaction ratings.

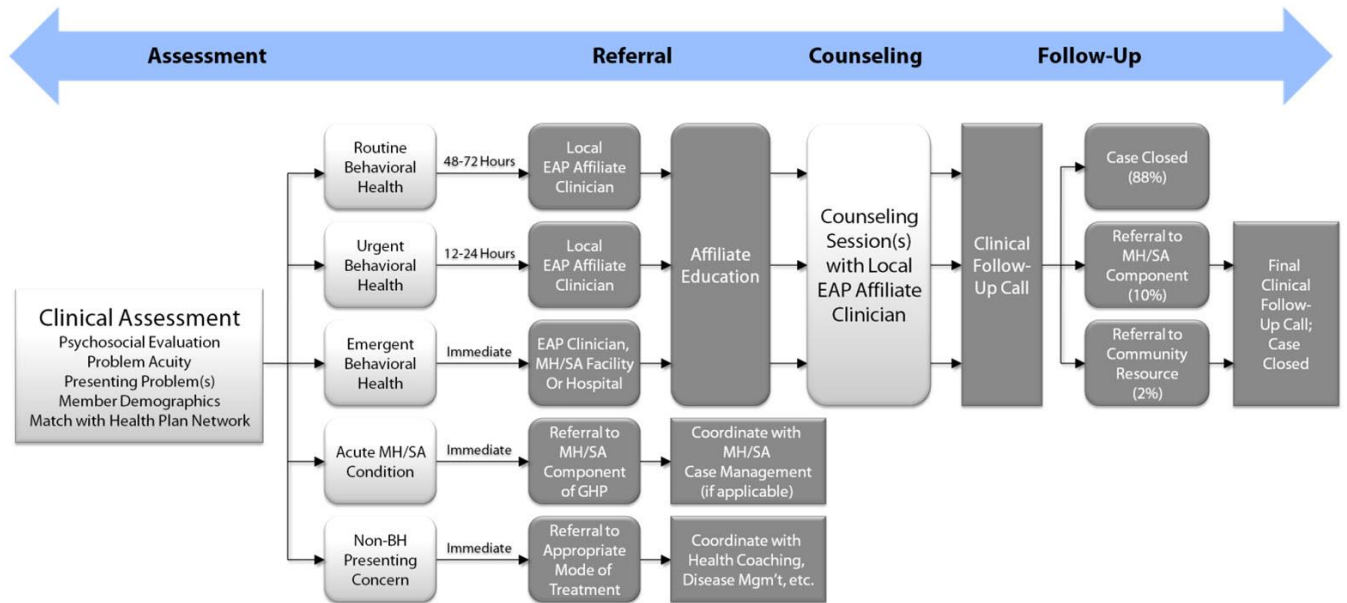
### Clinical Follow-Up

Halcyon EAP practices “true” case management by following up with both the member and the provider after counseling sessions. Although this follow-up usually leads to case closure and resolution, sometimes a referral to the medical plan or a community-based resource may be in order. Under the latter two circumstances, the EAP Case Manager follows up with the member a second time to ensure they received the proper guidance from the post-EAP referral.

#### Case Resolution

Approximately 88% of all cases are resolved within the framework of the EAP.

## EAP Care Path



## EAP WORK-LIFE BENEFITS

The work-life benefits available through Halcyon EAP enable employees and their family members to deal with life's daily challenges. For each of the following work-life components, Halcyon EAP provides a comprehensive library of supporting educational materials, which are available in both English and Spanish. These materials can be provided to members in hardcopy form or electronically, on the Halcyon EAP website.

### Advantages of Halcyon EAP's Work-Life Benefits

12-Hour Turnaround for Routine Cases (*Industry Standard is 48 Hours*)

6-Hour Turnaround for Urgent Cases

## Legal Assist with Integrated ID Recovery

Halcyon EAP Legal Assist provides client companies with a cost-effective way to help employees who have legal concerns. The following components are included in the Legal Assist program:

- **Unlimited Access:** Members can access the service an unlimited number of times for unique issues.
- **Free Telephonic Advice:** Provides members with unlimited, immediate, free telephonic legal advice with an experienced private practice attorney from the caller's home state.
- **Free In-Person Consultation:** Members have access to a free 30-minute consultation with one of over 20,000 attorneys across the country.
- **ID Recovery:** Provides members with telephonic access to an identity recovery professional who will help them assess their situation and create an immediate action plan.

