
Employee Assistance Society of North America



STRATEGIC PLAN

January 2005 – December 2007

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I. PRESIDENT'S MESSAGE

The employee assistance (EA) industry continues to evolve into new and exciting directions. The Employee Assistance Society of North America (EASNA), comprised of thought leaders and change agents, is focused on ensuring that the EA field continues to grow and to flourish. EASNA is moving forward with a renewed commitment to develop an engaged and productive community of individuals and organizations focused on creating healthy and productive workplaces.

The new EASNA will be comprised of multiple stakeholders with a focus on education, research and the promotion of evidence-based practices regarding the delivery of EA services.

To help the Board of Directors crystallize and articulate the above direction, a strategic planning process began with a planning session on May 12, 2004. Following that event, the following steps were undertaken during the remainder of the year:

1. formed a planning group and synthesized the information gathered
2. sought feedback and solidified the Strategic Directions
3. met to complete the plan in the November 2004
4. finalized plans within the new structure
5. created and circulated the three-year strategic plan.

EASNA has listened to what members shared and the Board is charting its future course accordingly.

The challenges facing EASNA include:

- Ensuring **financial growth** in order to provide the type of learning opportunities we envision for the future.
- Developing a strong pool of committed volunteers. **Human resource** issues are always a challenge in a volunteer organization. Volunteers are busy so EASNA needs to plan more effective use of each volunteer and cast our net wider by recruiting and involving a broader group of individuals.
- Executing **information exchange** in a **timely** manner in order to be **responsive** to individuals and organizations concerned about the development of healthy and productive workplaces.
- Mobilizing **research efforts** to demonstrate the value of EAPs.

EASNA intends to continue to bring forth learning opportunities with cutting-edge content and research. We also recognize the challenges experienced by many when it comes to participating in continuing educational opportunities - therefore will be offering not only the annual institute but also leveraging technology to bring opportunities for additional networking and learning including CEUs from the convenience of home or office throughout the year.

The expanded focus that EASNA has incorporated in our new strategic plan is being reflected in the name change that will occur this year with the EA Quarterly. Its new name will be the **Journal of Workplace Behavioral Health: Employee Assistance Practice and Research**. This society-sponsored journal will be instrumental in keeping professionals knowledgeable about the changing needs in the field.

The strategic plan is a “living document”; its intent is to provide guidance on direction and priorities **and** to be a point of dialogue. It can and will evolve as EASNA learns more and responds to changing conditions. Ongoing review and updates will continue to keep this **strategic plan relevant** to EASNA through the 3-year term from January 2005 until December 2007.

Louise Hartley, Ph.D., C. Psych., President

II. MISSION, VISION, VALUES

EASNA was founded in 1985 as a response to the changing face of EAPs and the need for an organization that met both Canadian and American professional development needs. The organization's goal was defined "to provide a leadership role in the encouragement of quality EAP services through the development of Program Standards and an Accreditation process." In 1985, EASNA established a professional code of ethics. This was followed closely by the creation of a refereed journal that was named the Employee Assistance Quarterly. A move was afoot to lay the groundwork for the work needed to create standards. For the next two years, EASNA concentrated on building the critical mass needed to create the body of work necessary to accomplish its goals. In 1989, a group of American and Canadian professionals developed the first draft of the standards. Accreditation followed shortly and due to the success of that initiative and its growth, in 2000-2001 EASNA contracted with COA to administer the process.

MISSION

The Employee Assistance Society of North America (EASNA) is an international leader in advancing knowledge, research and best practices toward achieving healthy and productive workplaces.

VISION

EASNA is:

- The resource for educational solutions, contributing compelling data, standards and best practices.
- A community of diverse and engaged contributors.

VALUES

We value:

- Commitment to integrity, quality and professionalism;
- An innovative and future oriented approach;
- Engaging in inclusive practices that are characterized by collaboration, flexibility and openness to diverse ideas;
- Promoting an accessible learning organization and community;
- Celebrating a collegial, spirited and creative environment;
- Sustaining American and Canadian equity, with openness and encouragement of a global community;
- Accountability through clear goals, directions and expectations.

