

Handling Difficult EAP Cases Conversation with Master CEAPs

By Sherry Courtemanche, LICSW, CEAP; and Laura Jacobson, LICSW, CEAP



As employee assistance professionals, we regularly negotiate challenging situations that call on us to think compassionately, creatively, and work collaboratively while navigating dual relationships and layers of organizational dynamics. On any workday, we may be presented with an employee undergoing a mental health crisis and need to drop everything to attend to that employee. Other times the situations are more complex, requiring us to intercede between leadership and work teams.

Whether we are providing the services ourselves or referring to additional resources and supports, organizations depend on us to make sense of complicated issues quickly and seamlessly while maintaining the confidentiality of all parties.

Introduction

The goal of this article is to provide a platform for sharing best practices commonly faced by EA professionals. This article, through a conversation with two of EAPA's *EACC Commissioners, confronts navigating "dual client relationships" within one organization

and the complex work performed to support everyone involved, even when interests were not aligned.

* The Employee Assistance Certification Commission (EACC) is the policy-making body for all professional certification activities and oversees and informs EAP certification guidelines and standards.

Background

*Susan was just finishing up her first year at Longfellow Manufacturing as an HR Business Partner when she was formally referred to the EAP. She reported directly to *Jane, the HR Director, and to *Nathan, the plant manager at the site where she worked. Susan and Jane had a contentious relationship dating back to the start of her employment.

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They had significant disagreements about new processes and procedures and Jane reported that Susan would, at times, completely disregard Jane's directives and would be insubordinate and would "do what she wanted."

Jane also described Susan as "overly emotional" as she would break down in tears and become unable to continue a conversation when she was given direction and criticism. Jane also noted that Susan would regularly not follow through on assigned tasks and would shift work to other people. Susan agreed that she and Jane would often lock horns yet she did report that her relationship with Nathan was good, and that he had always been supportive of her as well as friendly and collaborative.

**Names and additional case details have been altered to preserve confidentiality.*

As Susan's one-year performance review approached, both Jane and Nathan met with Susan to have a preliminary discussion about her strengths and areas for improvement. Jane shared that she felt Susan would often delegate work to others and did not consistently follow through with tasks. Nathan agreed and Susan stormed out of the meeting stating she was too upset to continue the conversation. At this point, Susan felt that Nathan was not "on her side" anymore and that he had shifted his allegiance to Jane.

It was at this time that Jane reached out to the EAP (external) and spoke with one of my colleagues who became her consultant. Jane was looking for strategies that she and Nathan could use to have a productive dialogue with Susan and share their concerns about her work performance.

In addition, they were concerned about how emotional she would get both in private conversations with Nathan and in front of others. My colleague worked with Jane developing a Performance Improvement Plan (PIP) and on the language they could use with Susan.

The following week, Jane and Nathan met with Susan for her official review. Again, they shared their concerns, and put in place a Performance Improvement Plan (PIP). The purpose of the PIP was to highlight the specific concerns about Susan's work performance, and to identify steps that Susan needed to take in order to stay in her job at Longfellow Manufacturing.

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The plan stated that Susan needed to meet with Jane more regularly to review her responsibilities and how she was managing her assignments, keeping tasks assigned to her and not moving them to other employees, keeping her emotional responses appropriate to the work setting, and meeting with EAP.

They asked Susan to sign a Release of Information (ROI) allowing EAP to confirm with Longfellow that Susan had reached out to EAP and was meeting regularly, which she refused to do. During this meeting, Susan brought up new allegations that Nathan had, in fact, behaved inappropriately over the last year.

She cited examples during which Nathan would swear out loud in front of large groups of employees and would outwardly speak negatively about his subordinates and co-workers. Her opinion was that if she was being asked to speak and act more professionally in the workplace, others should be held to the same standard.

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Susan eventually followed through and reached out to the EAP. During our initial session I took plenty of time to explain the objectives of a manager referral and outline the boundaries of confidentiality within our relationship. This ensured Susan had a good understanding of what was expected of her and what information would be shared with her employer. She agreed to sign a release of information and participate in the EAP.

Susan explained her work concerns, how she felt Nathan had been inappropriate and shared volumes of email exchanges between her and both Jane and Nathan.

