

# Opportunities in Tomorrow's Workplace: Assisting the Organizational Client

February 9-12, 2004

Las Vegas, Nevada

*Participate in a stimulating series of courses designed to help you invigorate your EAP and position your programs for success. Choose from nine courses over four days. Mix and match to meet your own needs.*

## TRAINING INSTITUTE SCHEDULE

FEBRUARY 2004		9	10	11	12
	Fundamentals of Employee Assistance Programs <i>(2 day course)</i>	2 day course			
	Substance Abuse Professionals Qualification Training <i>(2 day course)</i>	2 day course			
<b>NEW</b>	Insights Workstyle Assessments: Individual and Team Development	•			
	Business Coaching: Leveraging Employee Assistance Skills		•		
<b>NEW</b>	Transforming the Workplace: Building Your Work/Life Capacity <i>(2 day course)</i>			2 day course	
	Working with the DOT Employer			•	
<b>NEW</b>	New Business Development: Opportunity, Growth and Strategy			•	
	EAP Management Consultation				•
<b>NEW</b>	Account Retention: Focusing on the Organization				•

# FUNDAMENTALS OF EMPLOYEE ASSISTANCE PROGRAMS

February 9-10 • Instructor: Cynthia Sulaski, MSW, CEAP • 14 PDHs

## Purpose of the Course

EAP work requires knowledge ranging from substance abuse and behavioral health to work organizations and human resources management. This widely acclaimed, highly interactive two-day course is an excellent overview for those preparing for EACC certification or wanting an opportunity to learn the newest developments in EAP design and delivery.

## Course Objectives

- ✓ Understand the various EAP models of service delivery
- ✓ Learn how work organizations function
- ✓ Appreciate the role of EAPs as neutral problem solver to multiple clients
- ✓ Review key human resources policies and procedures relevant to EAPs
- ✓ Understand the consultative role with managers
- ✓ Design effective methods of promoting EAP services
- ✓ Differentiate an EAP assessment from a clinical intake
- ✓ Apply short-term counseling models effectively
- ✓ Identify current and future trends impacting EAPs

# SUBSTANCE ABUSE PROFESSIONALS QUALIFICATION TRAINING

February 9-10 • Instructor: Lee Mauk, M.Ed., CEAP • 14 PDHs

## Purpose of the Course

Employers in the transportation industry must adhere to federal regulations concerning use and testing for alcohol and controlled substances. The regulations establish assessment, monitoring and reporting procedures for the Substance Abuse Professional (SAP). Under the new DOT regulations, current SAPs must document participation in a formal SAP training. SAPs who complete the Qualification Training must document participation in 12 hours of SAP-related training every 3 years. Learn to provide SAP services in compliance with the new rules.

## Course Objectives

- ✓ Review Department of Transportation rules (DOT) (background, rationale, and coverage)
- ✓ Understand the rules for the six Operating Administrations
- ✓ Learn the key DOT drug and alcohol testing requirements
- ✓ Understand SAP qualifications and prohibitions and legal and liability issues
- ✓ Identify required elements of a SAP's initial evaluation and assessment
- ✓ Review elements of determining assistance and making recommendations
- ✓ Assess process of conducting follow-up evaluation and creating follow-up testing plan
- ✓ Understand reporting and recordkeeping requirements
- ✓ Understand how to consult and communicate with employers, MROs, and treatment providers
- ✓ Develop marketing strategies and business opportunities

# INSIGHTS WORKSTYLE ASSESSMENTS: Individual and Team Development

NEW

February 9 • Instructor: Andy LaFave, LMSW-ACP, CEAP • 7 PDHs

## Purpose of the Course

Are you looking for ways to add new value to your client organizations? Insights Discovery is a system of workstyle assessment and training tools that can support you in creating greater workplace productivity. The Insights Discovery profile is a personalized 20+ page document generated upon completion of an on-line evaluator. It provides an in-depth understanding of an individual's workstyle, key strengths and weaknesses, value to the team, and communication styles. Use this with coaching, team-building, and organizational interventions.

Note: Participants in this course will receive a free insights assessment and profile to be completed prior to the course.

## Course Objectives

- ✓ Consider possible uses of workstyle assessments in an EAP context
- ✓ Understand the Insights Color System and its base in psychological theory
- ✓ Review participants own Insights Discovery reports
- ✓ Understand how perception and preference affect individual response to stress
- ✓ Learn how to use workstyle awareness to enhance individual and team performance
- ✓ Discuss ways to improve team functioning with these tools
- ✓ Identify how the Insights report can be used with individuals, e.g. coaching
- ✓ Examine other Insights tools including on-line coaching and e-learning
- ✓ Discuss strategies for using Insights to enhance EAP visibility within organizations
- ✓ Consider how external EAPs might use Insights with consulting strategies to augment revenue

# BUSINESS COACHING: Leveraging Employee Assistance Skills

February 10 • Instructor: Andy LaFave, LMSW-ACP, CEAP • 7 PDHs

## Purpose of the Course

Coaching can be a powerful tool for both internal and external EAPs to differentiate services and present unique value to client organizations. Attendance at this training will enable you to accelerate the learning process for building coaching skills and creating a coaching product in your EAP. For external programs, offering a credible coaching product will create a strong distinction between your services and the competition's. For internal programs, providing coaching will enhance program relevance and utilization and create stronger ties with HR and organizational development colleagues. This course will take you through a step-by-step process of developing a professional coaching product for your EAP practice.