III. STRATEGIC DIRECTIONS

1. Champion a productive and engaged community

EASNA's diverse community of supporters are actively involved in the consultation, development and implementation of EASNA initiatives that reflect the insight and contribution of many.

- All initiatives of EASNA engage a broad range of individuals to support the depth and commitment essential to a strong and successful organization
- The Board of Directors comprises a diversity of talented and actively engaged professionals whose continuous actions promote EASNA's mission
- EASNA fosters a mutually beneficial partnership with its members, and encourages active participation and commitment to the mission. This includes consultation, recognition, and involvement in various activities.

2. Partner with health & performance stakeholders

EASNA and its various professional partners, whose charter it is to improve organizational and individual effectiveness, collaboratively work to provide leadership to the EA and related fields.

- The structure of the Board of Directors includes positions for partners.
- There exists a partnership development plan and process that will seek out and support alliances that enhance industry effectiveness.
- COA and EASNA strongly collaborate on standards and accreditation.

3. Advance research

EASNA's a committed leader in supporting and promoting innovative research which validates and progresses the EA field resulting in healthier and more productive workplaces.

- EASNA offers its members a quarterly refereed journal focused on profiling cutting edge research in the employee assistance and related health performance fields.
- EASNA focuses its priorities towards identifying reliable and related research, making this information available to its membership and interested partners.

- EASNA actively supports and facilitates the development of new and groundbreaking research in both the employee assistance and related fields.

4. Facilitate information exchange

EASNA offers a collaborative community in which there is an open exchange of information, trends, and issues amongst its members, partners, and stakeholders for the enrichment of the EA field with a focus on quality and excellence.

- EASNA provides members a forum for continuous educational and networking opportunities that promote professional development including the annual Institute.
- In a proactive manner, EASNA disseminates to stakeholders topical news and information that impacts the health and performance of both individuals and organizations.
- EASNA encourages and promotes the sharing of EA best practices and technologies through standards, accreditation, and other methods from a global perspective with particular emphasis on bi-national (Canada & U.S.) perspectives.

5. Leverage technology

EASNA leverages technology to overcome the economic, time, and geographic barriers faced by stakeholders, to enhance their ongoing learning and ability to network effectively throughout the year.

- EASNA provides members access to up-to-date tools and information, including a dynamic website, that facilitate exchange of information.
- Through the use of advancing technologies, EASNA offers educational opportunities to stakeholders including, but not limited to web-based seminars.
- EASNA provides non-traditional access to presentations and trainings through the use of technology.

6. Manage business affairs effectively and responsibly

EASNA implements and maintains a responsible financial business plan.

- EASNA builds management structures and processes that ensure a sound, fiscally managed organization.
- EASNA stays in the black.

IV. PRIORITIES

Priority	Initiative	Strategic Directions	Structure
#1	Offer an “Institute” continually broadening and evaluating the offerings, structure & format (<i>Executive summit, stakeholder summit, etc.</i>).	Facilitate Information Exchange	Professional Practice
#2	Establish the EASNA university that is affordable, revenue-generating and targeted to the broad range of stakeholders (<i>webinars, bookstore, CD roms, chat rooms, listserve, a-sink courses, teleconferences links</i>).	Leverage Technology, Facilitate Information Exchange	Professional Practice
#3	Add value to the EASNA community by effectively growing and retaining the membership and consulting, recognizing and involving stakeholders (<i>recognition, membership management, surveys, etc.</i>).	Productive & Engaged Community	Stakeholder Services
#4	Initiate an information collaborative to advance cutting edge research in the field (<i>EAQ, subscription based news briefs, etc.</i>).	Advance Research, Facilitate Information Exchange	Knowledge Transfer & Research
#5	Exchange and collaborate with related organizations, conferences, websites, journals, etc. (<i>SHRM, AWLP, IHPM, Benefits, Canadian equivalents, etc.</i>).	Partner with Stakeholders	Stakeholder Services
#5	Identify and promulgate best practices in the EAP field (<i>accreditation/standards, ethics, best practices, corporate award, etc.</i>).	Partner with Stakeholders, Facilitate Information Exchange	Professional Practice
#7	Increase the brand recognition of EASNA through public relations efforts (<i>Google, EAP, etc.</i>).	Productive & Engaged Community	Stakeholder Services
#8	Provide leadership to effectively implement the strategic plan, enabling EASNA to thrive as an organization.	Manage Business Affairs	Organizational Effectiveness

III. INITIATIVES PLANS

1. Champion a productive and engaged community
2. Partner with health & performance stakeholders
3. Advance research
4. Facilitate information exchange
5. Leverage technology
6. Manage business affairs effectively and responsibly

Professional Practice:

1.1 Initiative: Offer an “Institute”, continually broadening and evaluating the offerings, structure & format (*Executive summit, stakeholder summit, etc.*).

