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The Story of Integration: Reflections on Four Research Studies Over 20 Years

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ABSTRACT. *This Note is a brief overview of four studies I conducted over a 20-year period around the issues of effective and efficient service delivery models for supporting employee needs in the workplace. Highlights of the changes during this period in the integration of EAP, Work/Life and Wellness are provided. In this note I reflect on the many twists and turns involved with pursuing the study of differing benefit service delivery models during the last twenty years. I also offer a final comment on where the question resides in today's marketplace. A bibliography is offered of key papers related to these studies.*

Introduction

Detailed research examining the evolution of family-friendly employee benefit programs is scarce. But when one looks at the question of whether to integrate benefit service delivery, a persistent theme arises after examination of service delivery practices over the last two decades. The question that professionals raised in the early 1990s is still being asked today: What is the most efficient and effective way to support employees' needs in the workplace?

The three models of delivery of benefit services models of employee assistance programs (EAP), Work/Life (W/L) and Wellness have been alternately leading and contributing incremental improvements to each other throughout this time period. Today, the question is being substantively driven by a focus on improved health and productivity.

The story begins back in 1990, when I was approached by an EAP at a high technology company and asked about a clinical situation. Reportedly, there was concern that a spouse of an employee at the company had a serious substance abuse problem that was negatively affecting the employee's concentration at work. When I suggested that the couple come in to the EAP for an evaluation together, I was told that it was against corporate policy.

As a family clinician, I wondered why a company would refuse to allow an evaluation for the couple in order to understand the employee's decrease in productivity at work. This policy seemed particularly puzzling since in another area of the same company, dependent family members were routinely being offered support and services in their Work/Family Department. Upon further investigation, I discovered that the same employee only policy for EAP was also present in many other major corporations across the country. The reasoning at the time was that there were too many legal problems regarding providing services to dependents via the EAP Departments.

Study 1

Around this same period in the early 1990s the Work Family field was burgeoning.^{1,2,3} It was then that *Working Mother Magazine* first began what became its' annual list of the "Top 100 Family Friendly Companies." In fact, the company I described above had made the list and was even featured on the cover of this magazine and lauded for its family friendly policies.

Puzzled by the conundrum that dependents could be serviced by one benefit department but not another within the same corporation, I conducted the *National Survey of EAP and Work/Family Programs*.⁴ It was based out of Boston University's Center on Work and Family. The study was done to better understand the larger national policy on this topic. This project was the first of four studies conducted over a 20-year period that examined a variety of issues relating to different kinds of delivery service models.

The primary reason for this initial study was to document the nature of the corporate policies on this issue at the companies comprising the "Top 100 Family Friendly Companies." The research question was which variables would predict that a company might be interested in a collaborative or integrated form of service delivery model. The study was based on theory of integration that evolved from a study conducted in the mid 1960s by Lawrence and Lorsch at Harvard University, regarding the concept of integration versus decentralization in the manufacturing field.⁵

The sample for the study included 79 of the 100 US corporations designated as "Family Friendly." Each of these companies had an employee population of over 1,000 individuals.

Results. Over 75% of the programs reported they did not collaborate nor did they see any need for inter-departmental or inter-programmatic integration or even collaboration of services. The rationale offered for the separation of services was that respondents considered EAPs and W/F programs to be distinct entities requiring very different professional skill sets. In addition, 81% of EAPs stated that the reason for having the policy of separation of the two programs was due to the fact that they were historically developed as different programs. Upon further questioning in a qualitative format, however, the most frequent answer was the more revealing reason of having "turf wars" in that both departments feared that collaboration might lead to the elimination of their program.

Study 2

The second study in the series was called *The International Survey of EAP and Work/Life Professionals*.⁶ It was conducted in 2000 at the request of EAPA's Work/Family Task Force. This task force had been in existence since the early 1990s and was actively involved in tracking the relationship between EAP and Work/Family Programs. The Chair of the task force, Dr. Sandra Turner, hired me to conduct a major new survey of EAP and W/L professionals. The project was also supported by the Chair of the EAPA Research Committee, Dr. Mark Attridge. The goal was to better understand what the individuals who actually provide these services thought about the concept of collaboration of effort between the two programs.

