

SUBJECT	UBC EMPLOYEE AND FAMILY ASSISTANCE PROGRAM
MEETING DATE	DECEMBER 6, 2016

Forwarded to the Board of Governors on the Recommendation of the President

**APPROVED FOR
SUBMISSION**



 Santa J. Ono, President and Vice-Chancellor

DECISION REQUESTED	For Information
Report Date	November 4, 2016
Presented By	Lisa Castle, Vice-President Human Resources Michelle Berner, Director, Human Resources – Total Compensation

EXECUTIVE SUMMARY

At the September 2016 Board meeting, Governors requested additional information about UBC’s Employee and Family Assistance Program. Attachment A provides an overview of the program, and includes responses to the questions.

INSTITUTIONAL STRATEGIC PRIORITIES SUPPORTED

- Learning
 Research
 Innovation
 Engagement
 (Internal / External)
 International

or Operational

UBC's Employee and Family Assistance Program

UBC's Employee and Family Assistance Program (EFAP) is a confidential, voluntary support service that provides UBC's faculty, staff, and eligible family members with short-term clinical counselling and/or work-life consultations to resolve and/or prevent a wide range of personal, work, health, and life issues.

UBC's EFAP Program

The Employee and Family Assistance Program has been in place at UBC since 1993.

The program is cost-shared – 70% is paid by UBC, and 30% is paid by faculty and staff members.

Governance and Day-to-Day Management

The EFAP program is governed by a joint committee that is comprised of representatives of the University and representatives of UBC's unions/associations.

The joint Committee meets three to four times per year to discuss issues such as:

- Plan activity, statistics, services, and client survey outcomes;
- Addressing vendor service issues;
- Determining how to support health promotion efforts;
- Targeting promotion of the program and services;
- Ensuring financial viability of the program; and
- Planning tendering processes as required.

UBC's Human Resources (HR) department actively manages the contract and relationship with the EFAP provider, which is currently Shepell. This includes dealing with issues related to the services provided and application of provisions of the contract.

In the event that a faculty or staff member has service concerns with the EFAP provider, they can address them through HR, a member of the joint EFAP Committee, or directly with the EFAP provider (i.e., Shepell). All complaints go through Shepell's quality assurance review process.

Shepell has a confidential Quality Assurance Review Process (QAR) in place to ensure customer satisfaction and ongoing system improvements. The QAR investigates complaints, and determines recommendations for resolution with oversight from the Senior Vice President, Operations.

Nature of EFAP Program Offerings

Shepell provides the following core services under UBC's current contract:

- **Counselling services** are conducted in-person, or by phone, video, web, or mobile app. In-person appointments are scheduled within 3-5 days. Counselling is short-term, and issue-focused in nature. Long-standing and chronic issues that require long-term support are referred by Shepell to an external community resource. Shepell's phone line is open 24/7. In the event of an emergency, a Crisis Counsellor is immediately available by telephone. If Crisis Counselling is requested in-person, then appointments are booked within 24 hours.
- **Work-life consultations** are conducted over the telephone.
- **Lunch and learns** on a variety of health and wellbeing topics are provided, and Shepell provides UBC up to 20 sessions per year at no charge as part of the current contract.

The following table provides a sampling of the type of issues that EFAP counselling can assist with.

Counselling	Work-Life Consultations
<ul style="list-style-type: none"> ▪ Personal/emotional ▪ Couple/relationship ▪ Family ▪ Work-related ▪ Addiction-related 	<ul style="list-style-type: none"> ▪ Family support ▪ Financial support ▪ Legal support ▪ Nutrition support ▪ Health coaching ▪ Naturopathic services

Shepell also provides the services described below.

- **Trauma assistance** debriefings may be arranged for departments and faculties in response to a traumatic event such as the death of an employee. Shepell charges for these on a fee-for-service basis. Ten debriefings were conducted at UBC between April 1, 2015 and March 31, 2016.
- **Management consultations** are provided to help support and guide managers dealing with employee issues. This support is in addition to what is offered by UBC Human Resources, and is included at no charge as part of UBC's contract with Shepell. Two consultations were provided between April 1, 2015 and March 31, 2016.
- **Education and training sessions** on a wide variety of health and wellbeing topics are provided, and these are tailored to employees or managers/people leaders, on a fee-for-service basis.