## Course Objectives

- ✓ Understand the history of business coaching and EAP coaching services
- ✓ Build a coaching process that is professionally sound, replicable and in high demand
- ✓ Identify the differences between EAP management consultation and coaching
- ✓ Align your coaching product with the coaching efforts of your client organizations
- ✓ Integrate coaching with existing EAP services
- ✓ Identify and train EAP staff who are best suited for expanding into the coaching role
- ✓ Market new coaching services for maximum leverage with individual and organizational clients

# TRANSFORMING THE WORKPLACE: Building Your Work/Life Capacity

NEW

February 11-12 • Instructor: Mary Ellen Gornick, MA • 7 PDHs

## Purpose of the Course

Today's workplaces face the reality that employees are the key to success. Keeping those employees engaged in their work and committed to their employers is a constant challenge. Research shows that employees view WorkLife balance as a major factor in their job satisfaction. Far more than childcare and eldercare, today's WorkLife initiatives are comprehensive and wide-ranging. Learn how your organization can contribute services and consultation to help employers transform their workplaces. Expand the focus of your Work/Life consultation from the individual to the entire organization.

## Course Objectives

- ✓ Understand the role and function of WorkLife within organizations
- ✓ Identify the scope of programs, policies and practices that fall under the WorkLife umbrella
- ✓ Appreciate the research that demonstrates the "business case" for WorkLife
- ✓ Understand the application of various best practice models
- ✓ Identify current and future industry trends that offer opportunity for EAP and WorkLife initiatives
- ✓ Assess your capacity to provide broad WorkLife programs
- ✓ Understand the consultative role of WorkLife
- ✓ Identify increased business opportunities for WorkLife involvement
- ✓ Create a plan to expand involvement in WorkLife
- ✓ Review options for fine-tuning operations for EAP and WorkLife integration
- ✓ Learn how to build relationships with strategic service partners

# WORKING WITH THE DOT EMPLOYER

February 11 • Instructor: Lee Mauk, M.Ed., CEAP • 7 PDHs

## Purpose of the Course

DOT employers often turn to their EAPs for SAP services, training for supervisors, and general consultation on compliance with regulations. DOT's rules require that supervisors of DOT-covered employees receive specific training in reasonable suspicion, observation and documentation. This requirement creates a unique opportunity for EAPs and for free-lance trainers. This course will provide critical information to ensure that your training accurately presents content that DOT requires. This course will also examine the employer's responsibilities under these rules and a detailed explanation of the actual rules.

## Course Objectives

- ✓ Understand DOT drug and alcohol testing rules, especially definitions
- ✓ Assist an employer with compliance issues, procedures and general consultation
- ✓ Design a training to include an employer's policy and rules
- ✓ Provide employers with customized record keeping forms to document compliance
- ✓ Understand reasonable suspicion under DOT rules, including documentation
- ✓ Identify the essential components of training for DOT supervisors
- ✓ Understand an employer's testing program under independent authority
- ✓ Develop a plan to market your training and on going consultation to DOT employers

**NOTE:** Because 88% of the DOT workforce falls under federal highway regulations (FMCSA), this training will focus on the FMCSA regulations. The specific agency rules for FRA, FTA, FAA, USCG, and RSPA will not be covered in the training. Also, it is assumed that participants have had prior training experience in signs and symptoms of drug and alcohol use in the workplace.

# NEW BUSINESS DEVELOPMENT: Opportunity, Growth and Strategy

NEW

February 11 • Instructor: Brenda R. Blair, MBA, CEAP • 7 PDHs

## Purpose of the Course

Is your EAP up-to-date, nimble, and responsive to the ever-changing work environment? Are your Work/Life services anticipating the future needs of employees and employers? Or have you perhaps become stuck in an old way of perceiving your opportunities? New opportunities await EAP and Work/Life programs that identify trends, clarify workplace needs, and design services to meet those needs in creative and effective ways. Then successful pricing, marketing, and sales can focus on “telling the story” about these new services to help generate new business for externals and additional support for internals. Take this course to position yourself for future growth and success.