	Tasks	Priority	Resp	Cross Reference	Date	Done
1.1.1	Explore a variety of options to leverage technology to broaden participation in the Institute.	#1	Fran Pilon/ Rita Fridella	Knowledge Transfer Web	Year 1 – research Years 2/3 - implement	
1.1.2	Sponsor ongoing summits, that are member-purchased, to show a different face to the community.		George Martin	Knowledge Transfer	Years 2/3	
1.1.3	Institute participants have access to Institute documents. Presenters to provide abstracts.		Phil Evans/ Paula Cayley	Web	Years 1/2/3	

1.1.4	Add research track to Institute encouraging student participation (discounts, marketing, etc.).		Fran Pilon	Knowledge Transfer	Years 1/2/3	
1.1.5	Review Institute offerings, structure, format, both within its current context (e.g. world café) and as alternative means of educational formats other than an Institute.		Paula Cayley	Web	Year 1 – Institute Years 2/3	

1.2 Initiative: Establish the EASNA university that is affordable, revenue-generating and targeted to the broad range of stakeholders (*webinars, bookstore, CD roms, chat rooms, listserve, a-sink courses, teleconferences, links*).

#	Tasks	Priority	Responsibility	Cross Reference	Date	Done
1.2.1	Host university research and build bridges to the research community.	#2	Fran Pilon	Knowledge Transfer	Years 2/3	
1.2.2	Offer webinars.		Phil Evans	Web	Years 1/2/3	
1.2.3	Build online library that allows access to resources, links, downloads, etc.		Research	Knowledge Transfer Web	Years 1/2/3	
1.2.4	Offer Past presidents' roundtables to utilize their expertise and involvement with EASNA.		Louise Hartley	Stakeholders 3.2.2	Years 1/2/3	

1.3 Initiative: Identify and promulgate best practices in the EAP field (*accreditation/ standards, ethics, best practices, corporate award, etc.*).

#	Tasks	Priority	Responsibility	Cross	Date	Done

			y	Referen ce		
1.3.1	Create the Corporate Excellence Award.	#5	George Martin	Stakeholder s	Years 1/2/3	
1.3.2	Develop an Employers Guide to EAP.		Eddie Haaz	Web	Year 1	
1.3.3	Recognize EAP organizations that have obtained accreditation or have re-accredited.		Paula Cayley		Year 1	
1.3.4	Develop and promote ethical standards in the EAP Industry.		Barb Veder		Year 2	
1.3.5	Continue support of the accreditation process through mentoring, joint presentations and recognizing EAPs who have become accredited.		Barb Veder		Years 1/2/3	

Knowledge Transfer & Research:

2.1 Initiative: Initiate an information collaborative to advance cutting edge research in the field (*EAQ, subscription based news briefs, etc.*).

	Tasks	Priority	Responsibility	Cross Reference	Date	Done
2.1.1	Identify body of existing research in the EA and related fields.	#4	?	Web	Year 2 (Jan. 06)	
2.1.2	Identify interest and funding resources for new research in EA field.		Dave Sharar	Stakeholders	Year 2 (Jan. 06)	
2.1.3	Facilitate access to data.		Pat Herlihey/ Charlie Williams	Prof Practice 1.2.3 Stakeholders	Years 1/2/3	
2.1.4	Build bridges to research community – (including Doctoral Students in related fields; Government Agencies; Global Partners, six sigma projects: Epidemiology; Health Productivity; Addiction; Safety; Student Assistance).		Charlie Williams	Prof Practice 1.2.1 Stakeholders	Years 1/2/3	
2.1.5	Support the new Journal of Workplace Behavioral Health.		Pat Herlihey	Haworth Press	Years 1/2/3	

Stakeholder Services:

3.1 Initiative: Exchange and collaborate with related organizations, conferences, websites, journals, etc. (*SHRM, AWLP, IHPM, Benefits, Canadian equivalents, etc.*).