## Financial Assist

Halcyon EAP Financial Assist provides employees and their family members with access to top rated financial professionals when needs arise. That way, they can concentrate on their job, not their financial concerns. Halcyon EAP financial counselors and educators are available for telephonic consultation Monday through Saturday. The following services are included in the program:

- **Financial Information Line:** Financial counselors can address questions regarding financial management, including debt reduction, home buying, budgeting, foreclosure prevention and bankruptcy prevention. In addition, Certified Financial Planners are available to answer questions about financial planning and long-term goal-setting.
- **Debt Management Plans:** Members can learn how to work with creditors to build repayment plans for unsecured debt.
- **Bankruptcy Prevention:** Specialists ensure that members understand the ramifications of bankruptcy filing and help them determine which other options are more appropriate.
- **Credit Report Review:** Credit reports and scores are provided to the employee for \$10 per report.
- **Housing Education:** Financial Assist counselors help members in preparing for a home purchase, or options around keeping their home in times of financial distress.

## Family Assist: Resource & Referral Services

Halcyon EAP offers an industry-leading array of resource and referral services that provide client members with the support and guidance they need to stay on the job and productive. Halcyon EAP Family Assist services utilize a team of experts who offer information and referrals (within 12 business hours) in areas such as:

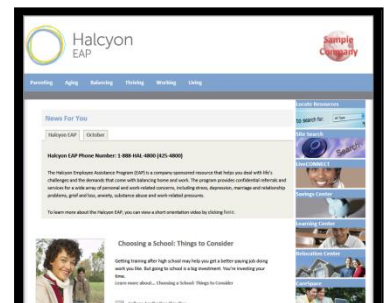
- Child care
- Adoption
- Elder care
- Education
- Pet care
- Automotive repair
- Home maintenance
- Personal convenience services

## WEB-BASED SERVICES

Our website acts as an excellent complement to the program’s telephonic and in-person services; and can be customized with the client’s logo and links to the organization’s other benefits providers, intranet, and events. The site contains an array of information, articles, resource search engines, audio and video files, “how-to” guides, and online seminars.

**Web-Based Services Members:** The content of the site is divided into these core areas:

- **Parenting:** topics related to child care and parenting
- **Aging:** topics related to older adults and elder caregiving
- **Balancing:** topics related to family, relationships, and personal growth
- **Thriving:** topics related to healthful living for all ages
- **Working:** topics related to career development and workplace issues
- **Living:** topics related to everyday life and convenience



In addition, the following features can be found within the aforementioned core areas:

- **Free Monthly Topical Webinars**
- **‘Self-Search’ Locators** – Resources for local child care providers, elder care services, adoption, education, pet sitting, private and public colleges, volunteer opportunities, and attorneys.
- **‘eLearning Skill Builders’** – These 20-minute online training modules give the user proficiency in a variety subjects,
- **University Search** – Search for the ‘Right’ college, scholarships, etc.
- **Health & Wellness** – Everything from WebMD to tip sheets to personal assessment tests
- **‘Ready Docs’** – Fill-in-the-Blank forms to assist participants with activities, such as: writing a will; buying or selling a house or car, family finances, bills of sale, general releases, etc.

**Web-Based Services for Supervisors and Human Resource Personnel:** In addition to providing an industry leading EAP and work-life website to client employees, Halcyon EAP also provides a wide array of web-based resources to supervisors and human resource personnel including:

- **Supervisor Tool Kit** – This site contains Halcyon EAP’s Handbook for Supervisors, copies of bilingual wallet cards, EAP newsletters, monthly/quarterly promotional posters, brochures and FAQ’s, over 100 topic-specific tip sheets and the Supervisor Training Module.
- **Supervisor Training Module** – This 15-minute training course teaches supervisors about the EAP program. It also contains a post-module proficiency quiz, which can be reported to client’s who want to mandate that their supervisors complete the course.

