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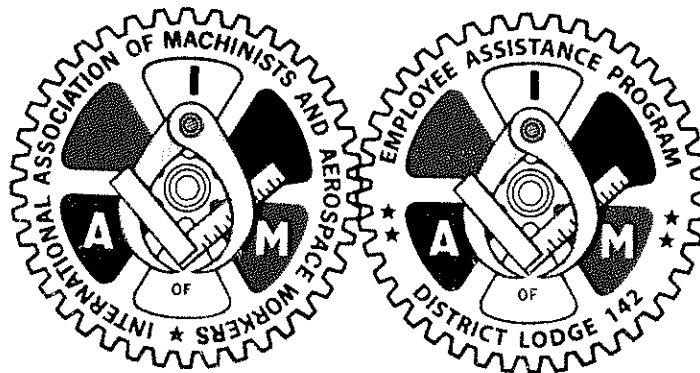
DISTRICT LODGE 142

400 N.E. 32nd STREET • KANSAS CITY, MISSOURI 64116
816-452-6646 • FAX: 816-455-4793
iamdl142@swbell.net

District Lodge 142

Employee Assistance Program

Coordinator's Manual



E.A.P.

Geared to Help

Employee Assistance Program

Director: Paul Shultz

3100 C Piper Lane

Charlotte, NC 28208

(704) 357-3089 – Office

(704) 907-3563 - Cell

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August 5, 1993: LETTER ON POLITICS AND DUAL POSITION HOLDING

A C K N O W L E D G M E N T S

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And, to the past and present leadership from all levels of District Lodge 141, I am appreciative of their years of unwavering and continued committment to the EAP.

CEAP

Regis G. Wasiecko, BA.

Director EAP
District Lodge 141

January, 1993

rev 1/96

DISTRICT LODGE 142 -- IAMAW
EMPLOYEE ASSISTANCE PROGRAM
COORDINATORS MANUAL

Employee Assistance Program
Director
Paul M. Shultz
3100-C Piper Lane
Charlotte, BC 28208
(704) 357-0027

PROPERTY OF DISTRICT LODGE 142 IAMAW

This manual is for IAM EAP Coordinator use only. It is to be passed on to your successor should you leave the station, or cease being an IAM EAP Coordinator. In the event no one replaces you, this manual is to be returned to District Lodge 142 -- Machinists Union.

It is expected that you will review the entire contents of this manual on an annual basis in order to refresh yourself with your duties and responsibilities as an IAM EAP Coordinator. It is also designed to remind you of the the qualifications you brought to this program and to help you reflect on the motives that inspired you to become a coordinator. As you are processing these thoughts, it would be a good idea to look at how your perceptions of the Employee Assistance Program might have been altered.

Because the Coordinator functions in possible sensitive situations it is absolutely vital that the Coordinator keep EAP functions and the discipline systems separate and remain non-active in company and union politics. There may be times when the Coordinator will disagree with professional judgments. In these cases, and if possible, the coordinator can discuss the disagreement with the evaluating professional. Never-the-less, the Coordinator must refrain from any public comments which would negatively reflect on the EAP process.

MISSION STATEMENT

The District Lodge 142 Employee Assistance Program (EAP) goal is to motivate troubled employees to seek and accept professional assistance within the constraints of the respective negotiated company benefit plan.

The EAP Coordinator's function within the program is to provide education and awareness of the EAP, advocate for and support the principles and tenets thereof, and direct employees to an appropriate and qualified professional evaluation resource.

The Coordinator is to function as a team member with management and other union entities whenever possible. The Coordinator may also assist employees returning to work after a treatment experience. Coordinator activities are described in this manual.

Employee evaluation, diagnosis and treatment regimen methodologies are not components of the District Lodge 142 EAP Coordinator job description.

FOREWORD

From the earliest of times, and in particular 1935 with the birth of Alcoholics Anonymous by a New York broker and a well-known surgeon, people have been helping each other to deal with life's problems and cope with stress in one way or another. Over time this process has gone through various stages of evolution and will continue to evolve. The Employee Assistance Program (EAP) falls into this realm of people helping people and is a dynamic force.

To remain a viable entity with clear purpose, credibility and respect, the EAP must change to reflect current realities and circumstances. The District Lodge 142 Program has gone through its share of adjustment and correction since its inception and will continue to respond to societal dynamics. This manual is a response to the pressures and challenges of EAP in today's workplace and society.

12 STEP programs are very successful. The formation of support groups suggests that theorists, scholars, and professionals don't have all the answers. The professional community has encouraged this effort and continues to endorse the support group philosophy.

Both support groups and professionals are important in the helping process.

Since the mid 1970's the District Lodge 141 Employee Assistance Program on the various properties the District represents has been helping thousands of our members and their families with a variety of problems and troubling situations. The result of these various programs has been the saving of hundreds of employee jobs.

In many instances, serious health and family problems have been avoided. We all can be proud of those who pioneered the EAP and brought us this far. But, with growth and progress comes the need to adapt to many new challenges and opportunities and thus remain a viable entity in the movement.

The District Lodge 142 EAP believes that with more and more emphasis being placed on people to become EAP professionals, many important basics are being ignored, namely the vital function of a coordinator peer group. Peer groups are the intervening arm of EAP which gets most people into help in the first place. Not very many Ph.D.'s, etcetera, are in the field doing the leg work. None-the-less, there is a lot of clamor to encourage individuals to become a CEAP, MSW, LCSW, or whatever. In the process and rush EAP is getting short changed and is developing a negative reputation; some problem areas are discussed below. But, the *impression* is that because "letters" don't accompany John Doe coordinator's name he is not acting in a "qualified" and/or appropriate manner. But, the fact remains, over time the coordinator peer group has done the job, performed it well and will continue to do the job, albeit, some changes will be

inevitable in the structure of EAP.

Some examples of inappropriate Coordinator activity which can cause problems for the EAP movement would be: evaluating/diagnosing an employee, independent referral and trying to intervene inappropriately. Activities of this nature will and does reflect negatively on the union and the peer coordinator system.

This manual will promulgate qualifications, job descriptions, responsibilities and procedures. This is not an end all effort but a continuing response to the changing times in which we live.

Coordinators do not function as a separate entity but operate in conjunction with their company benefit plan and EAP system. Where the manual diverges from the Coordinator's respective company policy or procedure, that company's policy or procedure will apply.

The goal of this EAP manual is to make the program accountable, focused, and sensitive to the needs of others and their environments while at the same time recognizing our limitations (in our particular case the workplace).

INTRODUCTION

The Union recognizes that employees may have problems which affect their job performance and their health. Dependence on alcohol and other mood altering chemicals, family problems and emotional problems are some examples.

The Union believes it is in the interest of the employee, of his/her family, the Union, and the company to provide the troubled employee assistance in dealing with such problems.

An instrument to accomplish this is the Employee Assistance Program (EAP). In general, EAPs are designed for employees and dependents who have personal problems which may affect the employee's job performance. While there may be some differences from one company to another, all EAPs affiliated with District Lodge 142 are voluntary, confidential, professional services which provide evaluations, assessments and referrals, through appropriate resources, for treatment and follow-up care.

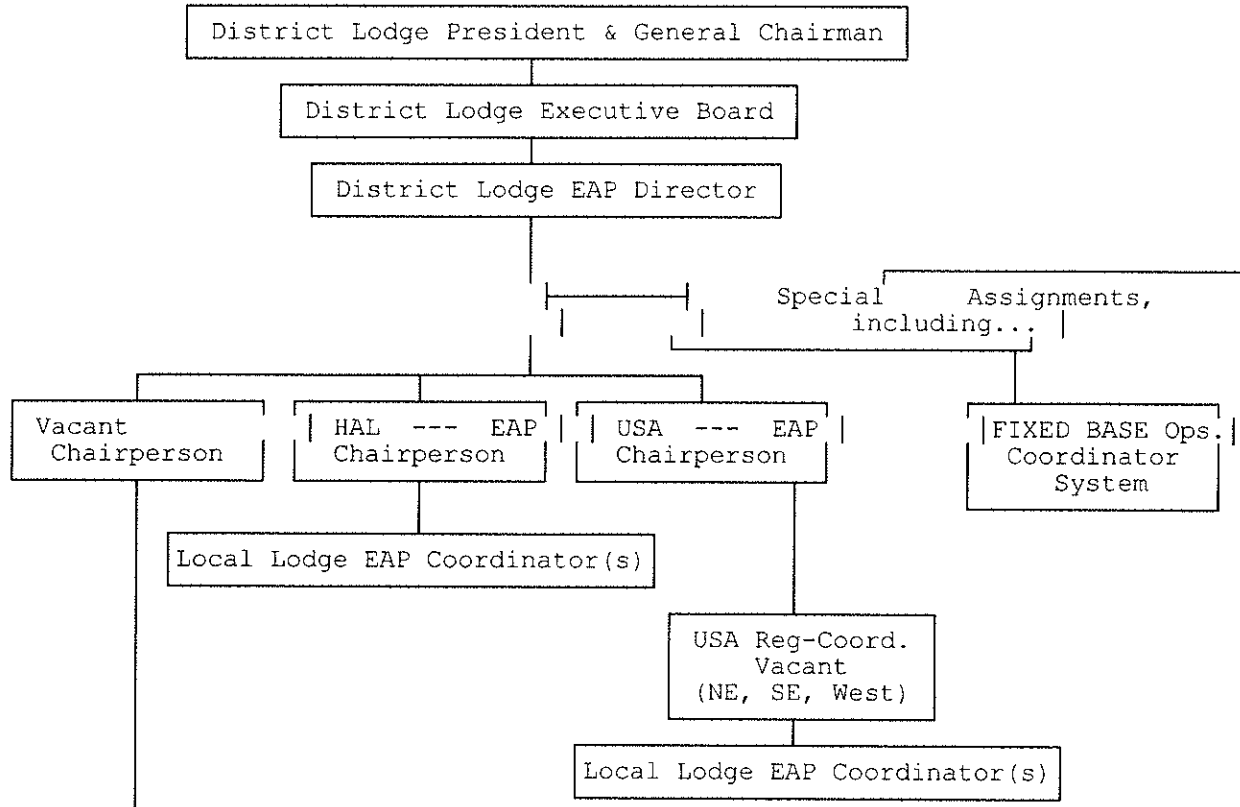
GOAL:

To create a standardized manual to be used for orientation and training of Employee Assistance Program Union Coordinators. This document will describe the roles of the Director of the Union Employee Assistance Program, Chairpersons, Regional Coordinators,

and the Local Coordinators.