## Course Objectives

- ✓ Identify future workplace issues that create opportunities for EAP and Work/Life
- ✓ Understand specific issues regarding human capital management, risk management, resilience, and work environment that affect EAP and Work/Life
- ✓ Focus on creative thinking about needs, responses, solutions
- ✓ Discuss specific opportunities and new service offerings
- ✓ Learn how to plan strategically to respond to these opportunities
- ✓ Review market realities: pricing, profitability, stability, competition

# EAP MANAGEMENT CONSULTATION

February 12 • Instructor: Cynthia Sulaski, MSW, CEAP • 7 PDHs

## Purpose of the Course

As one of the EAP core technology functions, management consultation offers an invaluable service to employers. Given the reduction of Human Resources staff in many organizations and the complexity of human issues in the workplace, the EAP may be one of the few consultative resources that managers and supervisors have available to them. Through case studies, roleplays and group discussion, you will learn how to provide effective consultation to supervisors and managers.

## Course Objectives

- ✓ Understand employer's need for management consultation
- ✓ Recognize the value to an EAP inherent in providing management consultation
- ✓ Understand HR-related regulatory and organizational issues
- ✓ Prepare for a manager's request for consultation
- ✓ Listen to the manager as “customer”
- ✓ Learn to assess requests for consultation
- ✓ Prepare a manager to make an effective referral to the EAP
- ✓ Find a balance between communication and confidentiality limits
- ✓ Determine what additional EAP services can be provided to meet a manager's needs
- ✓ Learn what to include when documenting consultations
- ✓ Track consultations in utilization reports to management

# ACCOUNT RETENTION: Focusing on the Organization

NEW

February 12 • Instructor: Instructor: Brenda R. Blair, MBA, CEAP • 7 PDHs

## Purpose of the Course

Many think it's easier to retain current customers than to gain new ones. Too often accounts are lost because of an insufficient response to the needs of the organizational client. This fast-paced, interactive seminar focuses on specific strategies for account retention and upselling based on knowing and serving the organization as customer. This lively course focuses on real-life skills, typical situations and practical solutions. Participants will leave with ideas that can be immediately applied to their own situations.

## Course Objectives

- ✓ Understand employer needs in today's and tomorrow's workplace
- ✓ Learn how to form key partnerships with HR, unions, safety, legal, benefits, diversity
- ✓ Find out what your customer wants specifically
- ✓ Become a purveyor of solutions, not a seller of products
- ✓ Understand and use data to prepare meaningful reports
- ✓ Learn to make EAP and Work/Life integral to an employer's organization
- ✓ Discuss ways to measure value to the organization, and organizational satisfaction
- ✓ Identify an employer's needs for additional services
- ✓ Use simple tips to increase the probability of contract renewal

## ABOUT THE INSTRUCTORS

**BRENDA R. BLAIR, MBA, CEAP, President** Since 1983, Brenda has provided Fortune 500 employers and others with high quality, customized consultation and training on the design and evaluation of EAPs, managed care, and work/ life programs. She has worked in a multi-state EAP, a treatment center, and an international addictions organization. She was selected for the EAP Hall of Fame and the prestigious EAPA Member of the Year award. She has conducted training in the U.S., U.K., Japan, and South Africa.

**CYNTHIA SULASKI, MSW, CEAP, Senior Consultant** Cynthia has over twenty years experience in both internal and external EAPs providing clinical, operations management, account management, sales and marketing and training design and delivery services. In addition to her involvement with Blair Consulting Group client evaluation, design and delivery consultation projects, Cynthia manages the Institute and other training events.

**LEE MAUK, MA, CEAP, Senior Consultant** As a consultant specializing in the Department of Transportation drug and alcohol testing regulations, Lee develops programs for employers under the DOT mandate, writes policies, and trains supervisors. He has been training SAPs since 1996. Lee entered the EAP field in 1977 when he designed an external EAP which he directed for 15 years. Lee received EAPA's National Recognition Award in 1998.

**ANDY LEFAVE, LMSW-ACP, CEAP Senior Consultant** Andy began his EAP career as an internal EAP at Motorola. He then founded Alliance EAP, serving high tech and similar clients. In the 1980s, he pioneered progressive EAP models that increased utilization and client retention. He introduced EAP coaching services to further integrate Alliances EAP into client company business plans. Since selling his EAP, Andy has worked with EAPs to promote business coaching as an added value service. Andy's current focus is on consulting and training with EA professionals and programs, especially coaching and team development. He is a clinician, business executive, and experienced coach.

**MARY ELLEN GORNICK, MA, President, CPA Group, Inc.** Mary Ellen is a nationally recognized expert in the field of WorkLife. She co-founded CPA in 1984 and continues to provide leadership to CPA's practice areas of WorkLife consultation, community relations, and consultation and referral services. In 1999, Mary Ellen was recognized as one of Chicago's "100 Women Making a Difference". She is a founding board member and past President of the Alliance of Work/Life Professionals (AWLP) and is an Associate Faculty Member for Boston College's Center for Work and Family – Alliance of Work Life Professional Certificate Program.