



**easna**

Employee Assistance Society of North America

# **2009 Strategic Plan**

**CREATED SEPTEMBER 2009**

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## **A. Background**

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 2007 EASNA changed its focus to encourage more organizational members, while continuing to welcome individual members. Organizational members pay one fee but all of their employees may have access to the Members Only website. Programs and events are now developed with this structure in mind, as is this strategic plan.

The last strategic plan was completed in 2004 for the 2005-2008 time period. This document will be implemented beginning in 2009. Some activities will be completed this year, others in the next two years.

## **B. SWOT Analysis**

To more clearly articulate EASNA's status, the board developed a SWOT report to identify EASNA's strengths, weaknesses, opportunities, and threats.

### **Strengths**

- We have a wealth of professional knowledge among our members.
- Our revised website is user-friendly and has the potential to be a useful portal for a wealth of information.
- Our membership categories offer a variety of price points for a range of company sizes and an option for individuals.
- We focus on workplace productivity and health more than just traditional EAP issues.
- We have talented leaders who have access to decision makers
- We have a professional association management company.
- Our members include some of the industry's most talented researchers.
- We have new and interesting products (such as the Purchaser's Guide) that validate our relevance in a changing industry.
- The EASNA brand reflects a reputation for quality research.
- We create opportunities for researchers.
- We contribute to the effort to reduce the overall cost of health care.

### **Weaknesses**

- Membership value is not conveyed effectively.
- There is a lack of promotional and marketing materials.
- We have yet to reach a significant number of stakeholders outside of EAP.
- Few individuals who work for companies that at Organizational members use the Members Only website.
- We have yet to fully leverage the website as a membership benefit.
- We lack date on use of our website.
- We are not sufficiently leveraging our academic knowledge.
- Our member outreach has yet to fully use social networking tools.
- We lack awareness of the needs of small and regional EAPs.
- We are not customizing???
- Some committee members have not seen the value of membership and so have never joined.
- There is a lack of infrastructure for doing research

### **Opportunities**

- Identify more students for membership.
- Tap into members' provider networks.
- Create a mission statement to better reflect who we are.
- Identify specific employers who could be encouraged to get involved.
- Determine what we offer that would be also beneficial to employers
- Increase PR for all programs.
- Offer more non-Institute benefits and programs, such as webinars.
- Create more surveys, perhaps including an annual industry survey.
- Leverage opportunities created by national events.
- Develop a rapid response team.
- Sponsor roundtables of companies/customers and EAPs with mutual goals
- Promote the Purchaser's Guide.
- Post Institute information.

- Define direction – research driven; research awards
- Create a listserv.

#### Threats

- The economy and travel restrictions.
- EAPA and the competition for membership dollars.
- Inactivity by EASNA members beyond the board.
- Technology that could further reduce Institute attendance.
- Researchers who are not members.

## C. Reasons for Being

To clearly define the EASNA's reasons for existence and purpose, the board agreed on the following items that articulate why the EASNA remains a valuable resource for its members and why it should exist:

- Mission Statement
- Vision Statement
- Values

### Mission

*Answers these questions:*

- *Why does our organization exist?*
- *What business are we in?*
- *What values will guide us?*

EASNA is the association for professionals interested in advancing knowledge, research, and best practices toward achieving healthy and productive workplaces. Our members include EAP providers, clinicians, work life and human resources professionals, students, educators, and researchers.

### Vision

*Answers this question: What will success look like?*

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.

**D. Objectives**

The following list represents a preliminary set of objectives; additions are expected during future planning sessions. Details on strategies for each objective, and the tactics for each strategy, follow in this document. The objectives, strategies and tactics are listed in no particular order and without any intended emphasis. All objectives in this strategic plan are expected to be achieved and all tactics will be pursued.