In view of the changing times: alcohol and drug testing, insurance companies looking for more cost effectiveness, and more dependents becoming clients, we will be faced with different needs and consequences. The manual will be a valuable document because of the standard guidelines and consistent information it will provide to coordinators at all levels.

**DISTRICT LODGE 142
 EMPLOYEE ASSISTANCE PROGRAM
 ORGANIZATIONAL CHART**



ROLES AND RESPONSIBILITIES

Management:

Supervisors have the responsibility to monitor work performance and document problems as well as success. Documented work performance decline is invaluable when confronting employee "denial" and attempting to demonstrate to a recalcitrant person the consequences of their actions noted in their work records.

Based on job performance and workplace rules management issues discipline and takes action. To avoid the specter of a witch hunt the supervisor must be consistent in progressive discipline based on work records and avoid acting on innuendo or anecdotal circumstance. When routine management techniques fail to correct declining performance standards, the supervisor should consult with EAP representatives and recommend to the employee that s/he speak with EAP personnel as well.

Union:

The Union has a fiduciary obligation to fairly represent every employee. That obligation arises from federal labor law and includes the negotiation with the employer of terms and conditions of employment and representation of employees who have been disciplined by management.

When an employee is disciplined, the union's ability to help that

individual depends on many things including terms of the collective bargaining agreement, past practices at workplaces, the employee's work history and at times standards set by federal law such as the Americans with Disability Act.

The criteria used by union representatives in determining how to assist an employee who has been disciplined may be completely different than criteria used by EAP representatives in determining how to assist that individual in the EAP. EAP is always a separate and distinct policy from the grievance procedure as is the EAP Coordinator's function. EAP Coordinators should take care not to confuse their duties with that of union representatives whose obligations are quite different and whose criteria for action may also be quite different.

Union Employee Assistance Program Coordinator:

After any discipline is discussed and/or issued, and at every step of the discipline process, the possibility for offering EAP should be considered. The coordinator, supervisor and shop steward should review the employee's work record and any other contemporary work evidentiary circumstances compiled by the supervisor. If the document(s) suggest that routine management techniques have not, or are not going to correct the declining work performance problem, then a call to the Union/Company EAP Representative should be made for further consultation and guidance.

It is always worth repeating that EAP is not a trade off or a

consequence of the disciplinary process and is a separate and distinct policy.

Employee:

The employee must understand that the employee is responsible for their individual work record (i.e., production, attendance) and the consequences of their actions/decisions. When made aware that they are in trouble or have a possible problem, the employee has the sole responsibility of acting on the matter. It is the employee's choice as to the course of action to take and it must be made clear to the employee the possible outcome of their choice.

CHAPTER I

EMPLOYEE ASSISTANCE PROGRAM DIRECTOR AND COORDINATOR

The following chapter deals with coordinator qualifications and the respective job descriptions of all coordinator levels. These qualifications and job descriptions were developed from past coordinator questionnaires, consultation with union officials and members of management. The researching of past union and company documents also contributed to this effort. These qualifications and job descriptions are a union document and are, for the most part, acceptable to the companies our coordinators are affiliated with.

Because of the importance of the coordinator position, a process has been established to select union members to this position. This procedure is outlined in this chapter. In addition to the job description and qualification there are sections on: the application, the application process and the official appointment to a union employee assistance program coordinator.

**INTERNATIONAL ASSOCIATION OF MACHINISTS
AND AEROSPACE WORKERS**

**DISTRICT LODGE 142 EMPLOYEE ASSISTANCE PROGRAM
COORDINATOR QUALIFICATIONS**

1. ATTITUDE TOWARD PEOPLE

The successful candidate will have a realistic view of IAM members as human beings along with a healthy respect for their position as responsible and necessary parts of the overall company function. Extreme views, pro or con, are to be avoided. The candidate must not carry biases based on age, race, religion, national origin, gender or sexual orientation.

2. ATTITUDE TOWARD PERSONAL PROBLEMS

The successful candidate believes in the empowerment of the individual and can distinguish that from rescuing. The candidate realizes that perfection and irresponsibility are the extreme ends of a spectrum and therefore does not expect perfection or condone irresponsibility. The candidate does not attribute personal problems, such as addictions, to low morals or weak character. The candidate accepts people as they are without judging them. The candidate realizes that all people have problems, sometimes of their own making and sometimes not. The candidate recognizes that regardless of cause or severity, the individual ultimately has the responsibility and inner resources to resolve his/her own problems. The candidate appreciates that it is a privilege and

honor to accompany someone on the road to recovery, but the coordinator does not bear the responsibility for making recovery happen in another individual.

3. ATTITUDE TOWARD THE MACHINISTS UNION/COMPANY

This position requires someone who recognizes that both the union and company have legitimate prerogatives. Certainly the IAM coordinator should be supportive of the union, and the management coordinator supportive of management or they will lose credibility with their constituency. They should not be unreasonable in their views. The candidate must be able to cooperate with both union and management.

4. PERSONAL RECOVERY

Recovering chemically dependent candidates should have at least two years of continuous sobriety and be working a good program of recovery. Recovery from other personal problems, if severe or chronic, should be characterized by two years of remission and stability. Under special circumstances, exception may be granted.

A candidate's recovery can be an asset or a liability, depending upon the role model they personally project.

5. WORK RECORD

The candidate must have a good work record and be regarded as above average in their job or their credibility and relationships with Employee Assistance Program clients, management, union,

treatment providers, and fellow-workers will suffer. The applicant should not have had any job related problems during the past three years.

6. MOTIVATION FOR WANTING A COORDINATOR POSITION

The only valid reason for seeking the coordinator position is because of a primary interest in helping others. Those with other motives should not apply.

This is not a collateral assignment¹ and should not be treated as such. This is not an assigned position. Candidates make application and are screened. The applicant must be willing to invest his/her own personal time fulfilling the requirements of this position. This position is not to be filled for political purposes, nor should it be regarded as a reward for personal or professional achievement in areas unrelated to the Employee Assistance Program. The position of Union Employee Assistance Coordinator is appointed by the President and General Chairman of District Lodge 142.

7. CONFIDENTIALITY

Client confidentiality is a hallmark of this program. No one who has a reputation for carrying gossip or carelessly discussing other employees' personal business should be considered for this

¹Reference Appendix D letter dated August 5, 1993

position.

8. INTERPERSONAL SKILLS

Strong communication skills are an important asset to the Employee Assistance Program Coordinator. The candidate for this position is not required to be an expert in problem resolution. However, they should be the type of person toward whom others gravitate and with whom other employees feel comfortable and confident in sharing problems. The candidate must be a critical and supportive listener and be able to interact in an intelligent and reasonable capacity with the Employee Assistance Representative, the Machinists Union, and management. The candidate must be willing to learn the organizational structure and procedures of both the Machinists Union and the Company.

9. PERSONAL CHARACTERISTICS

Honesty: The candidate must be reliable, fair, straightforward, and free from deception. The candidate must be able to communicate accurately.

Maturity: The candidate must exercise good judgement, be capable of dealing with others on an adult level, and be able to look at situations from various points of view.

Assertiveness: The candidate must be able to positively, clearly, and accurately express his or herself without being overly aggressive or offensive.

Compassion: The candidate must have empathy for the distress of others.

Morality: The candidate must maintain standards which reflect well on the Employee Assistance Program, the union, and the company.

**JOB DESCRIPTION
DIRECTOR
EMPLOYEE ASSISTANCE PROGRAM
DISTRICT LODGE 142--MACHINISTS UNION**

The Director of the District Lodge 142 Employee Assistance Program will be a person who has progressed through the ranks of Local Coordinator, and District Lodge 142 EAP Chairperson (DEC). This person will have already demonstrated that he/she possesses the qualification and skills described for the Coordinator, and DEC.

This person will have a thorough knowledge of District Lodge 142 policies and procedures. The role of Director requires political awareness and strong communication skills. The position requires the person to be knowledgeable of trade unionism. This individual must be able to represent District Lodge 142 in dealing with the many companies that have employees represented by District Lodge 142. Also, the ability to represent the Employee Assistance Program in the public sector is required.

The Director should stay informed about any pending legislation which might affect union employees or the Employee Assistance Program. The Director should be able to make recommendations to the President and Executive Board of District Lodge 142 regarding the impact of proposed or current legislation.

This individual will be the mediating authority in resolving EAP issues with the Local and Regional Coordinators, DEC and, on the union side, with the various companies involved. Any unresolved EAP matters will be referred to the President and General Chairman of District Lodge 142 for final resolution. The Director makes the final decision as to who should be recommended to the President of District Lodge 142 for appointment and reappointment as a union coordinator.

This person must be able to communicate effectively, both verbally and in writing, with union officers and members of management at the respective companies that have represented employees.

As requested by the President and General Chairman of District Lodge 142, the Director must be able to compile reports on EAP activities at the various companies and present them either verbally or in written form to the President of District Lodge 141, the District Lodge 142 Executive Board, delegates to the Annual District Convention, and local lodges.

This position requires overseeing EAP Special Assignments (i.e., Education Committee), activities, planning and supervising the Annual District Lodge 142 Employee Assistance Program Conference and supporting the coordinator system.

**JOB DESCRIPTION
CHAIRPERSON
EMPLOYEE ASSISTANCE PROGRAM
DISTRICT LODGE 142--MACHINISTS UNION**

The District Lodge 142 EAP Chairperson (DEC) will be a person who has progressed through the ranks of Local Coordinator and Regional Coordinator. This person will have already demonstrated that he/she possesses the qualifications and skills described for the Coordinator and Regional Coordinator.

