

EMPLOYEE ASSISTANCE REPORT

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Volume 13, No. 9
September 2010

supporting EAP professionals

EAPs Invited to Join 'BIG' Initiative

By Eric Goplerud, Tracy L. McPherson, Patricia Herlihy & Dave Sharar

Employee Assistance Programs are invited to join the Brief Intervention Group, or "BIG" Initiative. BIG is an exciting new effort of the EAP industry in the U.S. and Canada to work together to identify and treat employees with alcohol-related problems as a means of increasing overall productivity and engagement in the workplace.

Today, fewer than 10% of issues that U.S. and Canadian EAPs address are recorded as "alcohol" related. But the fact is, many more employees struggle with alcohol-related issues than this number indicates.

Screening, **B**rief **I**ntervention, and **R**eferral to **T**reatment — or SBIRT — is a well-researched practice that has demonstrated consistent success in correctly identifying alcohol needs in employees and assisting them in reducing hazardous use.

However, SBIRT is not widely or

"Alcohol and substance-related problems present a clear threat to employers in terms of productivity loss, safety, employee engagement, use of supervisory time, and health care costs. The problem is that most employees with substance-abuse problems go unrecognized and even more go untreated...However, in most instances, unless someone calls the EAP specifically to request alcohol or drug treatment, substance-abuse problems will go unnoticed."

— John Pompe, Manager of Disability and Behavioral Health Programs, Caterpillar, Inc.
consistently used in our field — at least not yet. By working together to promote routine screening and brief

motivational counseling for alcohol, EAPs will help their corporate customers and their employees to remain productive and healthy.

Together, we can increase EAP call centers' and office-based EAP counselors' adherence to SBIRT evidence-based protocols.

The remainder of this article will describe SBIRT and the BIG Initiative in greater detail.

SBIRT

Risky, hazardous, and harmful

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'BIG' Participants

Employers

- Amtrak;
- Aon Services Corp.;
- Caterpillar;
- CBC Radio Canada;
- Continental Airlines;
- Halliburton EAP;
- JP Morgan Chase;
- Johns Hopkins University and Hospital;

- Maine State Government;
- Mount Sinai Medical Center;
- Norfolk Southern Corp.;
- Northrup Grumman; and
- 3M.

Pharmaceutical

- Reckitt Benckiser Pharmaceutical.

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- ▶ *LifestyleTIPS*®

drinking is associated with physical and emotional health problems, alcohol-related traffic crashes, alcohol-impaired driving, accidents, and alcohol-involved violence.

The financial burden of substance abuse to the U.S. economy is roughly \$190 billion annually in:

- Lost productivity;
- Injury;
- Disease;
- Law enforcement; and
- Criminal justice.

The majority of at-risk drinkers are employed full or part time. EAPs are uniquely positioned to identify and intervene early with at-risk employees *before* their drinking results in adverse consequences or they become alcohol dependent.

The SBIRT uses a brief, valid, scientific, alcohol-screening tool (it takes just 5 minutes or less) to identify whether drinking places an employee at risk for negative consequences. Depending on the results from the screening questions, the EAP clinician may provide health education, simple advice, motivational counseling, and help with an action plan and/or referral for treatment.

Although SBIRT is *not* a treatment for alcohol dependence, it *can* help workers with serious alcohol problems to follow through on treatment referrals. SBIRT is especially well-suited for employees and family members who drink at unhealthy or hazardous levels.

The BIG Initiative

The BIG Initiative is a campaign that engages many of the leading EAP vendors, businesses, EAP professionals, and benefits consultants who are working together to advance the use of SBIRT across the EAP industry. *The intent is to make alcohol screening and brief intervention a routine practice*

across the field by October 2011.

Drs. Eric Goplerud and Tracy McPherson at the Center for Integrated Behavioral Health and Ensuring Solutions to Alcohol Problems, at George Washington University, are facilitating the BIG Initiative.

Employee assistance providers in the U.S. and Canada have been working together since October 2009 to alter the way EAPs screen and manage alcohol problems.

A grant from the National Highway Traffic Safety Administration (NHTSA) and the Center for Substance Abuse Treatment (CSAT) is underwriting the organizing costs of the BIG Initiative.

Since its initial meeting at the Employee Assistance Professionals Association (EAPA) conference last fall, the BIG Initiative has organized a campaign that includes:

- ❖ Employers;
- ❖ The largest national EAP vendors;
- ❖ Many regional and internal corporate EAPs;
- ❖ Professional clinical associations;
- ❖ Federal and state agencies;
- ❖ Benefits consultants; and
- ❖ Researchers.