<b>Objective #1: Increase employer/purchaser awareness of EAP options and operating standards.</b>		
<b>Measurements:</b>		
1.	Customers at the Institute	
2.	EASNA participation, sponsorship, or exhibits at other events	
3.	Business media coverage of the concept of EAPs	
4.	Request for EASNA tools	
<b>Strategy A</b>	<b>Notes</b>	<b>Status</b>
Develop customer-focused programs.		
<b>Tactics</b>		
1.	Offer sessions at the Institute designed specifically for customers.	
2.	Send a separate news release on employer-focused session.	
3.	Develop a better list of business publications that reach employers/purchasers.	
4.	Provide an electronic tool for members to give to their customers.	

5.	Offer backgrounders and other tools on the EASNA website.		
6.	Offer a directory of EAPs on the EASNA website.		
7.	Create editions of EASNA's <i>Research Notes</i> to address topics of customer interest.		



<b>Strategy B</b>		<b>Notes</b>	<b>Status</b>
Publicize and support research that shows the ROI that EAPs produce.			
<b>Tactics</b>			
1.	Offer institute sessions that publicize research revealing the ROI of company-specific EAPs.		
2.	Collect a series of previous studies on ROI and post them on the EASNA website.		
3.	Develop a white paper type of document addressing EAP's ROI.		
<b>Strategy C</b>		<b>Notes</b>	<b>Status</b>
Encourage EAP topics at employer-focused seminars and conferences.			
<b>Tactics</b>			
1.	Create a speakers bureau of EAP experts (members only, preferably Institute presenters).		
2.	Create a standard presentation on EAP that any board member could deliver.		
<b>Strategy D</b>		<b>Notes</b>	<b>Status</b>
Create an industry-wide survey to develop benchmark data.			

	<b>Tactics</b>		
1.	Create a new ad hoc committee to design the survey.		
2.	Distribute the results to a broad selection of media in North America.		

<b>Objective #2: Define, encourage, advocate, and promote best practices in EAP.</b>			
Measurements:			
1.	White papers and research documents		
2.	Ad hoc committee participation		
3.	Percentage of EAPs requesting Best Practices documents		
4.	Creation of a list of EAP companies throughout U.S. and Canada via surveying		

<b>Strategy A</b>		<b>Notes</b>	<b>Status</b>
Develop, distribute and promote the new Purchaser's Guide as a tool for improving workplace productivity and as a means of showing the ROI of EAPs.			
<b>Tactics</b>			
1.	Create the Purchaser's Guide		Complete
2.	Post the information on the EASNA website and require specific identifying information from each requestor.	On the home page and listed	Complete

		under "In the News" and on a new page exclusively devoted to the Guide.	
3.	Announce the Guide using professional PR distributions services (Business Wire and PR Newswire).		Complete
4.	Create a webinar on the Purchaser's Guide, charging a lower fee for members, higher for nonmembers.	Tentatively scheduled for January 2010.	
5.	Ask HR and other organizations to link to our website page on the Guide.		
6.	Ask our members to link to our website page on the Guide.	Send a broadcast email.	
	<b>Strategy B</b>	<b>Notes</b>	<b>Status</b>
	Promote Institute speakers and the quality of the information they bring to the event.		
	<b>Tactics</b>		
1.	Post the 2009 Institute presentations on the EASNA website.		Complete
2.	Create a newsletter summarizing the 2009 Institute presentations.		
3.	Move up the timeline for the call for presentations to allow for more marketing of the presentations before the Institute.	The deadline for presentations	Complete

		for the 2010 Institute is 9/30/09.	
4.	Publicize the Institute speakers at the 2010 Institute.		
	<b>Strategy C</b>	<b>Notes</b>	<b>Status</b>
	Increase the number of EASNA members participating in Essential Learning's training program.		
	Tactics		
1.	Send twice-monthly emails to members announcing Courses of the Month		Complete
2.	Encourage Essential Learning to exhibit at the 2010 Institute	They declined	
3.	Conduct a survey to determine the members' professional development needs.		
	<b>Strategy D</b>	<b>Notes</b>	<b>Status</b>
	Increase awareness of the accreditation process and other best practices.		
	Tactics		
1.	Develop new materials explaining the accreditation process.		