Susan reported feeling hurt, specifically by Nathan, and I could see that her tone was negative and challenging in emails she sent to both Jane and Nathan. She also told me that she had met with the president of the company to share her concerns about Nathan's behavior and she believed that he took her allegations seriously and would be investigating Nathan's behavior further. She was convinced that he would "set things straight".

Over the course of several sessions, Susan began to trust in the boundaries of the EAP and our work together enough that we could engage in the constructive confrontation process. She and I discussed how others may experience her reactions and specifically reviewed some of the language she had used which was viewed negatively. She agreed that she could have handled herself differently but was reluctant to take much responsibility.

In the meantime, Jane continued to consult with my partner who was able to share that Susan was participating in sessions with me. Despite this, Jane did not feel that Susan was making any progress in addressing the work performance issues that had been identified and was not confident that Susan would be able to change her behaviors.

Jane asked for specifics of the EAP sessions, which my partner reiterated we could not share. Jane also indicated that she had spoken with the president of Longfellow who said that he wanted professional mediation between Susan, Jane and Nathan.

Jane asked us to provide that service or find someone who could. At this time, Susan shared with me that she was sure that the president of the company was fearful that, if she were ultimately fired, she would sue them for wrongful termination for



Editor's Notebook

For Editor's Notebook, see "Staying Calm in a Pandemic" at <https://www.writeitrightllc.com/blog>.

bringing up allegations about Nathan's behavior. She also told me that she had spoken with her brother, an attorney, who indicated that she would have a legitimate case.

As part of the full-service scope of work we wanted to provide, I then sourced a professional mediator who could work with Susan, Jane and Nathan. Neither my partner nor I has the expertise to conduct professional mediation services and we felt that Longfellow, and the individuals involved, would best be served by someone trained in this work.

I then reached out to Mediation and Consulting Group and sourced an expert who would work on the case. The mediator's role would be to meet with the three parties separately and then together to come to some resolutions about how the team could work respectfully and cooperatively moving forward.

The mediator and Longfellow then worked directly with one another to establish a scope of work and participate in the mediation sessions. The mediator would meet with each of the three parties separately to hear concerns and goals, and would then bring the group together to discuss how they could work respectfully and cooperatively moving forward. The mediator shared with me that these types of cases usually involved two or three group sessions following the individual consults.

According to all parties involved, the mediation did not go well, and Susan reported feeling that Longfellow was trying to find reasons to get rid of her. She reported to me that both Jane and Nathan were dismissive of her claims and were rude and unapproachable during the sessions. She also described how she reacted, which sounded, to me, aggressive and disrespectful as well, with little insight about how she came across to others.

Susan continued to meet with me, and I continued to offer support and guidance about how she could

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Is Your Spouse Financially Unfaithful? – Part II

By Gary Foreman

Infidelity. It can be a stiletto through the heart of a marriage. The hurt. The loss of trust. The feelings of being cheated upon and used. Could it be happening to you right now and you not know it?

According to a recent online poll, 1 in 20 Americans admit to having a checking, savings, or credit card account that their spouse or significant other doesn't know about. (*source*: CreditCards.com) That means that over 13 million people are cheating on their mates.

Last month, we discussed how financial infidelity starts, and how to spot financial infidelity. Next, we'll discuss how to avoid these nasty scenarios in part II.

How to Avoid Financial Infidelity

The best way to avoid financial infidelity is for both partners to be involved in the couple's financial affairs. You might not need a budget to keep from overspending, but it is a wonderful way for both partners to share financial information.

Smart couples start the conversation before they get married. That way, any differences in how they handle money can be resolved before they cause trouble. It's common for both people to have deeply held beliefs about money. Those beliefs can clash or even cause one person to go underground with their finances to avoid confrontation.

Give each other some space to make choices without consultation. Many couples find that it helps if each person has a small amount each month to do with as they wish. The agreement is that each of them can use the money for anything they want without judgment from their mate.

Have a solid financial plan. Financial troubles are typically the #1 or #2 cited reason for divorce. It's easier to be truthful when there's some financial room for mistakes.

How to Fix Financial Infidelity

If your mate has been financially unfaithful, it doesn't mean that your marriage has to end. However, like any unfaithfulness, it will take time, counseling, and a change in behavior to survive.

Begin by having a serious discussion about money. You may want to have a third person there to help keep things calm. Focus on seeing where your deepest beliefs about money are different and what you can do to accommodate those differences.