	Tasks	Priority	Responsibility	Cross Reference	Date	Done
3.1.1	Explore the possibility of greater collaboration (e.g., exchange of booth space at conferences, discount off fees for attendance at conferences, Board Membership positions).	#5	Maurice Wingate	Organizational Effectiveness	<i>Year 1</i>	
3.1.2	Identify Canadian professional associations in eastern and western Canada in order to reach out to the Canadian HR community and explore the possibility of collaboration.		Monica Scheel	Organizational Effectiveness	Years 1/2	
3.1.3	Develop and implement a strategy for collaborating with SHRM.		Louise Hartley	Organizational Effectiveness	Years 2/3	

3.2 Initiative: Add value to the EASNA community by effectively growing and retaining the membership and consulting, recognizing and involving stakeholders (*recognition, membership management, surveys, etc.*).

#	Tasks	Priority	Responsibility	Cross Reference	Date	Done
3.2.1	Enhance our product offering in order to attract new members (liaise with Professional Practice and KTR groups)		Michael Brooks	Prof Practice Knowledge Transfer	Years 1/2/3	

#	Tasks	Priority	Responsibility	Cross Reference	Date	Done
3.2.2	Mobilize past Board members to continue involvement in EASNA (e.g. advisory council, writing about what they are doing in the Source, volunteering for the Source).	#3	??	Prof Practice 1.2.4	Years 1/2/3	
3.2.3	Celebrate EASNA's 20 th birthday by gathering past presidents together for the Chicago Institute.		Louise Hartley	Prof Practice 1.2.4	Year 1	
3.2.4	Support recruitment and retention of members and increase Canadian representation by contacting members, doing surveys, etc.		Committee members	Web	Years 1/2/3	
3.2.5	Continue to recognize extraordinary contributions in EAP/EASNA including board membership.		Vice President	Prof Practice	Years 1/2/3	
3.2.6	Review membership management procedures with the goal to improve and update.		??		Year 1 (end)	

3.3 Initiative: Increase the brand recognition of EASNA through public relations efforts (Google, EAP, etc.).

#	Tasks	Priority	Responsibility	Cross Reference	Date	Done

3.3.1	Use the Journal of Workplace Behavioural Health to increase brand recognition.	#7	Monica Scheel	Knowledge Transfer	Year 1	
3.3.2	Influence key constituents who are involved in workplace productivity to contribute to public policy/initiatives.		??	Organizational Effectiveness	Years 1/2/3	
3.3.3	Explore the idea of doing a branding strategy.		??	Web	Year 2 or 3	
3.3.4	Ensure the Source is published 3x/year.		??	Organizational Effectiveness Knowledge Transfer Prof Practice	Years 1/2/3	

Organizational Effectiveness:

4.1 Initiative: Provide leadership to effectively implement the strategic plan enabling EASNA to thrive as an organization.