2.	Host twice yearly webinars on accreditation, co-hosted by COA.		
3.	Create a high-visibility event at the Institute to honor accredited EAPs.		
<p>Objective #3: Raise awareness of EASNA among industry participants and the media that cover the industry.</p> <p>Measurements:</p> <ul style="list-style-type: none"> <li>▪ Increases in membership</li> <li>▪ Institute paper submissions</li> <li>▪ Institute exhibitors</li> <li>▪ Corporate award submissions</li> <li>▪ News releases distributed and news stories published</li> <li>▪ Number of consultants and brokers</li> </ul>			
<b>Strategy A</b>		<b>Notes</b>	<b>Status</b>
Increase new members and reduce attrition among existing members.			
<b>Tactics</b>			
1.	Identify the largest EAP providers in North America that are not currently EASNA members and design recruitment campaigns targeting them.		
2.	Identify the largest vendors supporting EAP providers in North America that are not currently EASNA members and design recruitment campaigns targeting them.		
3.	Identify the consultants and brokers in North America that are not currently EASNA members and design recruitment campaigns targeting them.		
4.	Develop materials for EAP providers to send to their provider network members encouraging them to join and attend the Institute and our upcoming webinars.		

5.	Develop materials for board members to use for membership recruitment when attending EAP industry events.		
6.	Develop an elevator speech of EASNA's five most valuable membership benefits for board members to use when recruiting new members.		
7.	Aggressively recruit non-board members to serve on EASNA's standing and ad hoc committees, beginning with a broadcast email to all members.		
8.	Consider the need to create a new Organizational Level 4 that would be for the largest EAP providers and who would pay a higher dues fee.		
	<b>Strategy B</b>	<b>Notes</b>	<b>Status</b>
	Expand awareness of and submissions to the Corporate Awards Program.		
	<b>Tactics</b>		
1.	Develop an enhanced web presence for this program.	New page posted 9/09.	Complete
2.	Increase PR activity announcing the program.		
3.	Allow for a longer submission period after release of the first announcement by announcing the criteria by November 1.		
4.	Announce the winners no later than February 1.		
5.	Schedule a breakfast meeting with the board members and the award winners.		
6.	Require award winners to register for the Institute—or at least one day.		
7.	Interview the winners for the newsletter.		

Strategy C	Notes	Status
Create awareness of North American employee assistance providers.		
Tactics		
1. Develop an online directory of employee assistance providers. See directory listings for a price of \$500.		
2. Announce the new online directory in a news release.		
3. Advertise the directory in business publications.		

Strategy D	Notes	Status
Celebrate newly accredited and reaccredited EAPs.		
Tactics		
4. Develop an enhanced web presence to recognize accredited companies		
5. Increase PR activity when a company becomes accredited or is reaccredited.		
6. Work with COA to increase awareness of webinars and other opportunities to learn about becoming an accredited EAP.		
7. Develop a guide to accreditation and put it on the accreditation web page.		
8. Highlight accredited EAPs in the new EAP directory.		



Objective #4: Serve as a voice for industry leading EAP providers in legislative and regulatory matters

that threaten the success of the EAP field or that would impose unfair or unreasonable administrative burdens or costs.

Measurements:

- Backgrounders on the website
- Coalition partners working on advocacy campaigns
- Materials sent to legislators and regulators

Strategy A	Notes	Status
Create an Advocacy Committee to provide analysis and, where appropriate, advocacy in legislative and regulatory situations in Canada, Mexico, and the United States, and where necessary, in partnership with related industry associations.		
<b>Tactics</b>		
1. Develop a committee mission statement and determine whether the organization will need financial support to achieve its initial objectives.		
2. Develop a relationship with Pamela Greenburg and the Association of Behavioral Health and Wellness to work collaboratively on legislative and regulatory issues.		
3. Develop a relationship with the National Business Group on Health to work collaboratively on legislative and regulatory issues.		
4. Represent the EAP community on the Mental Health Commission of Canada.	Francois Legault is the	Underway

	representative.	
5.	Develop backgrounders on EAP that would be useful when educating legislators and regulators who are unfamiliar with EAP.	