Make sure you understand why the financial infidelity occurred. Whatever the source, you need to address it to prevent a recurrence.

Commit to regular, frequent, open book financial sessions. Review your brokerage, retirement account, savings account, and any credit card account statements together. Discuss any unusual items.

Simplify your finances, especially closing unneeded credit card accounts. Do everything you can as a couple to rebuild honesty and trust in your financial affairs. ■

Gary Foreman is the editor of The Dollar Stretcher (www.stretcher.com), which has been helping people live better, for less since 1996. Editor's note: Money Matters provides EAR readers with practical tips to share with their employee clients who may be having personal finance problems.

EMPLOYEE ASSISTANCE REPORT

Expanded Focus

With articles on workplace trends, news, and benefits, *EAR* is a valuable resource not only for EA professionals, but also for **Human Resources**.

While EAP will always remain our *primary* focus, HR Corner has been appearing in each issue.

What resource other than *EAR* can present articles and suggestions on how EAP and HR can work **together** for employees' benefit?

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The Loneliness of Leadership – Part II

By *Melanie Parish*

Being a leader is lonely work. You can't express doubts to your boss because you don't want them to doubt you. You can't express your doubts to the people you manage because you don't want them to know you aren't sure of yourself. But there *are* ways you can ease the loneliness. Several of them are listed below. The remainder were presented in part one of this two-part article.

❖ **Manage up.** Create allies in the people in the organization above you. They believed in you when they promoted you, help them see you succeeding. Share positive triumphs regularly and ask for advice on challenges they might be able to help you with.

This can't be contrived—you have to genuinely respect them and their opinion. If you trust them, then they can become your allies, and you can become their confidante over time. Make sure to keep their secrets and you will start to become important to them. You will start to have a better understanding of what is happening in the organization. Loneliness is worse if you are out of the loop.

❖ **Be interesting.** Allow yourself to have interests outside of work. Have friends. Have dinner parties or cocktail parties. Experiment with hobbies. Take most of your vacation time (I know it can be hard). You will have to navigate your own workplace culture around vacations, but your life will be fuller, richer, and more fulfilling if you have a life that is deeply interesting outside the office. Leadership will feel less lonely if it is a part of a larger context of fulfillment.

❖ **Practice extreme self-care.** Leadership is hard. Between imposter syndrome and emotional labor, the job itself can take its toll. Learning to replenish is important. When things get tough, reach for the vitamins and vegetables instead of the margaritas and martinis. A massage, a good haircut, a manicure, or a personal trainer can help you feel like someone cares about you. It will show that you care for yourself.

Summary

Leadership is hard. Lean in, connect with others, engage, and find the real relationships all around

you—your colleagues are probably a little lonely too. You *can* find a path around the loneliness. ■

Melanie Parish is a public speaker, author, and Master Coach. An expert in problem solving, constraints management, operations, and brand development, Melanie has consulted and coached organizations ranging from the Fortune 50 to IT start-ups. She is the author of "The Experimental Leader: Be a New Kind of Boss to Cultivate an Organization of Innovators." For more information visit www.melanieparish.com and connect with her on Twitter, @melanieparish.

On the Job

Tips for Coping with Depression

Do any of your employee clients with depression struggle to make it through their workday? As well as the obvious – help from the EAP – the following are some additional coping strategies from Blue Sage Career Strategies:

❖ **Start with small changes at work.** Is it the employee's job that's actually making him depressed? Both internal and external factors in the workplace can contribute to depression. Ask the client to take a look at this list of reasons his job may be making him depressed and identify some small changes that might make a big difference. Sometimes, even a change as simple as making taking a 30-minute lunch break *out of the office* can do a world of good.

❖ **Break assignments or tasks into small chunks.** The employee client with depression needs to ask, "What is the first thing I need to do for this project?" Work with a manager to break the assignment into small pieces and set reasonable deadlines for each piece. Working in small chunks feels more manageable and less overwhelming than looking at a massive project the employee may be facing.

❖ **Allow extra time to complete job-related tasks.** Brain fog is real. It takes extra time to cut through the fog and complete a task. It's important for the employee to acknowledge that he is moving a little slow and allow more time to complete each task. The client is recovering from an illness and needs to give himself a break. ■

Suggestions for Retaining Employees

Employee turnover in the US is up to four times higher than the global average of 10.9% according to research by global workspace provider Instant Offices, costing US businesses *trillions* each year due to job satisfaction! Most significantly, **77%** of the reasons why employees leave could have been prevented if a few key strategies were set in place.