(Editor's note: See the accompanying story for a complete list of BIG participants.) The focus of BIG is to make alcohol screening and brief intervention for problem solving the universal practice of the industry. The BIG Initiative has organized committees, including:

- *Steering Committee*, made up of senior leaders in the EAP field;
- *Implementation Committee*, focused on changing EAP call center practices;
- *Marketing/Outreach Committee*, centered on office-based clinician training; and
- *Performance Measurement &*

EMPLOYEE ASSISTANCE REPORT

Editor - Mike Jacquart
Publisher - Jennifer Heisler
Circulation - Scott Kolpin
Designer - Kim Simmons

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Accountability Committee, focused on identification of measurement tools to assess program impact on health and business outcomes.

Get Involved

BIG works with all interested EAP providers and suppliers to standardize the delivery of SBIRT within their call centers and networks of office-based affiliates.

The goal of the BIG Initiative is to obtain "buy-in" from the entire EAP industry, EAP providers, suppliers,

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employers, and network affiliates.

If clinicians hear from every EAP whose panel they serve on, that alcohol screening and brief intervention is expected and encouraged, then we can start to change practice.

If every EAP and EAP clinical professional organization's continuing education websites offer consistent training materials on SBIRT, then the clear message will be heard. If EAPs begin seeing RFPs from benefits consultants and employers specifying alcohol SBI, then practice will change.

The BIG Initiative can link EAP vendors, clinicians, employers, and consultants into a learning collaborative. BIG can provide SBIRT materials, call center and clinician webinar and classroom training, over-the-phone coaching, and opportunities to share with EAP colleagues across the industry.

Summary

Working together across the EAP field to implement evidence-based SBI can play a significant role in reversing some of the insidious and devastating effects of hazardous drinking that spill over into workplace health and productivity.



Editor's Notebook

Many thanks to Tracy McPherson and her colleagues for helping spread the word this

month about the **Brief Intervention Group** — or BIG Initiative.

This landmark EAP effort has also been featured on EAPA's website at www.eapasn.org — and in the *Journal of Employee Assistance*.

The BIG effort, as explained in this month's cover article, is designed to "play a significant role in reversing some of the insidious and devastating effects of hazardous drinking that spill over into workplace health and productivity."

I periodically visit inmates in a local jail, and I have been told that probably two-thirds of the prisoners are incarcerated due to alcohol-related offenses and problems.

How wonderful that EAP is undertaking such an industry-wide effort to address this long-standing societal problem — an issue that, as EA professionals know, is a much bigger issue than many people realize — both in the workplace and in society at large. Until next time.

Mike Jacquart, Editor
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A list of key resources appears on page 8 in this month's newsletter. The sidebar on BIG participants begins on page 1. ■

For more information, contact Tracy McPherson at esap1234@gmail.com and/or Eric Goplerud at goplerud@gwu.edu. They conduct research on the

integration of alcohol screening, brief intervention, referral to treatment, and follow-up care in EAPs. Patricia Herlihy, Ph.D., studies the integration of EAP, work/life, and wellness services. She may be reached at p_herlihy@brownbear.us. Dave Sharar, Ph.D., is a provider and evaluator of EAPs and related services. Contact him at dsharar@chestnut.org. (Editor's note: For more on the "Impact of Drinking on the Workplace," see the May 2010 Brown Bagger.)

'BIG' Participants continued from Page 1

Substance Abuse Professionals (SAP) & Experts (SAE)

- ASAP, Inc.

Researchers & Clinicians

- Dale Masi, Masi Research;
- Jodi Jacobson, University of Maryland School of Social Work;
- Karen Chan Osilla, RAND;
- Patricia Herlihy, Rocky Mountain Research; and
- Paul Roman, Center for Research on Behavioral Health and Human Service Delivery, Institute for Behavioral Research.

Consultants

- Attridge Consulting;

- Burke Consulting;
- EAP Technology Systems;
- Psychometric Technologies;
- Sally Lipscomb, The Rainier Group; and
- Tina Thompson.

Government

- NIAAA; and
- Reserve Health Readiness Program, Force Health Protection & Readiness, Department of Defense.