## **APPENDIX M**

### **The Case for a Trade Association for Employee Assistance**

**Phil Evans**

**President, Employee Assistance Society of North America**

With the support of our volunteer Board of Directors and dozens of Committee members, and the guidance of our professional management company, EASNA has made great strides in its ability to deliver on its mission. While the hopeful signs of an economic recovery may be a part of the explanation for this year's 75% increase in attendance at our Annual Institute in May in Montreal, it is certainly also the result of consistently reaching out to our constituents with meaningful and valuable content and services.

One of the essential characteristics of a strong and resilient industry is a well structured and active trade association. An effective trade association can create greater product awareness, adoption of standardized and ethical processes and best practices, and dissemination of a unified message to help the industry communicate with its stakeholders and customers. However, many people inside the Employee Assistance profession will describe our industry as fragmented and suffering from the unsustainable margins that result from commoditization, rapid consolidation and channel confusion among related industries. Perhaps most threatening to the industry is the current lack of a strong strategic plan at the industry level to deal with the threats and opportunities created by the rapidly changing landscape of healthcare and employer sponsored benefit plans.

The terms “trade association” and “professional association” are often thought of synonymously; however, the term “trade association” is used to more deliberately reflect an emphasis on organizational/business representation rather than individual practitioner membership. We further assert that the functions of a trade association are not currently being addressed in a cohesive and unified manner.

There are examples outside our field that may be instructive. Consider the “Got Milk?” campaign. This is the work of a trade association. Specifically, in 1993 the members of the California Milk Processors Board, --a trade association made up of companies that process and distribute milk-- agreed to allocate three cents of each gallon of milk they sold in order to develop a marketing campaign to promote the consumption of milk. It does not advertise any specific type of milk – only that milk is good for you. So it remains up to each dairy to compete on price, quality, and distribution channels. Thus, as a group, milk processors took on the shared responsibility of educating the public and strengthening demand while being individually responsible for the strength of their own brands and internal operations.

So what is our industry’s version of an equally well-funded and well-organized campaign to educate purchasers and policy makers of the value and impact of workplace-based behavioral intervention?

Is there currently an industry-wide plan to communicate directly to the potential users of the EAP? More importantly, do we, as independent businesses providing EAP services, see it as our responsibility to participate in such a collective effort? And if so, what would we be willing to contribute in terms of time and money to that effort. Most importantly, what could we reasonably expect in return?

We at EASNA believe that the EA industry is now, more than ever, in need of a more fully developed and better-funded collaboration between EA providers, large and small, with the explicit goals of creating standardization in professional practices, sponsoring and disseminating research, influencing public policy, and developing strategies to speak directly to the purchaser and end-users. Over the last several years, the Employee Assistance Society of North America has taken several important steps in this direction. The balance of this article describes these current initiatives in the hopes that EAP providers across North America will come together more deliberately to participate in and influence these strategies in the years to come.

### *Educating the Customer*

The EASNA publication, *Selecting and Strengthening Employee Assistance Programs: A Purchaser's Guide*, provides education, guidelines, data and inside information on employee assistance programs (EAPs). It was written for purchasers and funders of EAPs, and professionals in human resources, finance, occupational health, labor/management and human capital who work at organizations that hire EAPs; for brokers and other sellers of EAP services; and for all those within the employee assistance, workplace wellness and health promotion communities. To date, the *Guide* has been downloaded, free of charge, more than 500 times. It remains available to all interested parties at [www.easna.org](http://www.easna.org).