By implementing a few key strategies to retain talent, it doesn't have to be this way in 2020. Global Head of HR for The Instant Group, Lucinda Pullinger offers six simple ways for businesses to invest in employee retention:

1. Offer Improved Work-Life Balance: A recent survey revealed that 62% of Americans did not apply for a job because of the commute that would be involved. A growing majority of workers are looking for jobs that offer better work-life balance, a flexible schedule, and the option to telecommute. Start small, by offering more flexible hours or the option to have a desk closer to home.

2. Discuss Career Growth Opportunities: Career development is the leading reason behind turnover in the US. If you see the potential for your employees to grow, develop a clear career progression plan to help them get there. Communicate this to them during performance reviews, and make them aware of their potential prospective career paths. It is also important to have succession planning in place, with development plans in place to help team members accelerate to their next role when needed.

3. Promote Learning and Development: Encourage learning and growth to help employees develop skills and stay motivated. This goes hand-in-hand with career growth opportunities, and *it doesn't need to cost anything*. On-the-job training and getting involved with new assignments outside of the day job are all ways to learn and develop – as well as formal courses, mentoring, work rotation schemes, buddy systems and workshops.

4. Re-evaluate Compensation: While retention is about more than just money, compensation is still a

significant motivator for staff turnover, with 10% of employees admitting it's their main reason for leaving. Review salary structure regularly to ensure that you are offering competitive pay and benefits to staff.

5. Recognize and Reward Achievements:

Acknowledge the efforts and accomplishments of employees. This will help them to feel more valued, motivated, and engaged. Special achievements can be rewarded with a bonus or company award, inspiring more employees to go above and beyond.

6. Improve the Conversation: Managers should be having important conversations with their teams regularly, but according to exit interviews, 51% of employees say that in the three months leading up to their decision to leave, neither their manager nor any other leader engaged them on job satisfaction. Encourage regular and meaningful catch ups between managers and employees to talk about the future of their work. ■

Resources

🔗 **Employee Benefit Adviser** features workplace benefits news for advisers, brokers, and consultants, as well as tools for business growth and development. Visit www.employeebenefitadviser.com

🔗 **CareConnect USA** publishes reputable helplines for financially stressed employees and their families. The vetting process of service providers is extensive and ongoing. Check out <https://careconnectusa.org>.

🔗 **Human Resource Executive** recently released what they consider to be the best HR and training during the past 12 months. Learn more at <http://hr-executive.com/leading-the-pack/>

🔗 **Job Accommodation Network** is a leading resource on the Americans with Disabilities Act, including suggestions for workplace accommodations, which the EAP can help devise. Go to <https://askjan.org>. ■

manage her feelings and keep her reactions more centered and appropriate to a work setting. She did state she felt the sessions were helpful but, ultimately, she was terminated. I do believe that she is currently in the process of filing a lawsuit.

Sherry: *How were you able to simultaneously provide the emotional support Susan needed in this situation and help her address her negative behaviors in the workplace?*

Laura: I know it's not always possible, but in this particular case, having my colleague consulting with Jane exclusively while I worked with Susan allowed for a beneficial degree of separation. I was able to utilize motivational interviewing skills, which emphasizes using a directive, patient-centered style of interaction to promote behavioral change.

I was also mindful of meeting Susan where she was by communicating my interest in understanding her version of reality. I believe Susan felt supported by me and as a result, she was able to navigate the negative experiences at work and open to reflecting on her behavior.

I reviewed confidentiality and shared that I was genuinely concerned about her well-being and was interested in helping her determine what was best for her in this situation. Because I was honest with her, compassionate and kind, I believe this helped foster the trust that I could be helpful to her.

Sherry: *While this case originally focused on Susan's behavior in response to her performance review, there are some complex dynamics between Susan and her two managers, Jane and Nathan, which contributed to this situation. What was your strategy to address both Susan's needs and the workplace dynamics in this case?*

Laura: There were clearly personality conflicts that were exacerbated given the work performance issues. I do believe that if Susan had a more positive relationship with Jane before the conversations about her performance, she would have reacted differently.

I also felt badly that Susan believed Nathan had betrayed her as he could have positively influenced the situation had he maintained a positive relationship with her.