## PROGRAM FEATURES

The Halcyon EAP provides a number of features that address issues on an organizational level including:

- **Management Consultations:** provide expert guidance and support for managing difficult workplace situations and providing assistance to employees in need. These confidential one-on-one discussions with client supervisors can address work performance, attendance issues, workplace violence, substance abuse, mental illness and many other employee-related topics. Halcyon EAP will provide an objective and professional assessment with experience-based recommendations for change.
- **Critical Incident Stress Management (CISM):** services are offered to Halcyon EAP's clients following incidents such as workplace violence, robbery, a natural disaster, suicide or a workplace accident which can leave employees shocked, distracted and unable to perform their job effectively. When these instances occur, employees who participate in worksite debriefings recover and return to work more rapidly than those who do not. The debriefings provide affected employees with:
  - a safe environment to normalize their emotional responses to the event,
  - hastens an organizational return to productivity,
  - enhances the employees' overall adjustment at work and at home.

Our fast response and thorough follow-up ensures that debriefings are effective in reducing worksite disruption and meeting each organization's needs. Halcyon EAP also works with a nationwide team of experts to advise and debrief on critical incidents of all types.

- **Drug-Free Workplace Consultation:** give employers guidance on how to develop comprehensive programs from experienced and licensed behavioral health professionals who understand the Department of Labor's definition of a drug-free workplace. Effective workplace policies can reduce worker's compensation claims, high insurance claims, turnovers, and identify high risk employees through early intervention before they become serious liabilities to the company.
- **Quality Assurance:** Halcyon Behavioral Inc. is committed to the highest quality of professional service and ethical standards in its delivery of Employee Assistance Programs and Managed Behavioral Healthcare services. Consistent with this philosophy, we have established a structured set of Quality Assurance (QA) metrics, which guide the delivery of the benefit and include quantitative measurement and analysis of a variety of clinical care and service components.

## ADDITIONAL CORPORATE TRAINING SERVICE OPTIONS

To enhance a client's organizational development strategy, we can provide customized workshops and training modules designed to make a client's staff and supervisors more effective. These modules are divided into two broad categories:

- **Topical Training:** Halcyon EAP's topical training modules allow clients to use HBI as their own private organizational development resource. All modules are 50 minutes in length and will be customized to meet the client's training objectives.
- **Benefit Training:** Through benefit training, Halcyon EAP will provide a client's staff and supervisors with the tools and knowledge to utilize the EAP program most effectively.

### Most Popular Topical Training Modules

Drug-Free Workplace  
Stress Management  
Conflict Resolution  
Workplace Diversity  
Team Building  
Time Management

*Plus 20 Additional Topics*

All sessions include interactive exercises, audience participation and post-session proficiency testing. These modules can be delivered in-person, via webcast or through the web-based EAP Training System platform.

## PROGRAM PROMOTION

Halcyon EAP provides clients with a variety of organically-developed communication materials aimed at driving awareness of the EAP program throughout the organization. We will develop a culturally-sensitive promotional plan that is tailored to the unique needs of the company. The following is a sample list of promotional vehicles that have proven to be successful at increasing the visibility of this benefit:

- Introductory Letters
- EAP Brochures
- Wallet Cards
- Supervisor and Employee Newsletters
- Worksite Posters
- Web/Email Blasts
- Customizable EAP and Work-Life Website

Once the program is underway, a variety of posters, quarterly employee and supervisor newsletters, eBlasts and ad hoc promotions are provided to EAP clients. Halcyon EAP also welcomes any opportunity to promote utilization through our attendance at events including health fairs, wellness seminars or any organizational events that the client determines to be a promotional opportunity.





Halcyon  
Health & Wellness



## HALCYON WELLNESS: CORE PLAN

The Halcyon Health and Wellness Core plan is a turnkey solution that can function as the foundation of an impactful wellness program, or serve as a scalable entry-point into a multi-year wellness initiative. The model is ideal for organizations that are beginning their wellness journey or for clients that are seeking a scalable solution that can function as the foundation of a larger wellness initiative.

