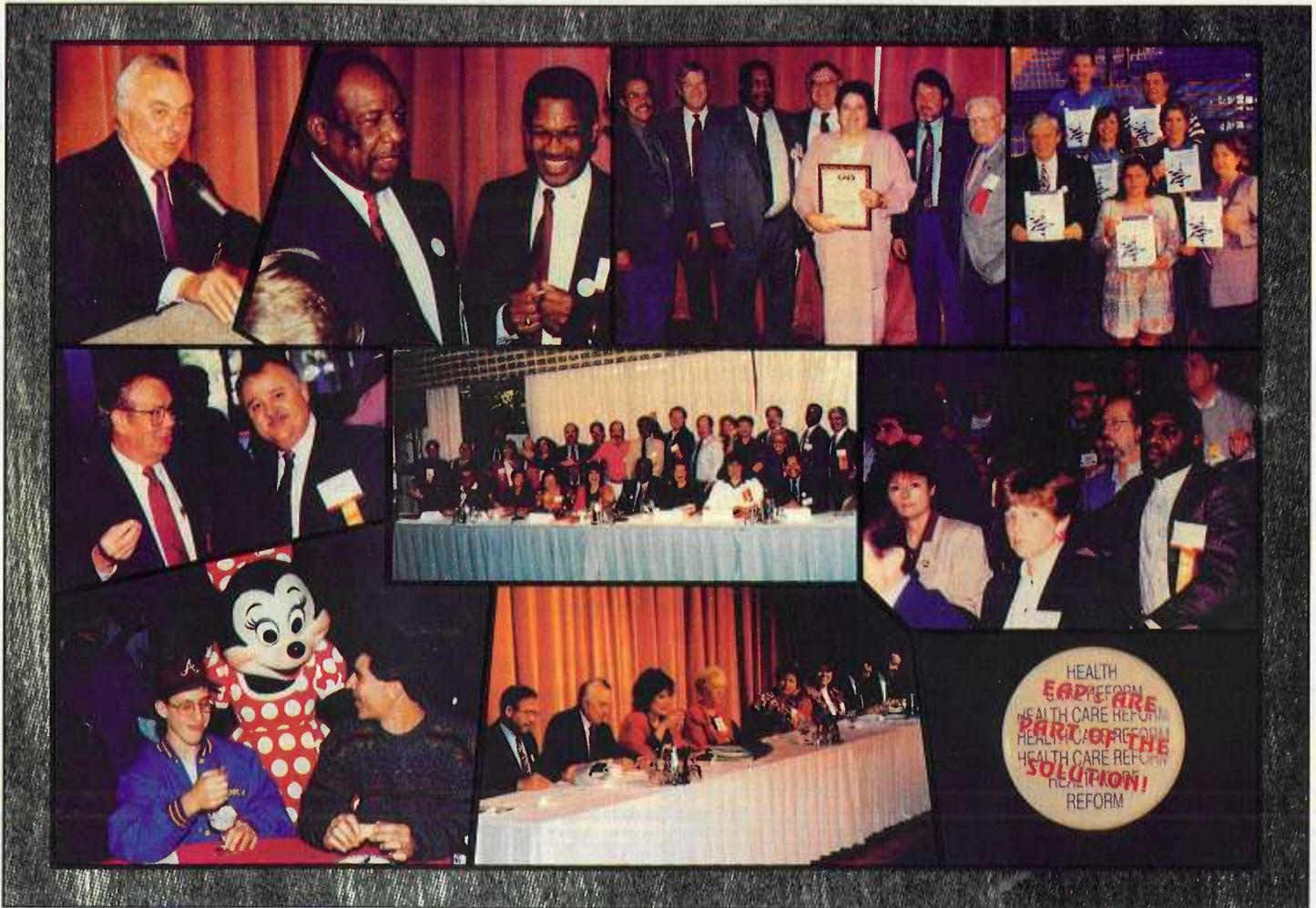


EAP ASSOCIATION  
**EXCHANGE**  
JANUARY 1994  VOL. 24 NO. 1

# Framing a United Profession



## *The EAPA 22nd Annual Conference in Review*

**Eldercare: An Issue Comes of Age as America Ages**



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# The Appendix to the Employee Assistance Programs, Part II: Professional Guidelines