I could clearly see that the issue of trust was important to Susan and that if she could trust me that would go a long way in my being able to support her emotionally. This also enabled me to gently challenge her to look at how her behaviors may have been experienced by both Nathan and Jane.

I believe it is crucial to establish expectations up front. Both my colleague and I were clear that we could only confirm whether Susan scheduled and kept her appointments with EAP and nothing specific about the nature of her visits with me.

My colleague, who was working with Jane, focused on helping her manage boundaries and on managing Susan's work performance only. Although Susan was often emotionally charged, Jane needed some guidance around not becoming emotionally charged herself.

Additionally, Jane needed to be reminded several times about the limits of confidentiality as she would often ask for specific information about Susan's sessions with EAP.

Sherry: *It seems as though the request to bring in a professional mediator indicated a "no confidence vote" in the ability for the EAP to manage the situation. Was this your interpretation?*

Laura: No. In fact, Longfellow originally asked if we could provide the mediation, but we explained that this service would best be provided by trained professional mediators. We still sourced the mediation group and did all the advanced work necessary to get Longfellow established with Mediation and Consulting Group.

Sherry: *What was the biggest challenge for you in navigating the dual client relationships in this case?*

Laura: Bringing in a professional mediator was necessary but also a complicated thing for me. Since the mediator was working directly for Longfellow as an organization (they were paying her), there was nothing in place that allowed the mediator to share information with me or my colleague. This made sense from a confidentiality perspective, but I was then relying only on Susan's report to me about the mediation sessions. If I had

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first-hand knowledge of the sessions themselves, it may have informed some of my individual work with Susan.

In addition, Longfellow is one of our biggest EAP clients and although I would not compromise my clinical work with any individual client, it was still very much in the back of my mind that we also needed to do what was best for Longfellow. In this way, it was helpful to have a colleague who could manage the relationship with Jane and Nathan.

Sherry: As you reflect on this case, were there any unexpected lessons that came out of working through this situation that could help other EA professionals navigating similar situations?

Laura: I learned the importance of setting clear expectations up front both with the individual client and with the organization itself. Although we were clear about what we could and could not share, we did not provide this in writing to HR and we found that we did need to reiterate

Quick Ideas

Myths of Addiction

1. Addicts are weak-willed people who can quit if they want to.
2. Addicts don't have a drinking problem if they don't drink before 5 p.m.
3. Addicts have to reach rock bottom before they can get help.
4. People of faith don't have substance use issues.
5. Addicts don't care about the effects they have on others. They just want to get their fix. ■

Source: Mary Spaulding, Norman, OK.

In the News

History of EAP Available

The Employee Assistance Research Foundation (EARF) is pleased to announce the open access release of its latest research initiative: "The History of EAP in the United States," written by principal investigator Dale Masi, PhD, CEAP, Professor Emeritus at the University of Maryland and former director of the MSW EAP specialization program.

The book addresses a critical deficiency in the EA knowledge base: the need for a definitive resource that accurately documents the history and evolution of EAP in the U.S.

The history covers antecedents and early years, the emergence of external providers and the affiliate network model, continued expansion/diffusion/integration in the 1990s and 2000s, and future directions. It can be downloaded for free here: http://www.eapassn.org/Portals/11/Docs/EAP%20History/The_History_of_EAPs_in_the_US.pdf. ■

the limits of confidentiality several times during the course of the work.

On multiple occasions, HR asked for detailed information of my sessions with Susan which I would not share. My colleague needed to remind Jane several times about the limits of the information we could provide. **Perhaps something in writing, up front, to HR may have helped avoid this confusion.**

In addition, I should have asked for a ROI to be signed by everyone involved in the mediation sessions (Susan, Jane, Nathan) so that I could have spoken with the professional mediator directly. Again, this might have helped with my individual work with Susan.

Sherry: Thank you for sharing your experience with the *EAR*.

Laura: It has been my pleasure. ■

At the time of this writing, Laura Jacobson, LICSW, CEAP was the Clinical Director at CompEAP in Marlborough, MA. She has since started a new position with KGA, Inc. in Southboro, MA as EAP Clinical Director. Laura has 29 years of experience in the mental health and EAP field with a specialization in systems work that includes critical incident interventions, supervisor trainings, employee seminars and Human Resource/Supervisor consultations. She may be reached at jacobsonlaura@yahoo.com.