This person will have a thorough knowledge of District Lodge 142 policies and procedures. The role of DEC requires strong communication skills. This individual must be able to represent District Lodge 142 in dealing with their respective company. And, the ability to represent the Employee Assistance Program in the public sector is also required.

The DEC should stay informed about any pending legislation which might affect union employees or the Employee Assistance Program. The DEC should be able to make recommendations to the District Director, the President and Executive Board of District Lodge 141 regarding the impact of proposed or current legislation.

The DEC will make recommendations to the District Director for pending appointees and reappointment of Union Coordinator(s).

As requested by the District Director, the DEC must be able to compile reports on EAP activities at their company and present them either verbally or in written form to the District Director, President of District Lodge 142, the District Lodge 142 Executive Board, delegates to the Annual District Lodge 142 Convention, and or their Local Lodge.

This position may require overseeing EAP Special Assignments at the direction of the District Director.

Duties and Responsibilities:

- ** Promotion of and Co-Administration of a joint Employee Assistance Program (EAP).

- ** Participate in EAP policy development and implementation.

- ** Participate in the selection, visit, and review of all treatment providers.

- ** Maintain a current list of medical/treatment resources.

- ** Meet with upper level union and company management to advocate and further the purposes of the EAP.

** Select, interview, evaluate and maintain contact with all Local Lodge EAP Coordinators.

**JOB DESCRIPTION
REGIONAL COORDINATOR
EMPLOYEE ASSISTANCE PROGRAM
DISTRICT LODGE 142--MACHINISTS UNION**

In addition to the duties of a Local Coordinator, the Regional Coordinator accepts the following responsibility:

1. Participates in teams composed of persons from management, union, or other departments which assist the employee and develop appropriate follow-up plan to insure continuity of care including adequate individualized after care.
2. Provide supervision to volunteer coordinators who provide peer support and follow-up duties.
3. Insures time off the job for these duties is appropriate for each situation and coordinates time off with coordinator's supervisor or manager.
4. Supports team development with local union Employee Assistance Program Coordinators.
5. Follows confidentiality guidelines established by professional ethics, and as required by law.

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6. Provides consultation on labor relations issues affecting the membership.
7. Interviews, selects, and evaluates Local Lodge Machinists Union Coordinator applicants.
8. Visits and evaluates treatment and referral sources.
9. Prepares training programs for coordinators and shop stewards in their assigned regions.
10. Approves all activities of local lodge coordinators.

**JOB DESCRIPTION
LOCAL LODGE COORDINATOR
EMPLOYEE ASSISTANCE PROGRAM
DISTRICT LODGE 142--MACHINISTS UNION**

Coordinators in the International Association of Machinists and Aerospace Workers, District Lodge 142 Employee Assistance Program represents all Machinists Union represented employees. Coordinators function as part of an EAP team which may consist of any or all of the following: Company Employee Assistance Representative, Regional Coordinator, employee, employee's supervisor, treatment provider, union representative, and medical personnel.

1. The Coordinator advocates for the use of the Employee Assistance Program by providing information to employees, their families, supervisors, and union representatives as requested.
2. The Coordinator may assist qualified professionals in the gathering of pertinent data relating to the employee's social, mental, emotional, and physical history.
3. The Coordinator provides support and encourages the employee to accept and follow through on Employee Assistance Program recommendations.

4. The Coordinator may assist in the evaluation of referral resources through interviews, surveys of treatment providers, and site visits to ensure a high quality of care for union members.
5. The Coordinator may assist qualified professionals in the development of individual treatment plans which may include primary care as well as aftercare.
6. The Coordinator may assist in the training of other employees on human service issues.
7. The Coordinator will protect the confidentiality of the employee to the fullest extent permitted by law.
8. The Coordinator will support the employee in the return to work process.

CHAPTER II

THE COORDINATOR APPLICATION

The job of a coordinator, for the most part is not very glorious. In fact it's just the opposite. The coordinator deals with the exceptions vs the norms. The coordinator job is for the most part thankless and filled with many disappointments. However, there are opportunities for personal fulfillment. Watching a person that you had involvement with get well gives one an inner feeling of quiet satisfaction. The coordinator is expected to give of his/her time without expecting time off in return. Consequently, those looking for time off, glory, or other perks need not apply.

In this chapter, "Becoming a Coordinator," will address the responsibilities that a coordinator accepts and again touches on certain foundations that a coordinator should possess. It is the intention to stress that the coordinator role is not to be taken lightly. As a coordinator, you will encounter certain circumstances that will be of a very delicate nature; therefore you will need these guidelines. This direction is not to spread fear or intimidate, but to try and present a consistent and realistic view of what one can expect as a coordinator.

BECOMING A COORDINATOR

When a person becomes a Coordinator, he/she is accepting a position that requires responsibility, dedication, and unselfishness. Simply put, a "Coordinator" coordinates. To elaborate, a Coordinator is someone involved in helping a fellow employee find the courage to make a decision to seek and accept help. It means directing that person to the appropriate qualified professional resource in a way that is both responsible and respectful.

No two situations are identical. There are, however, some general guidelines which, when combined with good judgement, will go a long way toward assisting you in carrying out the coordinator role. Certain subjects appear in more than one place and in different contexts in this manual. If you think there is redundancy, you are correct. Repetition is fundamental to learning. The Employee Assistance Program deals in human lives. Vulnerable people entrust us with their most intimate problems. It is the EAP coordinator's duty to honor that trust. Some things are worth repeating.

It is expected that you as a coordinator review the entire contents of this manual on an annual basis in order to remind yourself of your duties, the qualifications that you brought to the EAP, the limitations and advantages of this position. To give

yourself a renewed opportunity to reflect on the motives that caused you to aspire to this position and consider how they may have changed over time, to evaluate your growth, renew and/or revise your goals.

Just as no two situations are alike, neither are there two human beings alike. Each of us has a unique personality; each of us has varying fears, desires, wants, and needs. We do not all hold the same values. These differences dictate, to a great degree, how we live our lives, how we see the world, and how we wish to impact it. It is easy for any one of us to instantly decide what the remedy should be for almost any situation someone else is facing.

This is human nature. However, none of us has the right to decide how another person "should" live. Not one of us has the right to make a decision about another life--unless a life is in danger. We need to be constantly on guard and defend ourselves against the most common tendency of all--judging the way another person chooses to live their life. It is, after all is said and done, their life. Our role is to provide support.

For many employees, the Coordinator is the first point of contact with EAP. It is up to the Coordinator to ensure a positive response. Some will approach tentatively--perhaps just looking for a little information. Some will be in crisis. Some will follow through on recommendations. Some will not. Ultimately,

the decision is theirs. We may be able to offer options and/or direction, but we cannot walk in their shoes. We cannot, and should not attempt to, rescue anyone from the consequences of their own choices. Like repetition, consequences are also fundamental to learning.

COORDINATOR APPOINTMENTS

Coordinators will be appointed to a 2 year term. The appointments will be staggered based on date of initial appointment or in the case of "grandfathered" coordinators date of last re-appointment.

Re-appointment will be based on a number of considerations one of which is: Does the Coordinator continue to meet the standards of a Coordinator? This includes continuing to bring to the program all the necessary qualifications, adhering to the role, function, and responsibilities of the coordinator, and, continuing to display the required personal and moral background necessary for the position of a coordinator. The coordinator is a role model.

It is absolutely vital for the Coordinator to keep EAP functions and the discipline system separate, and remain non-active in company and union politics!

Coordinators, of course, will be encouraged to resign if they feel they are no longer effective or are unable to bring the needed dedication to this program. A resignation will be viewed as a positive measure, as will a request to temporarily remove oneself from coordinator involvement. This demonstrates a true commitment to the helping field.

IAM/EAP COORDINATOR SELECTION PROCESS

Applications can be obtained through the DEC, Regional Coordinators or from the office of the Director of the District Lodge 141 Employee Assistance Program.

1. Applicant completes application.
2. Application is forwarded to DEC and Regional IAM/EAP for review.
3. Application is forwarded to Director District Lodge 142 IAM/EAP.
4. Applicant is interviewed by Director District Lodge 142 EAP or his designee.
5. Applicant offered position of temporary IAM/EAP Coordinator or denied based on application, interview, or needs of the particular location where the applicant is domiciled.
6. After successful completion of an introduction and training period the applicant is appointed to position of IAM/EAP Coordinator by the President and General Chairman District Lodge 142 IAMAW.

**APPLICATION
EMPLOYEE ASSISTANCE PROGRAM COORDINATOR**

NAME _____ EMPLOYER _____ L.L. _____

HOME ADDRESS _____

CITY _____ STATE _____ ZIP _____

HOME PHONE (_____) _____

WORK PHONE (_____) _____

JOB TITLE _____ COMPANY/MAIL CODE _____ / _____

COMPANY MANAGER _____

MGR. PHONE _____

FOREMAN/SUPERVISOR _____

SPVR. PHONE _____

SENIORITY _____ SHIFT _____

Please complete the following section to provide us with some background on yourself.

Have you ever served as a volunteer? Yes _____ No _____

If yes, please list organizations and type of work.

Why are you interested in being an EAP Coordinator?

What interests do you have that would aid you in being a Coordinator?

What training or education have you had that might be useful as a Coordinator?

What skills and qualities do you possess that would be helpful in a Coordinator role?

SIGNATURE _____ DATE _____

TO BE COMPLETED BY LOCAL LODGE:

LOCAL LODGE _____ recommends this applicant.

LOCAL LODGE _____ does not recommend this applicant.