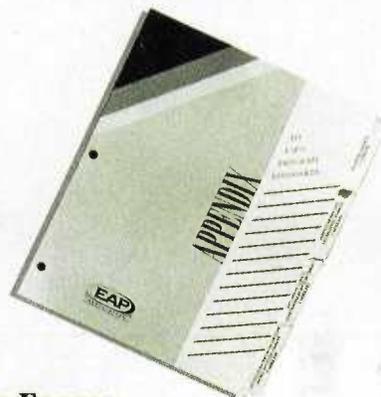
Premiered at the EAPA 22nd Annual Conference in November, the *Appendix* is selling briskly. Examples of policies, forms and much more — all in compliance with the *Standards* — serve as a guide to be modified to the needs of your work organization. Arranged in a loose-leaf format, the *Appendix* provides valuable samples on core functions of EAP activity, such as:



## **EAP Data Elements**

### **Policy Statements**

*Fitness for Duty Policy*  
*Employee Assistance Program Policies*  
*Drug and Alcohol Policy*  
*Entertainment Guidelines*  
*Supervisor Referral Policy*



### **Intake Forms**

**Release of Information/Consent to Disclose Forms**

### **Supervisory Referral Form**

### **Sample Position Descriptions**

*Includes Internal and External*  
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Fun for all, and all for fun.

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Clinton Administration Mental Health Advisor Tipper Gore with EAPA President Sandra Turner.

## FROM THE C.O.O.

# A Financial Statement Report to the Membership

by Michael L. Benjamin  
Chief Operating Officer

When we reported the results of fiscal 1991-92 a year ago, we said that, despite an operating loss of \$455,073 and the resultant impact on our net worth (in which we went from an accumulated surplus of \$323,835 to a deficit of \$131,238), we were optimistic about the Association and our financial viability. We felt the Association's vital signs (e.g., membership dues, annual meeting revenues, CEAP activities) were strong. The source of the operating loss was not a weakness in revenues but, rather, a significant but not necessarily recurring increase in expenses. We had put into place several measures to control those expenditures and we presented a balanced budget for 1992-93.

The goals of the budget adopted by the Board of Directors in Atlanta were to maintain a sound level of programmatic activities, increase non-dues revenues and balance the budget.

Notwithstanding our financial position, the year has reflected an extremely high level of activity and productivity. We have maintained the ongoing program of services and initiated several new ones. We have initiated a new series of professional development programs, increased our professional profile by working with a number of agencies — the National Association of Area Agencies on Aging (NAAAA), the Corporation Against Drug Abuse (CADA), the Center for Substance Abuse Prevention (CSAP) and the Center for Mental Health Services (CMHS) — on new ventures and continued efforts to bring out new professional publications and tools (e.g., *Self Assessment, Glossary and Appendix to Standards 2, Ethics Handbook*).

We did, however, incur an operating loss of \$94,573. As the Financial Summary on Pages 21-24 shows, expenses were roughly \$254,849

under budget and down by \$420,000 from a year ago. This operating loss was largely attributable to the weakness in stimulating new sources of revenue (revenues were down by \$62,495 from 1992 but \$352,000 lower than budgeted). Despite this, we continue to remain optimistic as to the Association's prospects.

Regarding revenues, roughly 71 percent (or \$1,841,498 of \$2,558,174) of our operating budget was to come from the following sources: member dues (32 percent); the annual meeting (30 percent) and certification fees (nine percent) this past year. Actually, these activities generated \$1,912,186 or 86.6 percent of the revenues we earned this past year. These revenue streams continue to be strong.