The Core plan design option includes four key components:

- Unlimited Health Coaching
- Customizable Wellness Portal
- Team/Individual Competition Platform
- Year-Round Health Promotion

### Unlimited Health Coaching

Health coaching through Halcyon Health & Wellness is based on a holistic, mind-body approach that views good health as a balance of physical, financial and mental well-being. Halcyon provides wellness program participants with the tools, resources, motivation and one-on-one instruction necessary to achieve their health and wellness goals.

### **Total Health Approach**

Halcyon Health & Wellness' holistic approach to coaching combines resources from multiple disciplines to address a wide array of health and well-being concerns. Participants have access to master-degree health educators, licensed behavioral health clinicians and financial advisors through one integrated platform.

### **Delivery**

Halcyon Health & Wellness provides personalized coaching through multiple channels: telephonic; in-person; email; web chat; text and video. For web chat and video consultation, Halcyon offers scheduled sessions via the proprietary eConnect® platform. Coaching is available in both English and Spanish.

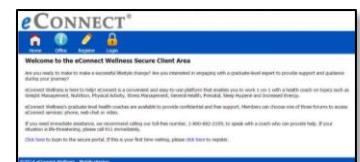
### **Industry Leading Health Coaching**

Our health educators have a master's degree in a health-related field, an average of ten years' experience, and are certified by both the Wellness Council of America (as a Certified Health Coach) and the American Lung Association (as a Tobacco Cessation Facilitator).

### **Coaching Process**

Using the principles of stage-based behavior change, motivational interviewing and Positive Psychology, the Halcyon Health & Wellness coaching model meets participants where they are in their readiness to change. The Halcyon Health & Wellness coaching process includes:

- Using a member-centric problem-solving approach that identifies a participant's readiness to change;
- Helping participants maintain active engagement in the coaching process;
- Developing a personalized plan of action;
- Tracking goal achievement and success;
- Creating SMART (specific, measurable, attainable, relevant and time specific) goals and activities;
- Providing timely and relevant health information and education;
- Using Positive Psychology principles to uncover members' strengths and motivations;
- Coordinating referrals to other health management resources, when appropriate.



## Coaching Background

All Halcyon Health & Wellness educators have a graduate-level degree in a health-related field and are certified by both the Wellness Council of America (as a Certified Health Coach) and the American Lung Association (as a Tobacco Cessation Facilitator). In addition, all health educators also have education and professional experience in one of more of the following areas:

- Health Promotion
- Certified Personal Training
- Nutrition
- Community Health
- Public Health
- Tobacco Cessation
- Wellness Consulting
- Exercise Physiology
- Prenatal Counseling
- Public Health Policy

## Coaching Programs

<b>UFIT</b> ADVANCED PHYSICAL ACTIVITY	<b>UBREATHE</b> TOBACCO CESSATION
<b>UFUEL</b> PERSONALIZED NUTRITION	<b>UBODY</b> WEIGHT MANAGEMENT
<b>UREST</b> SLEEP HYGIENE	<b>UMOVE</b> BEGINNING PHYSICAL ACTIVITY
<b>UPLUSONE</b> PRENATAL WELLNESS	<b>UBEAT</b> HEART HEALTH
<b>UCENTS</b> FINANCIAL FITNESS	<b>U&amp;YOURS</b> FAMILY HEALTH
<b>UBALANCE</b> STRESS MANAGEMENT	

Participants may work with a Halcyon Health & Wellness health educator on one or more of the programs from the 'U' suite (above). Additional coaching programs are available for clinical education including blood pressure management, cholesterol management and diabetes education.

## Halcyon Health & Wellness Coaching Results

81% of coaching participants met their personal health goal

- 98% of participants who met their personal health goal are confident they can maintain healthy habits on their own.
- 99% of coaching participants are satisfied with their coaching experience
- 65% of UBreathe participants quit tobacco use; 35% remain quit after 12 months.

## Client Services and Health Promotion

Halcyon's team of consultants and client services professionals serve as an extension of the City of Madera human resources or benefits team, providing wellness-related promotion and communication with the goal of driving maximum awareness to the wellness program. City of Madera will have a dedicated wellness consultant, who will serve as the single point of contact from Halcyon Health & Wellness.

