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Making the Business Case for EAPs:

How to Demonstrate Your Value

Goal Statement: This workshop will provide employee assistance providers with strategies and examples of how to measure and document the business value of their services to purchasers. A review of research will be presented that summarizes key studies on EAP outcomes and cost-benefit analyses. Interactive discussion will focus on the application of a business-value strategy and how to use findings from research for improving the practice and marketing of EA services.

Abstract

Need for the Workshop

Most employee assistance providers focus much of their energy on the day-to-day delivery of high quality services to their clients -- the employees and family members who work with the employee assistance professionals. How these services are then presented as something of value to the purchasing customer is often a secondary concern or a concern that comes up only at the point of sale or contract renewal. Why is this? Naturally, the demands of the client in the office (or on the phone or on the Web) are first priority for a provider. The needs of the individual employee, family member or manager must be met. However, simply reporting the facts of delivery of these services may not be enough for an EAP to be considered a valuable investment by the purchasing customer. When employers provide employee assistance services for their employees, they usually do so for a variety of reasons. An implicit (or in some cases, explicit) expectation is that the employer will get a return on this investment of business resources that is equal to or exceeds the amount of money spent on providing the EAP. Although a formal cost-benefit analysis and report is not done for most purchasers, there is nonetheless an informal expectation is that there should be some kind of demonstration of a return on investment (ROI) that makes it worth it, from a bottom-line business perspective, to continue to provide EAP services.

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Goals of the Workshop

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Overview of Part 1: Identifying the Business Value for EAPs

It is important for EA providers to measure and report on how their services contribute to the business goals and objectives of the purchaser. A five-step model is presented that helps to organize and specify the areas that need to be addressed in making the business case for EAPs.

- Level 1 - Why do employers need EA services? (how does the EA contribute to overall business goals and employee needs)
- Level 2 - What kinds of EA services are used? (EA utilization reporting)
- Level 3 - What is the impact of EA services on the individual users of EA services (direct outcomes of satisfaction and clinical outcome surveys)
- Level 4 - What is the impact of EA services on the larger company? (business value in quicker return to work, lower absenteeism, higher productivity, less turnover, lower health care costs, lower workers compensation costs, less accidents, etc)
- Level 5 - What is the overall economic value of EA impact compared to the cost of providing the EA service? (cost-benefit ROI analysis and additional business value that is not possible to measure in dollars)

Overview of Part 2: Review of Research Literature on Business Value

A detailed annotated bibliography of research studies on EAP outcomes and cost-benefit analysis will be provided. This bibliography was prepared to assist EA providers in finding key research articles and consultative papers. The purpose is to increase the awareness of published studies and conference papers that address the outcomes experienced by EAP clients, the cost-benefit analysis of the business

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value of EAPs and the conceptual and methodological issues in conducting research on these topics. A

total of 53 papers are included in the bibliography.

Part 1. EAP Outcome Studies = 12 studies are reviewed.

Part 2. EAP Cost-Benefit Studies = 10 studies are reviewed.

Part 3. Issues in Conducting Research on EAP Outcomes and Cost-Benefit = 31 studies are reviewed.

Overview of Part 3: Application of Conceptual Model and Research Literature to Your EAP

This part of the workshop will engage participants in how to best apply the conceptual model on business value and how use existing research findings to demonstrate how their EA practice meets the need of the purchaser. A group discussion format will allow participants to describe how their EAP works with their customers concerning issues of business value and cost-benefit. Workshop attendees are encouraged to bring example of their reporting for critique.

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Speaker Profile

Mark Attridge, Ph.D., M.A.

Principal, Research and Analysis
Optum® Division of United HealthGroup Corporation

Dr. Attridge has over 16 years experience in conducting basic and applied research. With Optum® since 1994, he has been responsible for the design and implementation of collaborative research studies, for development of outcome and satisfaction surveys, and consulting on measurement of financial return on investment (ROI) for Optum services. He received a doctoral degree in social psychology from the University of Minnesota and a masters degree in communication from the University of Wisconsin-Milwaukee. Dr. Attridge is the Chair of the Research Committee for the national Employee Assistance Professionals Association. He has published many research articles in scientific journals and regularly presents findings at national trade and academic conferences.

Conference Presentations

Otis, J., Attridge, M., Riedel, J. (2000 September). Managing Human Capital for Organizational Success. Presented at the Benefits Management Forum and Expo, Chicago, IL.