EAP & Behavioral Health Vendors

- Aetna;
- Anthem;
- APS Healthcare;
- Association of Flight Attendants;
- Ceridian;

- Chestnut Global Partners;
- CIGNA;
- Claremont EAP;
- Federal Occupational Health;
- First Sun;
- Freckman & Associates, LLC;
- Magellan Health Services;
- MHN;
- OptumHealth Behavioral Health Solutions (by United Behavioral Health);
- Peer Assistance Services;
- PPC Worldwide;
- Reliant Behavioral Health;
- SELECT, Inc.;
- St. John's Mercy;
- The Oasis Group;
- ValueOptions;

continued on Page 6

Evaluations Improve Employee Performance

Performance reviews are dreaded by many employees. However, the fact remains that they are still a valuable assessment tool, according to human resources (HR) managers surveyed recently by OfficeTeam.

An overwhelming majority (91%) of respondents said that formal evaluations are effective in improving job performance. In addition, 60% of those surveyed said they conduct reviews annually, and nearly one in five (18%) hold appraisals at least quarterly.

“Despite their bad rap, performance reviews benefit both managers and employees, provided adequate preparation goes into them,” said OfficeTeam executive director Robert Hosking. “It’s understood that supervisors must take the time to provide constructive feedback to team members, but workers also should play an

active role in the process. This is their chance to highlight key accomplishments and discuss career aspirations.”

OfficeTeam offers five tips for employees on making the most of performance appraisals:

1. **Sort out the details.** Prepare for the discussion by asking your supervisor for a copy of the assessment form that will be used. Check if your manager has any special requests, such as bringing information about certain projects to the meeting or completing a self-evaluation.

2. **Showcase your accomplishments.** Highlight any kudos or special awards you’ve received for your work since your last formal review. Keep an ongoing list of key achievements to serve as a reminder to you and your supervisor of how your efforts have benefited the company.

3. **Make it a two-way conversation.** Your manager will inform you of areas where you are excelling and those where improvement is needed. Don’t hesitate to ask questions about the assessment — or to request support or guidance.

4. **Share your ideas.** Discuss what you hope to achieve at the company in the future and make sure these goals are in line with your long-term professional objectives.

5. **Follow through.** Regularly review the goals you’ve established and keep your supervisor posted on your progress. ■

Source: OfficeTeam is a leading staffing service specializing in the temporary placement of highly skilled office and administrative support professionals. Visit www.officeteam.com.

Quick Ideas

Change can be Liberating

■ **Look** — Determine what needs to change. Start small. What is ONE behavior or action that can be made?

■ **Importance** — Consider the value of the change. Recognizing that future value will outweigh the status quo can make people more receptive to change.

■ **Blocks** — What are the perceived barriers. Change is often difficult because of obstacles. Identify what they are and take action.

■ **Eliminate** — Believing that obstacles are insurmountable can bring organizational change efforts to a grinding halt. Brainstorm with someone that isn’t “stuck” in this mindset. Entertain all suggestions to see if any are viable.

■ **Reinforce** — Making big changes is easier when we have support. Whether in the form of the EAP, co-worker, etc., support can clarify what’s needed and motivate employees to action.

■ **Assess** — This step could be compared to taking a car for a test drive to see what it can do.

■ **Tweak** — Next, fine-tune your approach and try again.

■ **Engage** — When you make strides toward goals, you’ll become your own best agent of change. ■

Source: Connie Butler, author and personal and professional coach. Visit www.conniebutler.biz.

Financial Common Sense Needed

By Louis Scatigna, CFP

The economy is a mess, and there are two sides to the cause. Yes, the big banks and investment houses were lending money through high-risk products without an ounce of sense to the outcome.

However, for them to be knee-deep in bad investments, they had to be selling them to someone. All those high-risk mortgage loans belong to people who were buying more house than they could afford and they knew it. People with high credit card debt weren't having their arm twisted by the credit card companies. They were given the chance to live beyond their means, and now they are paying for it.

A lot of these troubles would correct themselves if the average American just buckled down a bit more, and exercised some restraint and common sense. My tips for getting through financial hardships include:

\$ Pay down your debt — When you have a little extra money to spend, use it to pay extra on your credit cards. In many cases, paying the minimum balance on your credit cards won't reduce your debt by much. A simple \$10,000 balance could take 15 years to pay off if you stick to minimum payments.

\$ Stop using credit cards, sort of — A typical American carries roughly \$7,500 in revolving debt, and this is going to get worse if people don't stop using their credit cards for things they don't need. Unfortunately, if you have credit and don't use it, it may adversely affect your credit rating. Try this: Buy something *small* with your credit card, or use it to buy groceries once a month, and pay it off with the next billing cycle. This will keep your card active, and the regular use will reflect positively on your credit rating.



\$ Use cash whenever possible — Debit cards can be deadly because they're so easy to swipe and forget. The problem is, many people operate without a clear picture of what they have in their checking accounts. If you can track your debit card use closely, do so. If not, using cash for specific purposes and sticking to those budget items is a low-tech way of keeping your finances straight.