Signature of Recording Secretary Date

REGIONAL COORDINATOR OBSERVATIONS:

CHAPTER III
INTRODUCTION TO HOW A JOINT EMPLOYEE ASSISTANCE
PROGRAM MAY FUNCTION WITH EMPHASIS ON MAJOR
COMPONENTS

PURPOSE AND OBJECTIVES

The goal of employee assistance programs is to address issues, problems, and/or conditions which may interfere with an employee's health or work performance. Generally speaking, the services offered to the employee are also available to his/her family members. Such problems may relate to substance abuse, financial difficulties, parenting, or a variety of other personal matters.

All situations do not require the intervention of the employee assistance coordinator. Frequently, they are handled independently by the employee with little or no effect to health or job performance. Other times, supervisory or union coordinator input may be successful in motivating the employee to seek assistance or resolve the problem on his/her own.

In any case, when a circumstance persists that contributes to attendance, productivity, or other types of unsatisfactory performance, it is to the advantage of all concerned parties, eg., employee and/or family, company, and union to utilize the services of the employee assistance program. It is believed, based on years of experience, that most problems are capable of being resolved. Attempting to avoid facing serious problems may lead to

extreme consequences, such as loss of employment or perhaps even death.

HOW IT WORKS

Problems are a normal part of life. The majority of problems are handled by individuals without outside assistance or intervention.

However, when job performance or the personal well being of the employee and/or family are jeopardized, it is appropriate for the employee or family member to voluntarily contact the employee assistance program for a confidential assessment and referral to the proper resources. This is very important: It is the employee's and/or family member's responsibility to pursue the referral.

In cases where an employee's attendance or job performance has declined or in some way continues to be unsatisfactory, it will eventually come to the attention of management. It is the supervisor's responsibility to consider that a personal problem may be the root cause of the problem and make the employee aware of the services offered by the employee assistance program. If the supervisor has cause to believe that a personal situation may be contributing to the performance or attendance problem, the supervisor's responsibility is to encourage the employee to engage in an objective, confidential interview with the employee assistance representative at his/her location. The employee assistance representative, with the aid of the employee, will

rev 1/96

determine what needs to occur to correct the situation and the employee assistance representative will provide referral resources appropriate to the situation. The responsibility for following through on the referral lies directly with the employee. It is imperative to assure the employee of the confidential nature of the program and that no information will be disbursed to anyone without his/her personal written consent, except in cases of potential self-harm or harm to others, child abuse situations or as otherwise required by law. This consent, once given, can be retracted at any time the employee chooses.

The employee should also be advised that his employment will not be compromised by usage of the employee assistance program. Neither should the employee expect that by simply talking with the employee assistance representative, or even resolutely following the recommendations of the employee assistance representative, that any disciplinary action already in progress will be made void.

The employee assistance program is a tool provided and supported by the company and union to aid in the resolution of personal problems and thus improve the employee's attendance and/or performance. It is not related in any way to the disciplinary process as defined in the union contract. There is no crossover between the two, they are separate and distinct. Therefore it is not reasonable to anticipate special consideration on the

company's part for using the program. However, in line with the applicable benefit package, time off may be granted for treatment or rehabilitation if needed.

BACKGROUND

The Joint Employee Assistance Program resulted from a mutual concern on the part of the company and union that personal problems of employees and their family members were impinging on the employee's ability to perform to their maximum potential. It was also observed that some problems went beyond the scope of the immediate workplace and were severely affecting the quality of life for employees and their families.

In forming and operating this program it has been the hope of company and union alike that employees and their family members will seek out the expertise of the employee assistance professionals prior to the point where disciplinary action becomes necessary or personal problems result in extreme consequences.

PROTOCOL

First and foremost, all contact between the employee and the employee assistance program is voluntary and confidential. At any time the employee or family member are impacted by a situation they are uncertain how to handle and believe they would benefit from consultation with a professional, they are strongly encouraged to make an appointment with an employee assistance program professional. The employee or family member may enlist the help of his/her supervisor or union representative to accomplish this if he/she wishes.

If attendance problems, job performance, or other adverse conditions exist which impact the employee, his fellow workers, or the company in general, it is possible that a member of management or a union representative may suggest the utilization of professional assistance via the employee assistance program. It is always the responsibility of the employee to pursue this action.

Management plays an integral part in the employee assistance program. It is the responsibility of the supervisor and manager to ensure that the work assigned to an individual or team is carried out in a safe, timely, and effective manner. It is thus necessary to monitor the process and progress of the assignment. In so doing, the supervisor or manager is able to evaluate each individual's performance. If an employee is not performing at a level commensurate with the labor contract, is absent from the workplace, or otherwise presenting himself in a manner detrimental to the company or his fellow workers, the supervisor or manager may be prompted to discuss the matter with the employee.

If the discussion results in the disclosure of a personal problem, the supervisor should refer the employee to the employee assistance program. If the employee wishes, the supervisor may facilitate that action by making the appropriate contact on his behalf.

If the discussion does not result in a direct disclosure of a problem, but the supervisor or manager's perception is that a personal problem is contributing to the issue of job performance, etc., it is also appropriate to diplomatically suggest the employee seek the counsel of the employee assistance program.

The following parameters should be observed by management when dealing with an unacceptable work situation:

- ** Document in writing as specifically as possible the employee's attendance pattern, including tardiness.

- ** Document in writing as specifically as possible any infractions of work rules, especially those which could potentially lead to a safety hazard.

- ** Document in writing as specifically as possible any unusual, inappropriate behavior which might indicate that some type of problem may need to be explored.

- ** Document in writing as specifically as possible any job performance concerns, such as refusal to perform or underperforming.

- ** Pay attention to what this employee's fellow workers say about working with him/her. You may learn valuable

information that you have not observed personally. Take note of it, realizing that it is third party anecdotal information.

If there is some doubt as to whether a referral to the employee assistance program is appropriate, contact the program directly and allow them to help you determine whether a referral should be made. It is not the responsibility of management to diagnose an employee's problem or even to offer well-intentioned solutions.

With the above documentation in hand, the supervisor will initiate a performance review with the employee. After presenting the data to the employee, the supervisor will suggest he/she make an appointment with the employee assistance program. In order to facilitate follow through on the employee's part, with the employee's permission, and with him/her present, it may be helpful to make the telephone call and set up the appointment. Again, it is the employee's responsibility to heed the suggestion or not.

Coordinators are selected from both union and management. Their role is as follows:

- ** To foster the use of the program within the employee population and among family members;

- ** To education employees, family members, management, and

union representatives in regard to the purpose, functions, and services of the employee assistance program;

** To aid employees in the return to work process once they have been discharged from treatment or other rehabilitation or medical services by acting as liaison between the treatment experience and the workplace;

** To further support the employee's return to work process by maintaining ongoing contact, meanwhile encouraging the employee to put in place an appropriate support network;

** To assist in the development of coordinator training;

** To be proactively involved in ongoing personal learning experiences which will enhance his/her abilities, increasing the coordinator's opportunities to participate in a greater variety of roles;

** If requested by the employee assistance representative, to participate in evaluating treatment resources;

** To participate in employee assistance program coordinator meetings or other related meetings as requested by either the employee assistance representative or the

Director of the IAM EAP.

CHAPTER IV

CRISIS/EMERGENCY RESPONSE OVERVIEW

This next chapter provides information on a number of subjects that the coordinator will come in contact with as he/she pursues a calling as a helping person. It is extremely important that the coordinator understand the subjects presented here to the point where he/she can intelligently discuss them with peers, union representatives, and management. It is understandable that you as a coordinator will not be an expert on all of the topics and their surrounding circumstances presented in this chapter or for that matter in this manual, but you are expected to utilize the resources within the union/company system to find answers when needed.

A point that needs clarifying is that you are not expected to guess when confronted with an unusual situation, but to research the subject so as to be able to provide accurate information. It is to be noted that the information provided on the following subjects is intended to give an overview on each issue. As with most fields, the field of human services is constantly changing. Therefore, it is expected that as a coordinator you will strive to stay updated on pertinent subjects.

EMERGENCIES

Coordinators do not have the training or qualifications to make decisions involving suicide, potential harm to self or others or any number of situations where grave consequences could result. In instances where you as a coordinator cannot contact an EAP Representative, your Regional coordinator, or the Union Director and you have concern regarding a person's welfare, then, the coordinator is advised to call for emergency help (i.e., 911, local police, fire or ambulance emergency number) and have the person taken to the nearest hospital emergency room and have qualified personnel make a determination as to what should be done.

The possibility of an emergency always exists, therefore, Coordinators should compile a coordinator-phone-number support system phone list. Much like the recovering individual's support system phone list, when trouble arises you don't want to fumble and hunt for help. Have a support system in place and available that you know is able to help when the call comes. Suggested potential sources are listed below. Add the phone numbers or make your own list, whatever will work for your respective location.

Example Resource List On The Next Page.

Resource List:

Clergy.

Crisis Centers:

Abuse

Rape

Suicide

Others...

EAP Professional.

Employer:

800 numbers

HMO Crisis Numbers

Other Emergency Hotlines

(check applicable benefit package)

Local Public Safety Services:

Ambulance

Fire

Police

911, if available

Hospital Emergency Rooms.

Mental Health Professionals.

Outpatient Clinics.

United Way HELP Hot Lines.

** IF YOUR COMPANY HAS AN ESTABLISHED CRISIS HOTLINE, ALWAYS USE THIS RESOURCE FIRST! REVIEW YOUR RESPECTIVE COMPANY POLICY.

SUICIDE

The following short discussion borders on being clinical which is NOT OUR INTENT. This information is only provided as background information for the peer coordinators. The coordinator is not to try and diagnose or determine the problem, it's cause, or the degree of severity.

THE COORDINATOR'S TASK IS TO RECOGNIZE AND IDENTIFY THE POTENTIAL FOR HARM TO "SELF OR OTHERS" AND FOLLOW THROUGH BY CONTACTING HELP:

IMMEDIATELY!

SUICIDE: The Danger Signs

- Suicide Threat/Similar Statement
- Previous Suicide Attempt
- Has A Plan
- Final Arrangements

WHAT TO DO: Talk freely -- Open lines of communications, ask questions, talk calmly, don't be judgmental.