Halcyon will create customized and client-branded promotional materials during implementation and then on an ongoing basis throughout the year. Introductory resources include home mailers, letters/flyers, worksite posters, orientation videos, wallet cards, electronic campaigns and payroll stuffers. On a monthly basis, a client-branded

wellness newsletter is available on the 1<sup>st</sup> day of each month for all members, supported by a 30-minute topical webinar and poster/flyer. The newsletter, webinar and flyer follow the same wellness theme each month.

**Sample Annual Wellness Calendar for City of Madera**

	MONTHLY THEME	NEWSLETTER AND WEBINAR	CHALLENGE (SAMPLE)
ROLLOUT	Intro Letters, Posters, Flyers, Brochures, eBlasts		
JAN	S.M.A.R.T. Goal Setting	Meet the Health Coach	
FEB	Heart Smart	Diversity in Health Risks	
MAR	Nutrition 101	Meal Planning: Get Comfortable in the Kitchen	March Madness Activity Challenge
APR	Financial Fitness	Making Sense of your Cents	
MAY	Spring into Action	Positive Psychology: Train Yourself Happy	
JUN	Breathe Easy	Improve Your Environment, Improve Your Breathing	
JUL	Prime Time	Time Management for Healthy Lifestyles	Fruit & Veggie Challenge
AUG	Self Love	Prioritizing Your Health & Wellbeing	
SEP	Back to Basics	Stress Management	
OCT	The Art of Relaxation	Counting Sheep: Improve Your Sleep Habits	
NOV	Mindfulness	Emotional Eating	Maintain, Don't Gain Challenge
DEC	You Are Enough	Optimism During the Holidays	



ROLLOUT

QUARTERLY

MONTHLY

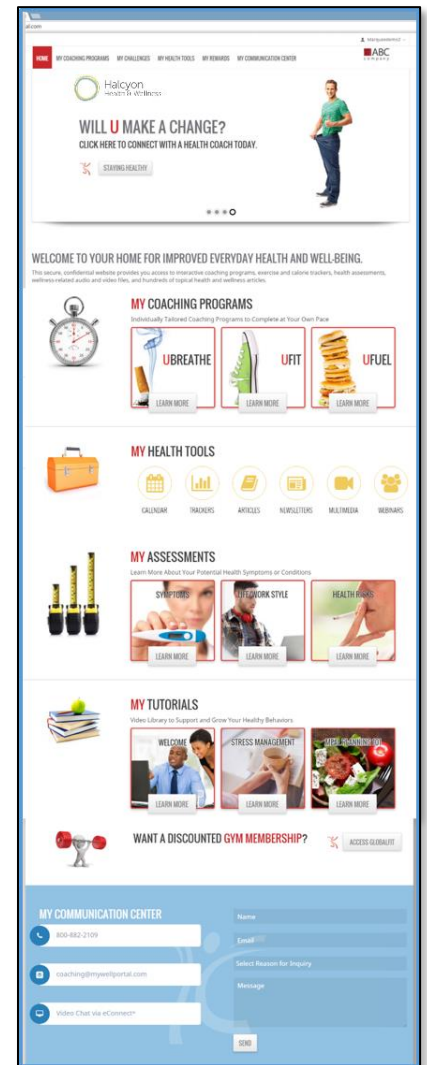
## Customizable Wellness Portal

The program's website, which allows for client-level customization and branding, offers a variety of health and wellness resources that keep participants engaged with the program year-round. For many clients, the platform functions as the hub for all health and well-being programs by allowing for connectivity to portals and services offered by the client's other health management benefits.

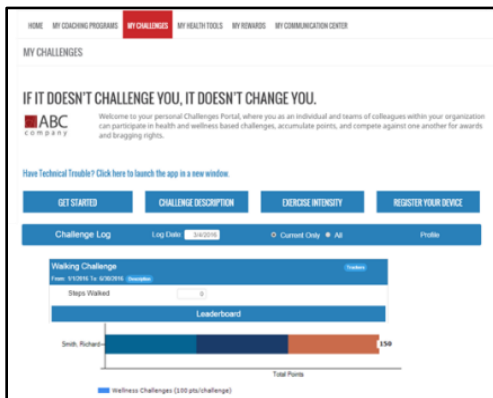
Participants in any risk category can access the following easy-to-use resources to stay on-track and form life-long healthy habits.