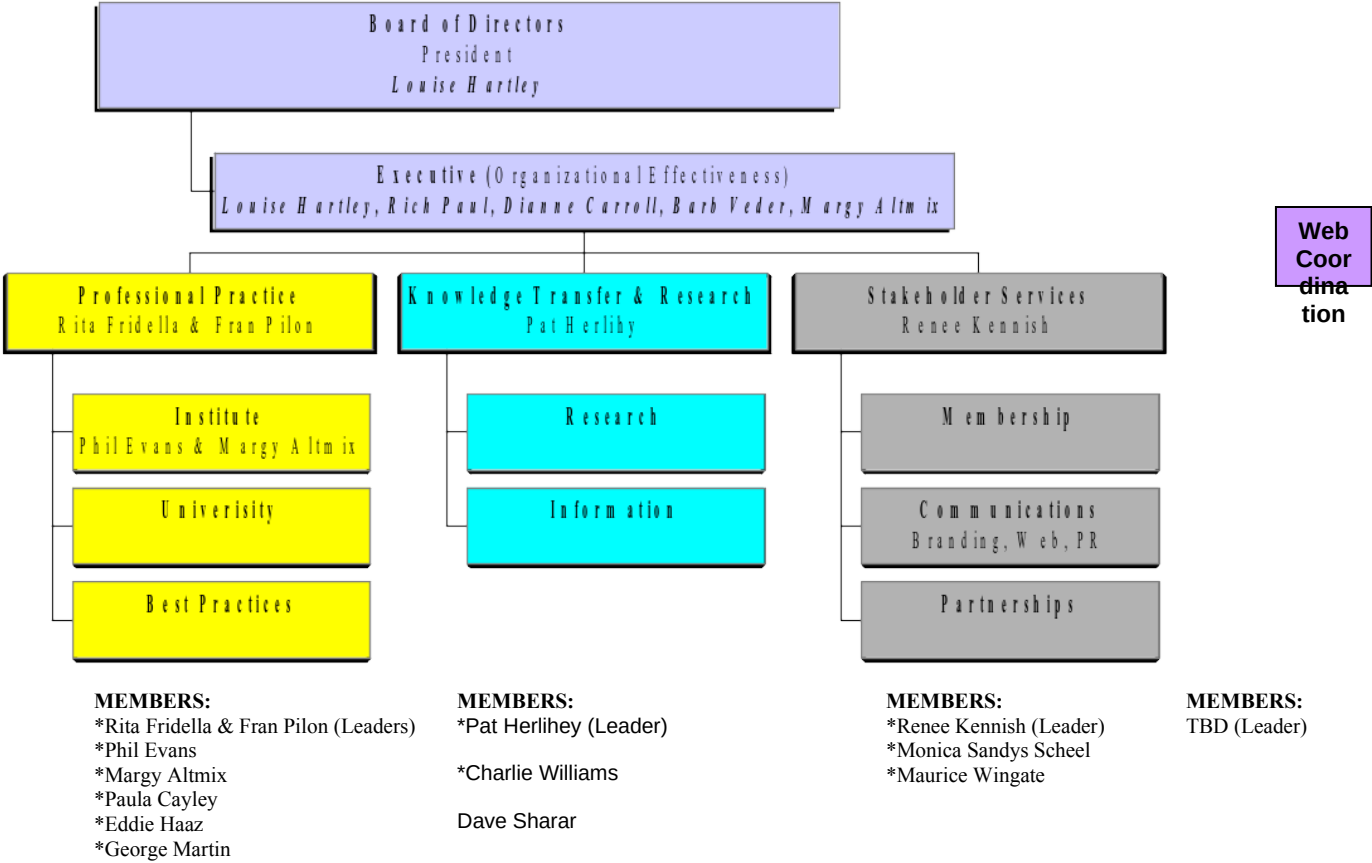
#	Tasks	Priority	Responsibility	Cross Reference	Date	Done
4.1.1	Expand or change revenue streams to facilitate EASNA's future growth and direction.	#7	Barb Veder	Prof Practice Knowledge Transfer	Years 1/2/3	
4.1.2	Develop an inclusive organization that expands its partnerships outside of the traditional EA industry.		Rich Paul	Stakeholder Services	Years 1/2/3	
4.1.3	Ensure the continuation of the strategic and annual planning processes.		Louise Hartley	All	Years 1/2/3	
4.1.4	Ensure technological support and coordination is available to the organization, especially an enhanced website, in order to implement strategic plans.		?		Year 1 – set up Years 2/3 - implement	

V. CRITICAL PATH – JAN. 05-DEC. 07

	Activity	Prio-ity	Dead-line	Update	Responsibility
1	Complete Strategic Plan.		March 05		Leadership Council
2	Each Initiative has written plans for 2005 fiscal year and they are submitted to Executive.		May 05		Leadership Council
3	Monitor, update and evaluate the plan.		Ongoing 05-07		Executive
4	Annual planning for 2006 completed at Board meeting.		Fall 05		Leadership Council
5	Annual planning for 2007 completed at Board meeting.		Fall 06		Leadership Council
6	Strategic planning for next cycle begins.		Jan. 06		Board

APPENDIX

Board Structure



*Board Members as of April 05

Leadership Council (meets monthly):

- Executive
- 3 Leaders
- Web Coordinator