GET HELP: Call a suicide prevention center, crisis intervention center, mental health clinic, physician, qualified mental health

professional, hospital emergency room, outpatient clinic, or clergyman.

This person, by talking about his feelings, has opened lines of communications that may not easily be opened again. Take advantage of it by asking questions and talking clearly and calmly about the situation. Have you thought about how you would end your life? Have you made a plan? Have you acquired the means?

YOUR WILLINGNESS TO TALK THIS WAY CAN BE A BIG RELIEF TO THIS PERSON, WHO PROBABLY FEARED THAT YOU WOULD BE JUDGMENTAL OR WOULD TRY TO CUT OFF COMMUNICATION AND LEAVE HIM. YOUR ACCEPTANCE MAY GIVE THE PERSON HOPE AT A TIME WHEN HOPE IS EXACTLY WHAT HE/SHE NEEDS.

GET HELP: No matter what else you do, or what your discussion leads to, or how much the person denies his intention to commit suicide or tries to assure you that he wouldn't really go through with it, make sure he/she gets professional help. When the signs of suicide are there, a professional is needed. The information you have gathered by talking with the person will help the suicide prevention worker deal with the situation and suggest a specific course of action.

...excerpt from The American Association of Suicidology

If you don't know this person's location ask him/her where they are. If he or she won't go for help, get help to them. Consider the following:

If you cannot keep them on the line any longer or get them to agree to get help, make a verbal contract with them. Have this person agree and promise they won't do anything until a certain time, at which time you and they will talk. Remember, they called you. Therefore, they must trust you. Use this to your advantage to help them. If the conversation ends, you will have to decide then if the situation is serious enough to contact the authorities. Don't assume that because the plan doesn't seem real that the threat of suicide isn't real. A professional must decide. A suicide attempt, no matter how harmless or frivolous it seems, should never be dismissed as insignificant. If a person's feelings are deep enough for them to talk about suicide, there is no doubt about it, they should be taken seriously.

To prepare yourself for something like this it is strongly suggested that you contact the local suicide hotline or a local mental health agency for additional information on dealing with this type of call. Once you have obtained this information, insert it in your manual.

** IF YOUR COMPANY HAS AN ESTABLISHED CRISIS HOTLINE, ALWAYS
USE THIS RESOURCE FIRST! REVIEW YOUR RESPECTIVE COMPANY
POLICY.

CHAPTER V

POST TREATMENT ISSUES

This chapter deals with an important support function a coordinator will likely be involved with, AFTERCARE!

After initial treatment, the real work of recovery begins. Aftercare is an essential ingredient in continued recovery from any serious dependency problem, physical or psychological. Fitting hand in hand with aftercare is the ever present danger of relapse. This chapter will present some information and ideas on both aftercare and relapse and how this applies to the coordinator. This information is provided as a tool to help guide the coordinator with his/her role in the follow-up process.

Also included are short discussions on the disease concept, enabling, co-dependency, denial, addiction, and relapse.

EMPLOYEE ASSISTANCE PROGRAM
POST TREATMENT METHODOLOGY
(job performance based referral)

The premise for the Employee Assistance Program is to provide a therapeutic and remedial function, whereby, a troubled or ill employee, having personal or job performance problems, could refer themselves, or be referred via supervisor/union action to the EAP, for evaluation. The objective is to help the employee regain health and job efficiency.

In most cases an employee has been living a dysfunctional lifestyle; coping mechanisms and responses to stress have been inappropriate. Many inappropriate techniques to resolve the stressor have been tried (i.e., use of a substance and other "quick-fix" remedies) and the only outcome has been a long term worsening of the employee's health, well being and declining job performance.

Once an employee has been through primary treatment (physiologic or psychological) a long period of recovery begins. Hopefully this initial phase of treatment accomplished the following: intervention on denial, halted the progression of the disease, began educating the employee about his/her particular problem, and developed an individualized aftercare plan, part of which was relapse awareness, AA meetings and other support group(s). Additional counseling may also have been prescribed. Upon discharge and return to work, the employee is now faced with a very difficult period in his/her life. He/She is out of the

protective environment of the treating facility and away from "safe" people, places and things. Now the employee is back into the dysfunctional environment where he/she got into trouble in the first place. Old behaviors of isolation, tiredness, poor diet, etcetera could very well be triggered. These factors could trigger a relapse.

The EAP, if involved with the client via the proper releases, can play a very important supportive role. The EAP and/or Coordinator can make frequent contact with the employee and stress the absolute fact that they must comply with prescribed aftercare recommendations. The Coordinator should demonstrate a genuine concern and caring during this time of lifestyle transition. For the recovery plan to work it must be realistic, supportive and positive.

The positive supportive recovery processes all do one thing: provide a safe environment by making available a support system the employee can turn to when things get confusing or out of hand. The support system will help inculcate new lifestyle behaviors and responsible coping strategies which are healthy. Just as it took many years to develop their individual problem, it will take a long time to modify their behavior. In most cases this will be a one-day-at-a-time life long process.

Even the best efforts of a Coordinator cannot assure the employee will return to acceptable job performance. Even though the

Coordinator has this obvious limitation and constraint, the Coordinator still fulfills a vital function. That is, to assist a member in seeking and accepting an EAP recommendation, and furthermore, the Coordinator can be extremely instrumental in providing support to the member's aftercare plan.

The coordinator must not get pulled into the diagnosing/counseling game, but they do want to convey a genuine caring and concern for their recovery, let them know they are not alone in this struggle and that they will make it. This workplace support technique can help ease the feeling of "I'm alone and no one gives a damn". The employee must learn to reach out and ask for help, something they have not done, or done well in the past.

Just because an employee has been diagnosed with a disease, doesn't relieve him/her of the responsibility to take care of themselves. The disease isn't a justification for abnormal behavior/performance, but to the contrary, the diagnosis of a disease is the basis for responsible corrective action.

It is the employee's responsibility to accept help. If the employee chooses to ignore recommendations, or just can't, or won't comply, then the employee must accept the consequences of their decision.

DISEASE CONCEPT OF CHEMICAL DEPENDENCY

A disease is diagnosable, progressive, and can result in death if left untreated. A definition of alcoholism from NCADD and ASAM:

"Alcoholism is a primary, chronic disease with genetic, psychosocial and environmental factors influencing its development and manifestation. The disease is often progressive and fatal. It is characterized by continuous or periodic impaired control over drinking, preoccupation with the drug alcohol, use of alcohol despite adverse consequences and distortions in thinking, most notably denial."

Just as a person may or may not be responsible for his or her flu, pneumonia, etc., a person with a chemical or substance dependency is similarly situated. The person with the flu may or may not have exposed them self to an infected person(s). The diagnosis was manifested by symptoms which were diagnosable and progressive.

Similarly, a person with a chemical/substance dependency will experience symptoms. these symptoms will be diagnosable and if left untreated will result in insanity or death of the person. Generally, the disease exists on a continuum: experimentation, social use, abuse (problems appear: i.e., DUI, family, job, social), dependency (need "it" to function, get rid of shakes), and finally addiction (despite all negative consequences continues to use and pursue the use of the substance).

Addiction

not the amount or frequency of use but rather how the use affects you; if the activity is causing problems in your life and you keep doing it anyway (loss of control);

addiction is diagnosable, describable, and recognizable.

If the activity's purpose is as a mood-changer because your mood is intolerable, the activity is leading to addiction.

ENABLING

Reaching out to help those in need is a noble, natural, wonderful thing to be able to do for someone else. There are times in life when we probably would not have gotten through a situation without the help of someone who cared.

The problem begins when this 'helping' is not really "helpful", but over protective. This is called enabling; a negative situation for everyone involved. In the case of an alcoholic/addict, the following list mentions a few actions generally considered to be enabling:

Work Site Examples:

- ** Taking over the responsibilities of the alcoholic/addict.

- ** Another individual calling in sick for someone who is still drunk or hung-over.

- ** Hiding the alcohol or other substance being abused.

- ** Letting your own work slide because you rush to do the other guy's work to cover for him.

- ** Covering for the employee when he/she is not in their assigned work area.

Social Life Examples:

- ** Denying to the children that the parent is drunk or high.
- ** Making excuses why you can't attend certain functions because you can't count on the other person being sober.
- ** Not inviting people to your home for fear of them seeing your spouse or child drunk.
- ** Keeping the dinner warm so he/she can have a hot meal when they finally get home.
- ** Making sure everything is in good order when your spouse gets home so he doesn't create a drunken scene.
- ** Lying to creditors about your inability to keep your payments current.

CO-DEPENDENCY

A person or persons who enable on a continuous basis are called co-dependents. Their investment (though often unconscious) is to maintain the status quo. After all, the known is usually more comfortable than the unknown. Co-dependents are affected by the disease of alcoholism/addiction as much or more than the person abusing the drug. The difference is that the addict has a drug to dull their pain. The co-dependent generally does not--unless both parties are alcoholics/addicts.

The following article, called "RESUME OF A CO-DEPENDENT" is enclosed to provide a larger picture of what co-dependency is all about. It was written, tongue in cheek, by a practicing co-dependent who recognized all the ways she contributed to the dysfunction in her household. Later, she commented that she should have titled it "AUTOBIOGRAPHY OF A CO-DEPENDENT." It is used with her permission and with the hope that it will increase your understanding of the nature of co-dependency.

RESUME OF A CO-DEPENDENT

PERSONAL STATISTICS

Date of birth: Anytime
Marital status: Insignificant
Health: Hypertensive
Headaches
Sleep Disorder
Depression
Colitis
Backaches
Eating Disorder

AREAS OF PRIOR EXPERIENCE AND EXPERTISE

Management skills: Able to undertake the responsibilities of numerous other people, eg., spouse and children, allowing the outside world to be presented with a "respectable" family image, thereby maintaining the family secrets; willing to assume total personal responsibility for the actions and feelings of others; highly qualified at achieving goals that I set for other people.

Impression Management: Adept at making others see me as I want to be seen; able to ascertain other people's expectations of me and fulfill same.