Type of Issues for which UBC Faculty/Staff/Dependents Obtain EFAP Services

The 2015 EFAP utilization rate increased to 16.2% (from 12.6% in 2014), with the following most common presenting issues:

a) Counselling Services (total of 1,667 cases)

1. Marital/Relationship (26%)
2. Stress/Anxiety (23%)
3. Work-related (13%)
4. Family-related (12%)
5. Psychological/Personal/Emotional (10%)
6. Depression (6%)
7. Life Transitions/Grief/Bereavement (6%)

b) Preventive Services (total of 431 cases)

1. Legal Advisory (32%)
2. Health and Wellbeing (28%)
3. Financial Advisory (23%)
4. Childcare and Parenting (8%)

As of October 31, 2016, UBC's EFAP utilization rate has decreased to 10.2%, and is projected to be at 12.3% by the end of 2016. This utilization rate is more typical than 2015's 16.2% utilization rate. It is believed that the 2015 spike in utilization was due to the presence of a new EFAP provider, and the increased promotion and visibility of the program at that time. UBC HR actively promotes the program as a core element of UBC's proactive and reactive approaches supporting faculty and staff to be attentive to their wellbeing. Trends will continue to be tracked and monitored.

Information about EFAP utilization and the nature of issues is regularly included in the annual Managing Health Promotion & Absenteeism at UBC report, typically presented to the Board's Employee Relations Committee each June.

Selection Process for UBC's Current EFAP Provider

How Shepell was Selected and the Reasons

- In 2014, the University's joint EFAP committee, which is comprised of representatives from both Vancouver and the Okanagan, as well as from UBC's various staff and faculty unions and associations, engaged in a competitive tendering process to ensure that the University's staff/faculty and their family members are receiving the best possible EFAP service and value.
- The tendering process (Request for Proposals; RFP) was initiated for two reasons:
 - UBC's contract with the former EFAP provider, Homewood Health, expired, and UBC was required to go to market through a competitive tendering process in accordance with public sector best practice.
 - UBC's benefits consultants (Mercer) advised that there may be better value in the EFAP marketplace, as services and prices have become more competitive in recent years.
- 2014 Request for Proposal (RFP) Process:
 - A sub-committee of volunteers from the larger joint EFAP committee was formed, which included representatives from the Faculty Association, AAPS, and CUPE 2950, as well as two University representatives.
 - The joint EFAP committee decided to utilize UBC's benefits consultants, Mercer, to assist with the tendering process by helping to develop questions for the RFP, reviewing and compiling summaries of vendor proposals, assisting in explaining pricing models (which can differ across vendors), and assisting in the scoring process.
 - UBC's Financial Operations department guided the process of drafting the RFP document, and posted it on the BC Bid web site for four weeks, closing on September 18, 2014.
 - Thirteen potential vendors were directly invited to respond, including UBC's current provider, Homewood Health.
 - Four proposals were received, including one from the incumbent provider, Homewood Health.
- The RFP selection sub-committee analyzed the proposals with the assistance of Mercer, and provided a recommendation to the joint EFAP Committee to select Shepell. The joint EFAP Committee voted in favour of awarding the contract to Shepell. This recommendation was based on the following:
 - Shepell received the highest overall score on the RFP evaluation criteria.
 - Shepell is established in Western Canada, and already had a network of counsellors in place to provide service to UBC.
 - They have experience providing EFAP services to other large, post-secondary institutions.
 - They offer comprehensive wellbeing services, including Depression Care, which provides access to an in-house Psychiatrist.
 - They've conducted more research, and offer more services in the area of mental health than other vendors.

- Their prices are lower than what UBC was paying to the previous provider, Homewood Health, and include a five year rate guarantee, resulting in cost savings to the University and employees.
 - They allow flexibility by customizing their service offerings.
 - They offered 20 complimentary lunch and learn sessions per year, waived caps on the number of participants per session, and waived additional travel costs for presenters travelling to the Okanagan campus.
 - Reference checks were very positive; none were negative, and no “red flags” were raised.
- The Vice-President, Human Resources updated the Employee Relations Committee of the Board on the results of the 2014 EFAP Provider RFP on February 2, 2015.
 - Human Resources communicated the change in providers to faculty and staff through a memo on April 1, 2015: <http://www.hr.ubc.ca/memos/new-efap-provider-april-1-2015/>.