\$ Only spend what you have — If you don't have it in your checking account, don't spend it. Many households get into trouble because they are spending their money on things they really don't need. Make a budget and stick to it, even if it hurts a little for now. When your cash flow increases, you can relax the rules. Buy what you *need*, not what you want. ■

Louis G. Scatigna, CFP, is a financial expert and author of The Financial Physician: How to Cure Your Money Problems and Boost Your Financial Health. To find out more, visit www.thefinancialphysician.com.

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Connecting with the Younger Workforce: *Part II*



By Ken Whiting

Part one of this two-part article discussed a number of recommendations to take into account about today's new generation of workers. This month's article addresses the remainder of these recommendations:

❖ **Society and culture** — With access to credit cards, we have evolved to a consumer-driven society, dominated by brand names. In many cases, role models have moved away from a local positive adult influence to distant celebrities who can easily disappoint. All of these things have shaped what teens and young adults expect in the workplace.

Moreover, preparation for entry-level, hourly, and seasonal jobs rarely occurs. Parents and schools have tended to abdicate this responsibility, and young adults honestly don't see the cause and effect between a part-time job and the million-dollar lifestyle they aspire to. As a result, teens and young adults are less ready for the workplace than previous generations.

➤ *Workplace tip:* Smart employers will tackle this challenge by setting honest expectations upfront, and mentoring younger workers on a regular basis so they stay on track with their future goals.

❖ **Appearance** — Self-expression has always been a high priority for teens. Tattoos, body piercings, and different hair colors are not acts of rebellion. Carving out one's individuality is a natural response to the bombardment of messages that young people receive on how to look and act.

➤ *Workplace tip:* Don't pass judgment simply based on appearance. As a rule, it's not a reflection of their performance. Remember that teens and young adults are used to seeing things differently, and are more accepting of other cultures and differences.

❖ **Speed is everything** — Today's youth have been raised in a 24/7, got-to-have-it-now world. From Main Street to the Internet, in their lifetime companies never close for business. As a result, don't expect to witness patience as a virtue in your workplace.

➤ *Workplace tip:* Use this fact to your advantage by encouraging multitasking in the office. Teens and young adults are used to managing multiple projects at once, so don't feel the need to look over their shoulder constantly.

Summary

As different as these areas may be from the way you were raised, today's teens and young adults are as capable as any generation before them. Understanding and appreciating the unique environment they have been raised in is often the first step in making real progress with younger staff.

Take the time to consider how to use their skills in your business and watch your productivity and profits soar. ■

Ken Whiting's WAVES for Success program teaches companies what inspires young adults and teens to participate, contribute and excel at work. For more information, visit www.wavesforsuccess.com.

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How We're Doing!*



'BIG' Participants *continued from Page 3*

- WellPoint; and
- Workplace Options.

Associations, Professional Groups & Business Coalitions

- Center for Clinical Social Work;
- Employee Assistance Professionals Association (EAPA);
- EAPA Washington, D.C. Chapter;
- EAPA Chesapeake Chapter;
- EAPA South Carolina Chapter;
- Employee Assistance Research

- Foundation (EARF);
- Employee Assistance Society of North America (EASNA);
- Hawaii Business Health Council;
- NAADAC;
- National Business Consortium; and
- National Business Group on Health. ■

Sources: Eric Goplerud, Tracy McPherson, Patricia Herlihy, and Dave Sharar.

Knowledge Transfer is Critical to Companies' Success

Most companies do not have a plan to manage and transfer knowledge in spite of a growing number of retiring Baby Boomers, according to a report from the Conference Board, a global research and business membership organization.

"As the Baby Boom generation of corporate leaders and experts approaches retirement, businesses in the U.S., Canada, and many European nations face the loss of experience and knowledge on an unprecedented scale," says Diane Piktialis, Mature Workforce Program Leader at the Conference Board and co-author of the report.

"Younger workers can't be counted on to fill the void, as they lack the experience that builds deep expertise," Piktialis adds.

The result can be a significant drain of business wisdom that decreases innovation, lowers growth capacity, and reduces efficiency in the organization.

Effective and sustainable knowledge transfer is complex in

organizations. Since knowledge doesn't exist in a vacuum, it is important to first identify and evaluate what kind of knowledge company executives are interested in capturing.

Because knowledge is complicated, it is also vital to validate and document it. Most successful transfer efforts are almost always a "two-way street." It's more obvious how the "receiver" of the information gains, but the source of the knowledge may need to be persuaded of the value of the process.