Martyr: Successfully sought and received pity by convincing others of my great suffering and courage; able to bear up under the criticism and resentment of those who would misinterpret my resourceful problem solving skills as being manipulative and controlling.

Caretaker: Skillful at sustaining a self-effacing approach

to family life, with the needs of others always taking precedence over my own; adept at neglecting my own needs to the point where I am unable to diplomatically effect peace in difficult and chaotic situations; willing to trust the perceptions of others and deny my own experience.

Rationalize/Intellectualize: Proficient at plausible explanations and excuses for family disharmony; able to provide a well-practiced repertoire of self-critical, self-blaming statements designed to divert attention from inappropriate behavior; capable of maintaining hope in hopeless situations; gullible; willing to believe an unending litany of promises regardless of how often they have been broken in the past.

Projection: Posses an uncanny ability to predict negative outcomes to future events; have mastered the ability to create in myself the necessary feelings and behavior that prevent me from taking any risks.

Perfectionist: Compulsive follower of rules; diligent to extremes; careful to attend to the most minute details; rigid; not willing to accept any variations in plans or schedules; comfortable only with predictable people and situations.

Guilt: Specialize in inducing and experiencing guilt.

Integrity: Capable of subjugating feelings which might interfere with the appearance of the "perfect" family image; skillful liar, both to self and others, thereby protecting myself from unpleasant emotions and sparing others the inconvenience of being imposed upon.

Detective: Suspicious to a fault; willing to go to any lengths to seek out the "truth."

Anger: Capable of dealing with this feeling in a variety of ways, eg., displacement, sarcasm, and repression.

Isolation: Proficient at shutting myself off from friends and family; choose loneliness rather than allowing others to become aware of family difficulties, thereby effectively squelching any outside interference.

REFERENCES

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DENIAL AND WORK SITE CONFRONTATION/INTERVENTION

What is denial? It is a defense mechanism employed by those who, for one reason or another, need to blind themselves to a particular situation. It's an unconscious act that most of us have employed at one time or another in order not to face, or to delay facing something that was perhaps too difficult at the time or to get through an especially tough time. Perhaps it's been a matter of having the flu but knowing you have to go to work because you're working under a deadline. What do you do? You say to yourself, "I'm O.K. There's nothing really wrong with me. I'll feel better when I get some fresh air or food in my stomach or get into my project. I'm just a little tired. That's all."

This is different from lying because the person really believes that their own perception is the real truth. The facts that would indicate otherwise are blocked from their minds. The typical response to this dynamic is, "if it's going to hurt, I won't look. If I don't look, it'll go away." Only it doesn't usually work that way. To look at it squarely in the face means to acknowledge our own vulnerability and fear--not an easy thing to do for any of us.

For alcoholics/addicts it is particularly dangerous, even resulting in loss of life--the alcoholic's or maybe the victim of a drunk driver, or the victim of a drunk who thought he/she had a right to a particular bar stool and shot or stabbed someone to get

it.

One of the best techniques to use to break through denial and to intervene on the employee in the workplace is to document, document, and document some more, intervene early and offer the option of EAP at every step of the discipline process.

Review of the employee's work record by the coordinator, supervisor and shop steward will determine whether routine management techniques will correct the declining performance problem or if further consultation with the EAP for guidance and planning will be necessary. If in doubt of what action to take, consult with the EAP.

The facts about an employee's attendance, job performance, etcetera are undeniable. When faced with the facts, followed by the appropriate disciplinary action, the employee has a much more difficult time telling himself/herself it's not true. Consequences are eye-openers. They result directly from the employee's actions and force the employee to examine what's been happening in his/her life that has created this situation. Sometimes consequences create a crisis in an employee's life; a crisis is an opportune time for intervention. This is especially true if the employee is nearing a point where severe disciplinary action is a possible outcome. When an individual is feeling that matters are getting out of control, they will be more willing to grab at anything and seek the help they need. This is the time to

encourage/schedule an appointment for the individual with the EAP Representative.

WORK SITE CONFRONTATION/INTERVENTION

The EAP continually strives for early intervention on denial and points out that supervisors must accurately and completely document work records. The DOCUMENTED FACTS of job performance (production, attendance, behavior, etc.) when put in front of a person are "there". Facts can't be put off, they are real. The facts become more evident and real when discipline is progressively issued as a consequence. Facts can't be minimized, blame can't be shifted to others. Therefore, documented facts will bring these consequences to life and make them unrefutable.

We don't have to wait for the employee to "hit bottom" and "want" help. We can use positively our peer coercion and the duress of the disciplinary process to achieve a lifting of the "bottom" in an effort to achieve early intervention. The chances for lesser amounts of treatment with a successful outcome are many orders of magnitude greater than if the process waits until the employee finally falls apart and loses his/her job. Strive for early intervention with as much documentation as possible.

Early intervention on poor performance may not succeed the first time, but this will give routine management techniques an opportunity to correct the situation. At the same time EAP consultation, guidance and planning can begin for the use of more sophisticated techniques in subsequent intervention/confrontations in an effort to get the employee to face the reality of the

employee's declining performance problem. Early employee intervention around their work problem followed up in a progressive fashion, has a better chance of breaking through their wall of denial and getting them to accept the first step to help, the professional evaluation. Plan carefully.

EXPLAINING THE EAP

The following points are to be presented when explaining the joint IAM/EAP.

1. The program is confidential and voluntary.
 - A. Confidential- no one can talk about any case unless there is specific written authority by the client. Exception, child abuse or harm to self or others or court order.
 - B. Voluntary- The company should not issue discipline against an employee if they refuse to use the program. In the same vein, the company should not reduce any warranted discipline because of use of the program.
 - C. EAP and discipline are separate and distinct.
2. Review your particular company policy for applicability of coordinator functions in this area.

The IAM Coordinators role is to coordinate a person getting help. The Coordinator does this in several ways. One way is to explain what the EAP Representative does in an interview. Another is to explain that the providers that the employee

is referred to are known to the Union. They are selected for expertise in their particular field. Another is to explain the benefit of availing oneself to the program. One of these benefits are dealing with insurance. The IAM Coordinator can assist with coordination of insurance benefits (i.e., gatekeeper, HMO, national plan, or other contract). Depending on the employer, some coordinators may participate in other aspects of the referral treatment process.

3. The Company EAP Representative's role is to assess and refer. This person has had years of experience and is especially trained for this role. Many times a person will ask, "why do I need to talk to them when I have marital problem?" In response to this type of question you, as a coordinator might say, "Although the obvious problem may appear to be marital, there may be underlying problems contributing to the obvious problem." The coordinator might continue by telling the employee that, before any problem can be remedied it's cause must be known. Now at this point the client may offer the other problems or personal remedies. The Coordinator can counter by telling the client that this is exactly what he is talking about, that there can be a number of confusing issues. And that when a person is too close to something it is hard to be objective. And that the EAP representative, being impartial, is the logical person to assist in sorting out the facts. As this conversation continues the Coordinator can inject, when the opportunity is right, other

gentle persuasions/arguments that might convince the client to see the Representative. Possibly something like, "look if it will make you feel better or more comfortable I'll be happy to accompany you," or "so and so" (name of the rep) is a really gentle and caring person."

CONFERRING WITH THE EAP REPRESENTATIVE
REGARDING A NEW CLIENT

It is important to discuss the particulars of a new client that you refer to the Company EAP Representative prior to the client seeing the EAP Representative. Your input will make the job of the Representative much easier, faster, and more thorough. It is especially true with problems of chemical abuse because in these cases the client, more than likely, will not tell the complete truth (denial). The chemically dependent client will almost always omit some of the problems or consequences of his/her addiction. Examples might be: DUI's - how many?, His/her discipline status with the company, problems of family, financial, with the legal authorities, past marriage failures, etc.

You, as a Coordinator, can provide more accurate information in many instances. This information will be invaluable as part of an intervention strategy on the employee and/or their denial.

NON-JOB PERFORMANCE NON-EMPLOYEE REQUEST FOR HELP

Coordinator action is initiated by job performance problems. The EAP can not and does not directly get involved with non-job related concerns. The following guidelines are offered to assist you whenever a concerned individual calls on behalf of a "troubled-person":

1. Don't get directly involved and DO NOT contact the troubled person. ONLY if the situation is life threatening will you want to be directly involved, then follow the guidelines in CHAPTER IV, CRISIS/EMERGENCY RESPONSE.
2. Guide the caller and give options such as AA, NA, Al-Anon, Hotlines, etc. After all, "they" were concerned enough to call you in the first place. They should be willing to help the troubled person by talking and communicating with him/her.
3. With time most problems work themselves out. However, if it doesn't, the problem will surface in the job and the Coordinator will have supervisor documentation as an aid and tool.
4. The EAP is premised on job performance, ONLY.

FACILITIES CONTACTING YOU

If you are contacted by a treatment facility or a therapist regarding an employee you must insure that the facility gives the same information to the company EAP Representative. Following is a suggested method to accomplish this:

- ** Explain to the facility representative the nature and intent of the joint program and instruct them to call the Employee Assistance Representative.
- ** Follow-up on this by relaying the information from the facility to the EAP Representative.
- ** Communicate to the EAP Representative that the facility is supposed to call.
- ** Follow-up with the EAP Representative to confirm that in fact the facility did call.

As always, if you have any questions on this or any other procedure please contact me.

Paul M. Shultz
Director, District Lodge 142
Employee Assistance Program
Day-----704-357-0027
Evenings----704-907-3563

FACILITY/TREATMENT/DISCIPLINE

If a member enters treatment and is involved in discipline that could result in a hearing, the coordinator will explain to the client that the union may need to communicate with the treatment provider in order to properly represent him. Then, request the client to sign releases for the appropriate union representatives that may need to contact the facility regarding his/her case.

Furthermore, the coordinator will recommend that the client sign releases to allow aftercare or follow-up clinicians to communicate with union representatives. THE CLIENT SHOULD SIGN THESE RELEASES PRIOR TO DISCHARGE FROM TREATMENT. The purpose of this procedure is to save time and difficulty should it become necessary for the union to contact the treatment providers.