Attridge, M. & Harmon, R. (2000 June). Telephone Triage: New Evidence for Economic Value. Presented at the *American Association of Health Plans Annual Conference*, Orlando, FL.

Attridge, M. (2000 June). Measuring Mind, Body, Work, and Life Concerns: Development of the LifeScale20 Survey. Presented at the *American Psychological Society Annual Meeting*, Miami, FL.

Riedel, J. & Attridge, M. (2000 April). The Relationship of Employee Health to Presenteeism and Absenteeism: A Study of Telephonic Nurse and Counselor Interventions in a National Sample. Presented at the *Meeting of the Institute for Health and Productivity Management*, Orlando, FL.

Attridge, M. (1999 November). Worksite Trainings: A Nationwide Study of Hot Topics, Evaluation and Outcomes. Presented at the *Employee Assistance Professionals Association 28th Annual Conference*, Orlando, FL.

Attridge, M. (1999 August). Outcomes of Educational Interventions for Employee Stress: A Longitudinal Controlled Study. Presented at the *American Psychological Association 107th Annual Meeting*; Boston, MA.

Attridge, M. (1999). Measuring Outcomes in Applied Settings: A Managed Care Perspective. Presented at the *American Society of Aging 45th Annual Meeting*; Orlando, FL.

Attridge, M. (1999). The Business Response to Biopsychosocial Needs of Employees: A National Survey of Benefits Managers. Presented at the *American Psychological Association - National Institute for Occupational Safety and Health, Joint Conference on Work, Stress, Health 1999*, Baltimore, MD.

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Attridge, M. (1998 November). The Hartford EAP/Optum Care24 Outcomes Study: Longitudinal Results. Presented at the *Employee Assistance Professionals Association 27th Annual Conference*, Las Vegas, NV.

M. Attridge (1998 June). Pareto Group Instability and the Prediction of Health Care Claims Costs. Presented at the *American Psychological Society 11th Annual Meeting*; Washington DC.

Attridge, M. (1997). Determining the Effectiveness of Demand Management Programs through Outcomes Measurements. *Presented at the 4th Annual Preventive Healthcare Summit*, Philadelphia, PA.

Attridge, M. (1996). Create and Utilize Incredible Surveys for Program Evaluation to Assess Targeted Outcomes. Presented at the *Outcomes of Preventive Health Programs*; IBC Co.; Atlanta, GA.

Recent Published Articles and Book Chapters

Attridge, M. (2000). Research on Employee Assistance: A Vision of the Future. *EAPA Exchange*, Vol. 30, No. 5, 14-15.

Attridge, M., Bergmark, R.E., Parker, M. & Lapp, J. (2000). Trouble at the head of the Class: Teachers Say Job Stress Impacts Their Students' Academic Performance, But It's a Condition That Can Be Reversed. *EAP Digest*, Fall, 30-32.

Lapp, J. & Attridge, M. (2000). Worksite Interventions Reduce Stress Among Teachers and Staff, *International Journal of Stress Management*, 7 (3): 229-232

Miller-Burke, J, Attridge, M. & Fass, P. (1999). Impact of Traumatic Events and Organizational Response: A Study of Bank Robberies. *Journal of Occupational and Environmental Medicine*, 41 (1): 73-83.

Otis, J., Kelly, B., Jacobs, A. & Attridge, M. (1998). Two-Year Effect of a Demand-Side Management Program on Outpatient Utilization: Applied Research Brief - A Summary of Findings to Date, by In *Guide To Managed Care Strategies 1998* (pp. 49-64), Faulkner & Gray.

Attridge, M. (1998). Critical Tools for Measuring Outcomes in Managed Care, *Managed Care and Aging*, 5, pp. 2, 6-8.

Parker, M., Bergmark, R., & Attridge, M. (1997), The Mind-Body Connection: Outcomes Research in the Real World, In J.D. Haber & M.A. Freeman (Eds.), *Primary Care Meets Mental Health: Tools for the 21st Century* (pp. 193-210), Tiburon, CA: Centra Link Publications.

Bergmark, R., Dell, P., Attridge, M. & Parker, M. (1996). Creating An Integrated Health Care System: The Health and Human Risk Management Model, *Managed Care Quarterly*, 4 (1): 36-42.

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