- **My Coaching Programs:** Through interactive and structured training programs like UBreathe for tobacco cessation and UFuel for nutrition, participants can complete a six to eight-week module that helps them get healthier from the privacy of their own home. Participation can be tracked and utilized for reporting or incentive purposes.
- **My Health Tools:** This section provides users with access to health-focused eLearning modules, wellness tip sheets, food and exercise logs, interactive videos, recipes, health encyclopedias, and more.
- **My Assessments:** The My Assessments section includes hundreds of health assessments to help participants determine their level of risk and identify key warning signs.
- **My Tutorials:** The My Tutorials section includes short videos on a variety of health topics. Each video includes a short proficiency quiz at the end and is trackable at the individual level for reporting or incentive purposes.
- **Discounted Gym Memberships:** Members have access to discounted membership fees at thousands of participating gyms across the country.
- **My Communications Center:** Participants use this section to connect with a Halcyon Health educator telephonically, via email, or through the program's proprietary eConnect® portal for video or web chat coaching.

Additional sections within the portal can be added based upon features elected by each client, including My Biometrics, My Challenges and My Rewards.



## Competition Platform



- Walk This Way (Walking/Steps)

Through the Halcyon Health & Wellness competition platform, members may participate in team or individual challenges designed to engage participants and promote the benefits of healthy living. Clients are able to select from ten team or individual competition templates, including:

- Find Your 30 (Physical Activity)
- Drop 5 (Weight Loss)
- Counting Sheep (Sleep)
- Maintain, Don't Gain (Weight Management)
- Food Swap (Nutrition)

Each competition or challenge includes a promotional toolkit to ease the administration, marketing and access to the competition portal. All activities are tracked online and include a contest leaderboard along with admin tools for reporting and incentive fulfillment. Custom challenges are also available upon client request.

For applicable challenges, the platform integrates with a number of personal tracking devices included Fitbit, Gamin, Apple Health, Google Fit and Fuelband.

## Additional Core Features

- Discounted Gym Memberships for Program Participants
- Trend and Utilization Reporting
- Connectivity with Other Health Management Components
- Scheduled Video and Web Chat Consultation via eConnect® Platform