The treatment facility will be able to provide a "release of information form."

TEN COMMANDMENTS FOR EAP COORDINATORS

1. THOU SHALL UNDERSTAND AND RESPECT CONFIDENTIALITY.
2. THOU SHALL NOT DIAGNOSE.
3. THOU SHALL MAINTAIN GOOD RAPPORT AND COMMUNICATIONS WITH THE UNION, EMPLOYEE ASSISTANCE REPRESENTATIVE AND THE COMPANY.
4. THOU SHALL BE A PROBLEM SOLVER, NOT A PROBLEM MAKER.
5. THOU SHALL BE OPEN AND AVAILABLE TO ALL EMPLOYEES.
6. THOU SHALL PRESENT AN APPROACHABLE ATTITUDE AND HAVE RESPECT FOR THE CLIENT AT ALL TIMES.
7. THOU SHALL SHARE ANY ACQUIRED SKILLS AND KNOWLEDGE WITH YOUR COMMUNITY.
8. THOU SHALL NOT MAKE ASSUMPTIONS.
9. THOU SHALL CONTINUE TO UPDATE YOUR SKILLS.
10. THOU SHALL CONDUCT THYSELF WITH INTEGRITY.

Thomas Buzard
Chairman, District Lodge 141
EAP Education Committee

CHAPTER VI
RECORD KEEPING

Coordinators should only be keeping DEMOGRAPHIC records on employees and the necessary RELEASES OF INFORMATION required.

No Coordinator is to request or have personal medical or treatment information on file. Any information a Coordinator has may be subject to subpoena and may be used in an incriminating manner. This type of record keeping only results in an unreasonable risk to the EAP and the Union.

Our mission is to direct and coordinate employees to professional assessment and treatment. The professional process and medical data is out of the realm of the EAP. Only the demographics of an employee's treatment process is necessary to track, and this for purposes of coordination at the workplace to satisfy contractual obligations.

RELEASE(s) and demographic information which will be required for the Coordinator to function should be kept in a locked file. Don't keep demographic notes and releases in unlocked/unsecured environments.

Chapter VII

LEGAL CHALLENGES TO THE EAP²

The possibility exists that a Coordinator may be named in a legal action and be called upon to provide information concerning the Coordinators' case involvement. This may be a serious matter with potential negative impact on the credibility and effectiveness of the EAP, the employee and could subject the Union to liability.

In order to ensure that proper steps are taken to protect all of these important interests, please follow these rules:

1. Do not discuss any employee with any attorney until you have contacted the District EAP Director. In the event you are contacted by an attorney, you should report this to your EAP Chairperson or the EAP Director for instructions.
2. If you receive in the mail or by personal service any subpoena or summons, or any correspondence or other document to/from an attorney or court, contact your EAP Chairperson or Director immediately.

² Reference Appendix A.

APPENDIX--A

CONFIDENTIALITY

For the EAP to be effective it is essential that employees using the services of the EAP are confident that any information provided will be maintained in confidence.

Moreover, confidentiality is a principle supported by Federal and State laws and rules, codes of ethical standards, and certification and licensing boards.

To maintain this information in the most confidential manner possible you should follow the guidelines below:

1. If you are asked about an employee by a union representative, a management representative, or just an interested individual, explain that all information provided to the EAP regarding an employee is held in confidence and cannot be disclosed. Explain to them that if they want such information, they must obtain a release from the employee.

2. If you receive a subpoena, or any other legal document, requiring you to testify or produce evidence regarding a client or the EAP program, you should not comply with that subpoena until you have contacted the EAP Director.

3. If you receive a request for information from an attorney, you should not comply with the request even if the attorney states that he is the attorney for the employee. You must explain to the attorney that he must provide a release.

Again, contact the IAM EAP Director prior to any discussion with an attorney.

4. If a representative of the company requests information, you must not comply unless you/they have obtained a release.

5. If you believe that an individual presents a serious and real threat of imminent harm to himself or to another individual, the policy of the EAP is to disclose information which might otherwise be confidential which is necessary to protect the client or any other threatened individual. In such circumstances, if you have time, you should first consult with the EAP Director before making any such disclosure.

APPENDIX--B

AUTHORIZATION FOR RELEASE OF INFORMATION

SAMPLE SAMPLE SAMPLE

I, _____ do hereby consent to and authorize
_____ to disclose to: _____

_____ information from my _____ records relating to
my identity, diagnosis, or treatment. I understand that the specific type of information to be
disclosed includes: _____

_____ and the purpose and need for
this disclosure is to: _____.

I also understand that this consent is revocable to the extent that action had been taken in
reliance thereon, and that this consent will remain in force for a period of six (6) months
post discharge to effectuate the purpose for which this is given.

Dated this _____ day of _____, 20_____.

Client Signature: _____

Witnesses

Signature: _____

Signature: _____

APPENDIX--C

FEDERAL GOVERNMENT MANDATED WORKPLACE DRUG and ALCOHOL TESTING

Department of Transportation
Office of the Secretary
49 CFR PART 40

Procedures for Transportation Workplace
Drug Testing Programs

and

Department of Transportation
Federal Aviation Administration
14 CFR 61 et al.

Anti-Drug Program for Personnel
Engaged In Specified Aviation Activities
Final Rule

CONCERNING THE OFFERING OF REHABILITATION AFTER A POSITIVE TEST RESULT: MOST COMPANIES CHOSE THE TERMINATION OPTION. ONLY A FEW OFFER REHABILITATION. ONE CARRIER HAS DISCONTINUED THE REHABILITATION OPTION AND IS NOW TERMINATING EMPLOYEES TESTING POSITIVE.

TAKE THE TIME TO BECOME FAMILIAR WITH YOUR RESPECTIVE COMPANY'S RULES AND POLICIES AND PERIODICALLY REVIEW THEM.

As a coordinator you should be knowledgeable about drug testing. The following discussion is intended to accomplish this. Historically, the union and the companies have been opposed to drug testing. However, the Federal Government, specifically the Department of Transportation (DOT), felt there existed a need to have employees in the transportation industry who work in sensitive safety- and security related functions (covered-employees) tested for certain illegal drugs. These drugs are: Amphetamines, Phencyclidine, Opiates, Cocaine, Marijuana and their metabolites. DOT/FAA alcohol testing is coming next. Its implementation has been delayed for now. All the DOT/FAA has remaining is to promulgate the guidelines and procedures. These guidelines have not been issued at this time.

As a coordinator, you should have a general knowledge of the DOT/FAA process. This narrative will endeavor to accomplish that purpose.

The authority to test the above mentioned workers comes from the Office of the Secretary, DOT, per "Procedures for Transportation Workplace Drug Testing Programs", 49 CFR PART 40. The DOT issued the Final Rule and it became effective January 2, 1990.

The DOT rule is applicable to six (6) operating regulations therein; Federal Aviation Administration, Federal Highway Administration, Federal Railroad Administration, United States Coast Guard, Urban Mass Transportation Administration, and Research and Special Programs Administration. All programs follow closely Department of Health and Human Services Administration (DHHS)

regulation titled "Mandatory Guidelines for Federal Workplace Drug Testing Programs" (DHHS Guidelines).

From 49 CFR 40, "The DHHS Guidelines include procedures for collecting urine samples for drug testing, procedures for transmitting the samples to testing laboratories, testing procedures, procedures for evaluating test results, quality control measures applicable to the laboratories, record keeping and reporting requirements, and standards and procedures for DHHS certification of drug testing laboratories...." The DOT states further in the regulations that the rules "...are not static, and that we intend to keep up with the state of the art in testing procedures".

Incorporated in 49 CFR 40 are provisions for the individual operating regulations (FAA in our case) to establish regulations and guidelines for drug testing particular to the regulation. In our case, our respective carriers had to submit a drug testing plan to the FAA for approval. Among these individual company plans are stipulations of the testing process such as: program manager, time(s) of day, Medical Review Officer (MRO), groups of employees, numbers of employees, options of disposition of positive results (i.e., disciplinary matters). Once the FAA approves the plan it can then be implemented. The plan can be modified at any time upon application to and approval of the FAA. Periodically the FAA does drug testing audits of the carriers to monitor compliance with applicable DOT/FAA guidelines procedures.

The testing and collection procedures are forensic; they are admissible in a court of law. All of the law and guidelines have been challenged in the courts of labor and civil law up to and including the United States Supreme Court. They have been wholly upheld.

The procedures are strictly followed and any errors are grounds for negating the process and any result is then considered negative. In the beginning months of the testing program there were problems. But these were corrected by using new procedures and methods. There has not been any technical error contributing to a false positive report. All positives are, and have been, investigated per the 49 CFR 40 appeal procedures and to date no positive has been overturned because of chain of custody or laboratory errors; there haven't been any record keeping or technical errors in the cases reported positive.

The laboratory will send all test results to the MRO for his review. Employees who are reported to the MRO as positive must be able to provide documentation from their physician and/or pharmacy verifying that they are under legal medical care. The MRO has strict and narrow FAA guidelines to follow when reviewing a positive test result. The MRO must determine "...that there is a legitimate medical explanation for the confirmed positive result that is consistent with legal drug use..."

Per the Aviation Medical Review Officer Guide, "Roles and Responsibilities In Federally Mandated Anti-Drug Abuse Programs", page 37, if the employee can not satisfy these MRO guidelines, the MRO must report "...a "verified" positive test according to the established company procedure...and verifies that the positive report is evidence of illegal drug use..."

Follow up on the MRO's report and any disciplinary action is per the respective carrier's policy, DOT 49 CFR 40, and FAA 14 CFR 61 et al. These include the option to rehab or terminate the employee. These decisions are left to the discretion of management and are not subject to the collective bargaining process, per 14 CFR 61 et al.

Department of Transportation
Office of the Secretary
49 CFR PART 40
Procedures for Transportation Workplace
Drug Testing Programs

and

Department of Transportation
Federal Aviation Administration
14 CFR 61 et al.