The weak spots in budgeted revenues from ongoing activities were:

- contributions of \$40,332 were \$36,674 lower than budgeted and \$49,370 less than 1992;
- publication sales of \$52,175 were \$60,925 lower than budgeted and \$43,378 lower than 1992;
- advertising revenues of \$47,763 were \$35,521 lower than budgeted and \$27,705 less than 1992.

A significant portion of the budget was based on several new products and programs that were in the development stages and that are coming to fruition during our current fiscal year:

- *Appendix and Glossary to Standards 2*;
- ethics monograph; and
- education & training programs.

It is clear that with a budget shortfall of \$94,473, almost any combination of successes in these areas would have resulted in a balanced budget. Also, a balanced budget required more time than we had initially projected (to bring new products and services to fruition).

On the expenditure side, expenditures were well under budget as a whole. This is a good news/bad news situation. To the extent that

these expenditures reflect investments in revenue-driven opportunities, then such projected revenue levels were not achieved. These are unlike other reductions (e.g., cutbacks in travel or unfilled positions) which represented a decrease in core operating costs.

My objective for 1993-94 — through deferral of non-critical programs, prudent staffing (hiring freeze on replacement of three staff positions), lower travel and office expenditures, and close work with the Association's Finance Committee — is to have a balanced budget for this fiscal year and to maintain quality services to you — our customers.

As I look to the future of EAPs and the Association, two statements recently surfaced which are of special significance for EAPs. The *U.S. News & World Report* in its November 1, 1993, issue cites the Employee Assistance Professional as one of the "Hot Tracks in 20 Professions." They further cite as part of the training of the EAP that "passing the Certified Employee Assistance Professional examination is recommended...." Clearly, the CEAP is the credential of the future and we must do what is necessary to sustain and fortify the efficacy of the CEAP.

The other statement is from Sandra Turner, President of EAPA, who stated in her article on health care reform in the November/December 1993 *Exchange*: "the impact of health care reform upon American workplaces could be the most profound since the creation of the assembly line and mass production... Any such shift in the workplace ripples through the organization and certainly has an impact on the EAP." She concluded her article with the following: "The best way to predict our [EAP] future is to create it."

We have new growth in EAPA chapters. The current number stands at 94 with seven new chapters coming on line in 1993. And as of September, 1993 we had a total of 3,987 CEAPs.

Note: For the first time, membership in the Association reached 7,056 at the end of September. A year ago, we had 6,865 members, an increase of 158 members. Between January 1 and October 31 of 1993, 1,245 new members joined EAPA. However, a total of 1,055 did not renew their membership during a similar period. The retention of current members is essential to our Association's health and we welcome your suggestions in this regard.

So, we have cause for optimism as we begin 1994. Our mission is set, our spirit is resolute. May 1994 bring you exciting new opportunities as EAPs and contentment in your own lives, as you set about creating the future. ☐



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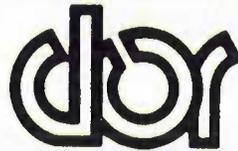
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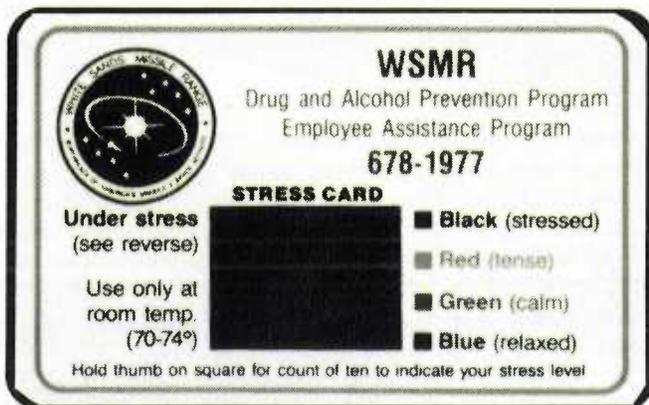
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