Generation Gap

Technology has created a larger gap between the outgoing and incoming workforces than employers have ever experienced.

Employers need not build generational considerations into every aspect of information sharing in their organization. However, bear in mind that today's "mentees" (those being mentored by older workers) may prefer getting text messages in real time rather than

meeting or talking according to a set schedule.

Companies considering or using knowledge transfer processes, should assess their readiness for text messages, blogs, podcasts, and others.

Impact on Bottom Line

There is a growing business case for effective knowledge transfer, with benefits that include increased productivity and profits.

"Knowledge transfer is not as widely practiced as the potential business benefits and workforce demographics suggest it should be," concludes Kent Greenes, co-author of the report.

"In a knowledge economy, firm-specific knowledge is critical to the sustainability, performance, and innovation of organizations facing the imminent retirement of large numbers of Baby Boomers." ■

Source: "Bridging the Gaps – How to Transfer Knowledge in Today's Multigenerational Workplace," by the Conference Board.

Quick Ideas

You Know You're Being Bullied When...

You attempt the impossible task of doing a new job without training or time to learn new skills, but the work is never good enough for the boss.

Human Resources inform you that your harassment isn't illegal, that you have to "work it out

between yourselves."

You firmly confront your tormentor to stop the abusive conduct, but you are accused of harassment instead.

You are shocked when you're accused of incompetence despite a history of excellence,

typically by someone who cannot do your job.

Your request to transfer to another position under another boss is mysteriously denied. ■

Source: Workplace Bullying Institute.

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What EA Professionals Should Know About Retirement Planning: *Part I*



Two years ago the financial and economic markets began to melt down, triggering an almost complete systemic collapse, leaving employees across the globe in a state of panic.

HR departments were left to flounder as they were flooded with calls from participants worried about their personal company retirement plans.

EA professionals were able to provide emotional support to these frantic clients, but not concrete financial information.

However, even when financial crises *aren't* looming, experts agree that perhaps as many as 70% of Americans are misallocated in their employer-provided retirement plans (i.e. 401(k)s, 401(a)s, etc.).

So, why are 70% of employees misallocating their funds, especially with all of the advice that is available to them?

The Problem

Is the issue that people “go without” because there are no providers for a service they need?

Or, conversely, are there so many providers the employee gets overwhelmed and shuts down? It may be a little of both.

On the one hand, there clearly isn't an established source of experienced Certified Financial Planners™ who only offer specific advice to plan participants.

Conversely, there are many providers who tout themselves as “retirement experts,” “retirement advisors,” etc. They offer these services conditionally — that is, if you buy a product from them or pay them an hourly fee, etc., they will “advise” you. Consequently, many employees choose to do nothing and let chance take them where it may.

Why not let the 401(k) provider offer investment advice to employees? *ERISA* guidelines protect the average employee from conflicts of interest from plan providers. They are allowed to offer general investment and financial education to employees.

However, they need to be careful and cannot provide specific fund advice as to how an employee should specifically invest or allocate investments in the employer plan.

Unfortunately, many employers and employees don't know this! They think their plan providers are allowed to offer specific retirement advice because their representatives give seminars to employees at regularly scheduled times throughout the year or provide a toll-free number that employees can call.

However, *ERISA* guidelines prevent plan providers from providing investment recommendations. All employees are to receive is general education regarding their employer-provided retirement account. Of course, this information falls short of being the specific advice employees seek, which is — “*What exact funds should I be investing in for my situation?*”

NEXT MONTH: The author discusses employer priorities and offers a solution in the conclusion of this two-part article. ■

*Source: Sean T. Ruehl CFP®, President and co-founder of RJ20, Inc., www.rj20.com — online Certified Financial Planners™ that serve as ERISA fiduciaries in helping employers provide objective and conflict-free advisory solutions to employees' retirement plans. **Editor's note:** This article is reprinted with permission from the Employee Assistance Professionals Association (EAPA), www.eapassn.org.*

Resources

- 🔗 **Employee Assistance Programs: Workplace Opportunities for Intervening in Alcohol Problems** — www.ensuringsolutions.org/usr_doc/Primer5_EAPs.pdf.
- 🔗 **Brief Intervention: Cost-Effective Help for Problem Drinkers** — www.ensuringsolutions.org/resources/resources_show.htm?doc_id=329150.
- 🔗 **Alcohol Screening: A Quick First Step to Reduce Problem Drinking** — www.ensuringsolutions.org/resources/resources_show.htm?doc_id=328506.