# HALCYON EMPLOYEE ASSISTANCE AND WELLNESS PROGRAM: PRICING AND PROGRAM SUMMARY

Client: City of Madera

## Program Components:

<p><b>Short-Term Counseling Model</b></p> <ul style="list-style-type: none"> <li>Comprehensive Psychosocial Assessment to Determine Presenting Concern and Problem Acuity</li> <li>Referral to Nationwide Network of Behavioral Health Specialists for Face-to-Face Counseling</li> <li>Outcome-Driven Focus on Problem Resolution</li> </ul> <p><u>Access</u></p> <ul style="list-style-type: none"> <li>"Around the Clock" Access to EAP</li> <li>100% Clinical-First EAP Model</li> <li>Over 18,000 EAP-specific Contracted Clinicians</li> <li>Bi-Lingual EAP &amp; Work-Life Counselors</li> </ul> <p><u>Account Services</u></p> <ul style="list-style-type: none"> <li>Dedicated Account Manager</li> <li>Quarterly Utilization Reporting and Review</li> </ul> <p><u>Case Management</u></p> <ul style="list-style-type: none"> <li>Clinical Communication Throughout Case</li> <li>Post-Case Follow-Up with Member</li> <li>Coordination with Health Plan MHSA Services</li> </ul> <p><u>Management Services</u></p> <ul style="list-style-type: none"> <li>Unlimited Management Consultation and Referrals</li> </ul> <p><u>Program Promotion</u></p> <ul style="list-style-type: none"> <li>Robust Promotional Schedule</li> <li>Individual Brochures, Wallet Cards, Worksite Posters, Newsletters and Flyers</li> </ul>				
<p><b>Work-Life Benefits</b></p> <p><u>Family Assist</u></p> <ul style="list-style-type: none"> <li>Professional Referrals to Local Providers, Specialists and Resources <i>Child Care, Elder Care, Relocation, Pet Care, Automotive, Education, Travel, Home Improvement, Volunteering</i></li> <li>Twelve (12) Hour Turnaround for all Referrals</li> <li>Six (6) Hour Turnaround for Urgent Referrals</li> <li>Educational Materials and Robust Fulfillment Package for all Participants</li> </ul> <p><u>Legal Assist with Integrated ID Recovery</u></p> <ul style="list-style-type: none"> <li>Free Telephonic or Face-to-Face Legal Advice and Consultation</li> <li>Integrated ID Recovery Program</li> <li>25% discount additional legal services</li> </ul> <p><u>Financial Assist</u></p> <ul style="list-style-type: none"> <li>Free Consultation with a Financial Specialist for Support with Consumer Finance Issues <i>Debt Consolidation, College Planning, Budgeting, Long-Term Goal Setting, Estate Planning</i></li> <li>Discounted flat rate per hour for additional financial services</li> </ul>	<p><b>\$1.92 PEPM</b></p>	<p><b>\$3.42 PEPM for Three Sessions per Six months</b></p> <p><b>EAP + Wellness Program</b></p>		
<p><b>Tailored EAP and Work-Life Website</b></p> <ul style="list-style-type: none"> <li>EAP Website Customized with Client's Logo and Company-Specific Information Tab</li> <li>Free Monthly Topical Work-Life Webinars, Coordinated with Program Promotional Flyers</li> <li>eLearning "SkillBuilder" Training Modules to Develop Proficiency on a Variety of Topics</li> <li>Supervisor 'Tool Kit' for Client Managers and Supervisors</li> <li>Hundreds of Search Engines and Calculators, Thousands of Articles and Audio "How to" Lessons</li> </ul>				
<p><b>Critical Incident Response Services</b></p> <ul style="list-style-type: none"> <li>Level I (Telephonic Consultation; Post-Incident Referrals to EAP)</li> <li>Level II and III, Which Require an On-Site Response</li> </ul>				
<p><b>Core Wellness Product</b></p> <ul style="list-style-type: none"> <li>Unlimited Telephonic and Web-Based Coaching</li> <li>Client-Specific Health and Wellness Website</li> <li>eConnect® Video and Web Chat Wellness Consultation</li> <li>Wellness Program Monthly Promotional Campaign</li> </ul> <ul style="list-style-type: none"> <li>-Integration with Other Benefits</li> <li>-Team or Individual Competition Portal</li> <li>-Program Utilization Reporting</li> <li>-Discounts to Over 4,000 Gyms</li> </ul>	<p><b>\$1.50 per Employee per Month (PEPM)</b></p>			
<ul style="list-style-type: none"> <li>Corporate Training – Customizable Topical Training</li> </ul>	<p><b>\$175.00/hour</b> (as needed)</p>			

## **HALCYON EMPLOYEE ASSISTANCE AND WELLNESS PROGRAM: CONTACT INFORMATION**

Our senior management is available at your convenience to answer any questions or discuss the complementary health benefit in more detail.

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# EMOTIONAL FITNESS COACHING (“TEXT THERAPY”)



56%

Over Half of American Adults with a Mental Illness Do Not Receive Treatment (Mental Health America)

## HOW IT WORKS

Emotional Fitness Coaching is a convenient and stigma-free access point that allows EAP participants to conveniently connect with a licensed counselor, also known as a 'Coach'.

After completing a short questionnaire, new users can begin communicating with their Coach immediately. Coaching is not intended to replace face-to-face or telebehavioral counseling through the EAP, though – and users with acute concerns will be guided to other resources within the program.

Halcyon's proprietary Coaching platform provides participants with convenient access to licensed counselors. Through Halcyon's secure platform, these counselors (also known as 'Coaches') help users boost emotional fitness and wellbeing through a personalized exchange of text messages, voicenotes, tip sheets, videos and other resources.



### ACCESSIBLE

Participants can text with their Coach at any time – on mobile or desktop – without worrying about scheduling or other conflicts.



### LICENSED

All Coaches are independently-licensed clinicians who also have a special accreditation for providing technology-based care.



### SECURE

All communication between participants and Coaches is encrypted and stored securely.



### NO STIGMA

Coaching is an excellent resource for those who may not be receptive to 'traditional' face-to-face or distance counseling through the EAP.