This second study expanded the initial sampling pool from that used in the earlier Boston University study - which had only surveyed US companies - to include EAP and W/L professionals practicing in Canada as well as in the US. {Note - Please see Csiernik's 2005 edited book that offers an expanded view of the role of the EAP professional and EAP services in Canada.⁷}

Results. Most of the 950 respondents in the second study saw a need for more collaboration of effort between EAP, W/L and Wellness programs. However, some study participants also expressed concern about a potential decrease in service quality if there was integration of these services. Once again the theme of "turf" issues arose from both fields: The EAP providers considered themselves stronger on clinical issues while the W/L professionals reported having a stronger focus on organizational development issues.

Study 3

A third study on this topic, the *International Survey of EAP and W/L Vendors*, was conducted in 2002 again at the request of EAPA and with the same leadership team as in Study 2.⁸ This study was focused on external vendors providing EAP and W/L services to larger companies both in the US and Canada. At this point in time, health and wellness services had become one of the hot trends in both countries. Thus, a small group of 12 wellness vendors were also approached for

inclusion in this third study. The final sample for the study included representatives of 213 external vendors. Including a third programmatic element to the service mix (i.e., Wellness providers) added a new perspective to the integration story.

Results. Clear evidence for integration was found in this study as most of the respondents claimed existing natural alliances with one program type or another. Two thirds of these providers predicted that within the next 10 years all three area of services would be provided under one umbrella department or all-inclusive service offering. As the study surveyed external vendors of services, their prediction can also be viewed in light of their anticipated, and hoped for, business strategies of further integration and consolidation.

Study 4

The fourth and final study on this topic was called *A Longitudinal Lens on the Evolution of EAP, Work-life and Wellness Benefit Programs*.⁹ It was conducted in 2008 and was a retrospective look at the original 100 Family Friendly companies identified in 1993. The study was conducted out of the University of Michigan's Labor Studies Program. The focus was to document how the delivery of benefit services at these companies had evolved over the previous 15 years.

In developing the study sample, we learned that one third of the original companies had simply disappeared while another third had merged with or been acquired by other companies more than three times. We decided that experiencing three or more mergers or acquisitions indicated that the original corporate culture no longer existed in the same capacity and therefore this portion of the sample was also excluded from the study. The remaining one third of companies still intact provided valuable insights about integration.

Results. The primary outcome of Study 4 suggested a resiliency in benefit service offerings across all three specialties of EAP, W/L and Wellness despite a larger context of layoffs, cutbacks, mergers, and a general downturn of the economy. Another noteworthy finding was that a majority of these US companies now operated in a global marketplace and thus were

struggling with creating service delivery models that fit the complex demands of this larger global context. Perhaps the most striking finding from this last study was the discovery of how unions have played such a strong role in the development and resilience of all three of these programs as important components of the overall package of employee benefits.

Closing Comments

Concerns of whether “to integrate or not” and “what to integrate” have changed dramatically over the last 20 years. Current trends towards holistic health and improved employee productivity have reframed some of the semantics, but the core question remains: Is it better for an organization to provide separate services so that employees can choose which “door” they want to enter? Or is having multiple yet separate departments an outdated mode of benefit service delivery? As the field lacks a rigorous evidence base to yield a definitive answer, the question remains largely unanswered.

However, the findings from the four studies profiled in this brief suggest that integrated and more collaborative kinds of service delivery models tend to have more advantages than disadvantages, especially for the employees and covered dependents who use the services. One major advantage is that employees with more stigmatized issues involving mental health and substance abuse – who routinely go untreated due to shame or social embarrassment and may avoid using an EAP – are now being supported when they can feel more comfortable in seeking assistance from a service that has a more holistic and less threatening name.

Ultimately, though, it appears that the degree to which services are maintained and delivered separately or in a more integrated fashion revolves around the particular corporate culture of the organization where the employee works. Interestingly, in the seminal 1993 study the main predictor variable for having an integrated service delivery model was the existence of a “collaborative” style of corporate culture. Indeed, considered in light of the aggregated findings from all four of our studies, even though many of the elements have evolved over the years, corporate culture continues to play a leading role in the Story of Integration.

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