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Section II. Methodology





OPEN MINDS identified over 700 organizations involved in the delivery of managed behavioral health, EAP, Work/Life, and disease management programs between the period 2002 and 2011. These programs were researched and surveyed for their current market involvement, including demographic and enrollment information. The combined effect of changes in service line offerings, and industry integration and consolidation, brought this year’s final number of surveyed organizations to 362.

To determine enrollment, OPEN MINDS surveyed identified organizations for the number of “covered lives” they served by service line in the United States as of January 1, 2011. “Covered lives” were defined as primary members plus dependents. Enrollment in companies acquired by others in the field since 2002, and enrollment in subsidiaries of larger managed behavioral health organizations were assumed to be captured in reporting by their parent companies.

The shift toward increased integration of behavioral health service lines combined with the adoption of new service management models required inclusion of additional programs for evaluation. To best capture these market changes, we increased the number of programs evaluated from five in 2002 to eleven in 2011 (see the table below). Definitions for these programs can be found in the glossary (Section IX).

Over 88% of this year’s total enrollment was self-reported by surveyed organizations. When organizations did not provide enrollment data, OPEN MINDS estimated their enrollment using publicly available data. These estimates were built on information found on organization web sites, SEC reports filed by publicly-held organizations, and general internet research. All organizations were given the opportunity to review and

comment on any estimate generated by OPEN MINDS. If enrollment information is estimated, it is indicated in the tables that follow with an asterisk (*).

Managed Behavioral Health Programs Surveyed in 2002 Compared to 2011

Surveyed Programs	2002	2011
EAP only programs	✓	✓
Work/Life Assistance programs	--	✓
Integrated EAP/Work-Life Assistance programs	--	✓
Utilization Review/Case Management programs (prospective)	✓	✓
Managed Behavioral Healthcare (MBH) only: ASO	✓	✓
MBH only: Risk-Based	✓	✓
Integrated EAP/MBH: ASO	✓	✓
Integrated EAP/MBH: Risk-Based		✓
Disease Management Programs (behavioral health disorders)	--	✓
Disease Management Programs (chronic diseases, not behavioral health)	--	✓
Disease Management Programs (acute care)	--	✓

Even with careful reporting by participating companies, double counting results. Service line integration and expansion since 2002 have resulted in covered lives being represented over multiple service lines, which complicates the reporting of unique lives. Covered lives may also have been calculated and reported differently by different companies. Although double counting has inflated total enrollment numbers by service line, we believe that enrollment numbers accurately reflect the distribution of enrollment across and within the industry.

What follows is our summary of relevant market statistics, comparisons in market share changes from year to year, and a directory of organizations providing specialty managed behavioral health, employee assistance, and disease management programs in the United States.