The EASNA Annual *Corporate Award of Excellence* provides high-profile recognition to two corporate purchasers each year whose own partnerships with their EA provider exemplify the kind of management level collaboration that makes workplace intervention strategies highly successfully and profitable. Information about the 2010 Corporate Awards of Excellence is available at [www.easna.org](http://www.easna.org).

Like the “Got Milk” campaign, the *Purchaser's Guide* and the “*Corporate Award of Excellence*” are two examples of EASNA's efforts to influence the understanding and resulting behavior of the potential EA purchaser with compelling evidence that a well-designed EAP is an equally healthy choice.

### Monitoring and Influencing Industry-Related Public Policies and Regulation

The new EASNA Advocacy Committee is charged with reaching out to policy makers and influencing the regulatory and market conditions that affect the success of our stakeholders. The Advocacy Committee's mission is to represent and advance the interests of the employee assistance community in legislative and regulatory affairs at the state, provincial and federal levels, where applicable. Working collaboratively with other organizations and coalitions, the committee has sought to create a regulatory and legislative landscape throughout North America that will facilitate the maximum growth and positive societal influence of employee assistance programs.

The Advocacy Committee has authored several letters to influence the debates on health care and urged them to recognize the value of EAPs in any proposed reform. Copies of Advocacy Committee letters and minutes are available at <http://www.easna.org/media.html>.

### Defining, Encouraging, and Promoting Best Practices in EAP

Promoting the common interests of companies through a trade association also includes setting a series of standards by which the producer can benefit from industry-wide credibility, while curbing confusion and protecting consumers. In the EAP marketplace several examples already exist. They include the EAP Accreditation standards, originally developed by EASNA and now administered by the Council on Accreditation, and the Employee Assistance Professionals Association's individual CEAP Certification. Both of these long-standing programs are designed to promote best practices in our field through external accountability, yet they remain underutilized if the ultimate goal is to create credibility and consistency in the eyes of the purchaser.

The prerequisite to a trade association's efforts to promote best-practice and industry self-governance is the research to support such declaration of best practices and standards. EASNA's Knowledge, Transfer, and Research Committee (KTR) is an elite cadre of research-focused EA professionals actively engaged in current and relevant research projects. Examples of the KTR in the last year include the publication of the *Purchasers Guide*, the monthly newsletter *EASNA Research Notes* which addresses research topics of current interest, and the recently published "EAP Value Brief," a concise summary of more than 20 years of research findings on the value and return on investment of EAPs in the workplace.

The EASNA Annual Institute, now in its 23<sup>nd</sup> year, is another example of how collaboration and research based-best practices are promoted by a trade association. Consistent with a trade association approach, future Institutes will promote greater organizational-level involvement by EAPs and an expanded focus on the role of industry level collaboration in creating strategies to address common business challenges,

*EAP Organizations as the Building Blocks of a Powerful Trade Association*

The EAP industry has a tremendous opportunity to more effectively convey its value proposition and establish greater credibility through promotion of best practices and standards fueled by research. Here again, other industries represent examples of the importance of the trade association in achieving these goals through self-governance and standards setting.

The actions and goals of a trade association that I have illustrated here require a unified and well-funded trade association. Traditionally, organizations such as EASNA have derived their participation and funding from individuals practicing in the EAP field. In the recent years, EASNA has recognized the importance of engaging EAPs at the corporate level if we are to create a true trade association with the ability to advocate, lobby and speak broadly to the purchasers for the benefit of all providers and consumers of EAP services.

Now is the time, with the global economy still in turmoil, for all providers in the EAP industry, large and small, to come together to help define the purpose of its trade association, to develop an industry level marketing campaign, to advocate more forcefully with policy makers, and to help support research-based standards and increased accountability. It's a frequent criticism voiced among many EA professionals that our field lacks a unified voice and a focused approach to the challenges of this marketplace. EASNA invites you to join with the growing number of other organizations and individuals who are already working to give a stronger voice to these goals and to ensure the long-time viability of the EAP's role in promoting workplace health, productivity and wellness.