Alcohol Misuse Prevention Program for
Personnel Engaged in Specified Activities
Final Rule

First an update on the Department of Transportation (DoT) employee workplace testing programs. The year 1994 saw many new rule and statutory enactments.

The Omnibus Transportation Employee Testing Act of 1991 (the Act) (signed into law October 28, 1991 by President Bush) mandated workplace employee testing for drugs of abuse and alcohol misuse. On Tuesday, February 15, 1994 the DoT/FAA's Alcohol Misuse Prevention Program for Personnel Engaged in Specified Activities (AMPP) became a Final Rule under authority of the DoT per procedures and rules published in 49 CFR Part 40 and 14 CFR 61 et al.

In particular to aviation the Act also amended the FAA Act of 1958 with new sections: §§614(b)(1), (b)(2), (c) and (c)(1). All these new sections of the FAA Act deal with the prohibition of service, including the permanent bar, referral, evaluation and treatment of employees. The AMPP included these legislative provisions which did not appear in the previously discussed drug rule.

Among these additional provisions were requirements to have a Substance Abuse Professional (SAP) new §614 "permanent bar" for covered employees. The SAP requirement did not exist with the drug rule, although referral, evaluation and treatment options were in place. SAP referral and evaluation are now mandated for drugs and alcohol, but treatment is still an option for companies to offer. The permanent bar precludes an employee who tests verified-positive twice, or had used alcohol on-duty, from exercising the certificated privileges, for a Part 121 or Part 135 certificate holder, or a contractor thereof, that were in use at the time of the second verified-positive for alcohol.

Subsequently on August 19, 1994, and becoming a FINAL RULE on September 19, 1994, the DoT made amendments and clarifications to the drug rule (first published in December 1989) which made it parallel the new alcohol testing rule (AMPP). Now all the requirements for the SAP, referral and evaluation, as well as the permanent bar, apply to verified-positive drug tests as well. Moreover, the September 19, 1994 mandates split sample urine specimen collection which became effective on August 15, 1994 and had been previously promulgated. The details of the "bar" are available in 14 CFR Part 121 Appendix I & J. Appendix I covers the drug rule and Appendix J covers the alcohol rule. The various rules are too voluminous to reprint and are not part of this discussion.

As the DoT has stated in the past, this testing process will continue to remain dynamic, with updates and changes made when warranted by new technologies and procedures becoming available, and issuing clarifying amendments to the rules as they become necessary.

Concerning employer independent authority (discipline actions and treatment policies), each individual workplace must be consulted. Internal company actions differ because the DoT/FAA rules have allowed employers to exercise

independent authority.

The following is a brief summary discussion of the AMPP. The Alcohol Misuse Prevention Program for Personnel Engaged in Specified Activities became a statutory reality on Tuesday, February 15, 1994 and must be put into effect no later than January 1, 1995. No later than July, 1994, Part 121 and Part 135 certificate holders, and their contractor companies, had to submit a certification statement to the FAA, certifying their compliance with the new rule.

The AMPP rule states, "This rule is intended to ensure that public safety is maintained by preventing alcohol misuse by safety-sensitive aviation employees.... The rule uses three primary tools for reducing the threat of alcohol misuse in aviation.

First, by amending parts 65, 121, and 135, the rule prohibits certain alcohol-related conduct by employees performing safety-sensitive duties.

Second, under the provisions of new Appendix J to part 121, such employees must be subject to pre-employment, random, post-accident, reasonable suspicion, return-to-duty, and follow-up alcohol testing. This testing is federally-mandated but will be administered by the affected employers.

Third, in accordance with requirements in Appendix J, employees subject to the rule must be provided with materials designed to educate them about the provisions of the rule and the consequences of engaging in alcohol misuse."

Information and/or education/training materials are to be made available to covered employees, and is mandated by the AMPP to be provided by the employer. All testing will be accomplished using DoT approved procedures and breathalyzer equipment administered by a trained alcohol breath technician as specified in the rule. All these details are available in the DoT and FAA rules. Employees who are verified-positive for alcohol shall be referred to the approved SAP for evaluation (again refer to the respective company policy). Any recommended treatment coverage will be per the respective company policy. Breathalyzer test results are immediately available from the breathalyzer print-out, no interpretations are necessary; therefore, the rule requires no MRO for alcohol tests.

This is one of the major differences from the drug rule. The alcohol rule does not use a MRO to interpret the results. The AMPP rule does not permit the use of alcohol, including alcohol based medicines, in any form. Therefore, no MRO is required to determine if the use was legal or illegal as any alcohol use is prohibited.

Violating the AMPP twice (testing at 0.04 or higher twice, or any combination of: a refusal to test, going through an SAP-evaluation or rehab experience, testing at 0.04 or higher, adding to two times) will invoke the permanent bar.

Furthermore, alcohol use on-duty one time will invoke the permanent bar. The FAA says the permanent bar means that the certificate holder will never again use the privileges held at the time of being verified-positive, to work for a Part 121/135 certificate holder or contractor-employer.

- END -

APPENDIX - - D

DIFFERENCES BETWEEN CARRIERS

Intake and referral resources are specified by the respective company benefit policy. In place of the Employee Assistance Representative, an HMO or PPO representative may perform similar functions to ensure the employee and/or family members are directed to the appropriate resource.

In a general way, the following actions take place:

- ** The HMO or PPO representative is aware of the various resources in the vicinity, the milieu of services offered by each, as well as their ability to provide the services they offer with a high level of competency,
- ** The HMO or PPO representative conducts an initial interview with the client to determine the nature and severity of the problem.
- ** The HMO or PPO representative arranges the referral for appropriate care consistent with the client's needs by making a specific appointment for the client,
- ** The HMO or PPO representative assists the treatment provider and client in developing a specific ongoing recovery plan.
- ** The HMO or PPO representative, with the consent of the client, follows up with the treatment provider to determine the client's progress, evaluate the quality of care and appropriateness of the referral.

Again, with the client's consent, the HMO or PPO representative contacts the client's family to obtain their perception of the client's progress as well as to determine what level of family involvement would enhance the recovery process.

All of the above is handled with the highest level of respect for the client and with the highest level of confidentiality possible.

Suggested Reading and Reference List

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District 142 EAP Manual

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EAP — Geared to Help

July 16, 2001

To: ALL DISTRICT LODGE 142 EMPLOYEE ASSISTANCE PROGRAM
COORDINATORS

Subject: EAP Coordinator's Primary Responsibility

Over the years the District Lodge has issued guidance letters concerning local lodge members accepting appointment as District Lodge EAP Coordinators and the potential consequences of simultaneously holding multiple positions and engaging in political activity. EAP Coordinators are strongly *discouraged* from being other than an EAP Coordinator. Due to recent issues it is time to update and revisit this guidance.

Multiple Roles: EAP Coordinators must be aware that their **primary** responsibility is to be *objectively* responsive to the *entire* membership. This is a **singular** commitment! It is impossible to objectively perform in multiple and sometimes conflicting roles. Moreover, EAP criteria are entirely different from other roles. To quote policy from the District EAP Coordinators Manual: "EAP Coordinators should...not confuse their duties with that of union representatives whose obligations are quite different...."

Politics: Elected positions can convey the perception of having chosen sides. Perception, whether real or imagined, plays a prominent role in affecting the success of the EAP Coordinator. Without *neutrality* the position of EAP Coordinator is automatically compromised. It is essential that a coordinator *remain non-active* in company and union politics. Political activity on the part of the EAP Coordinator *severely impairs* the Coordinator's ability to serve our brothers and sisters.

EAP Coordinators who find themselves in the above circumstances should review the Coordinators Manual and thoroughly reexamine their motives for becoming an EAP Coordinator. And please, where sufficient personnel exist, explore the possibility of asking other members to share in the duties and responsibilities of the Local Lodge. Simply put, a "Coordinator" coordinates. If you wish to become an EAP Coordinator, please, be only a Coordinator. The EAP mission *is* that important!

Fraternally and sincerely,

Paul M. Shultz.
Chairman - Employee Assistance Program
District Lodge 142 - I.A.M.A.W.
cc: W. Freiburger

District 142 EAP Manual



AIRLINE MACHINISTS DISTRICT 141 IAMAW

P. O. BOX 3141 • SO. SAN FRANCISCO, CA 94083-3141 • PHONE (650) 873-0662 • FAX (650) 873-1676

REPRESENTING 35,000 AIRLINE AND AIRLINE SERVICE COMPANY EMPLOYEES



August 5, 1993

TO: ALL DISTRICT 141 EMPLOYEE ASSISTANCE PROGRAM COORDINATORS

In 1986, a letter was written by Bill Combs, (at the time, Director, District 141 IAM/EAP). That letter dealt with EAP. Coordinators accepting appointment to Local Lodge positions, or running for elected offices. Below is a revision of that letter. Please pay close attention to the content.

In the past, some of our Coordinators have accepted appointment to Local Lodge positions, or ran for elected Union office. This practice may appear innocent, and at times even in the best interest of the Local Lodge and membership. However, over the years such practices have led to serious consequence

AU Coordinators are well aware that their primary responsibility is to be available and responsive to the entire membership. Involvement in politics severely restricts a Coordinator's ability to serve our brothers and sisters. At times, holding office can convey the perception of having chosen sides. I'm sure this may not be the case nor the intention, but perception, whether real or imagined, plays a prominent role in modern society. Without neutrality the position of "E.A.P. Coordinator" is compromised.

In the past, exceptions have been possible for small stations and in cases where Coordinators have held dual positions for many years. I urge any Coordinator who is presently holding other positions to thoroughly examine their particular situation, circumstances, and motives. Coordinators holding more than one position should contact me so we can discuss the situation and determine if an exception is warranted. In the meantime, please explore the possibility of other members sharing in the positions of the Local Lodge.

If you have any questions, contact me immediately.

Sincerely and fraternally,

Regis G. Wasiecko

Director, District 141

Employee Assistance Program

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