

A STUDY OF THE HUMAN TRAITS  
IMPORTANT TO  
EMPLOYEE ASSISTANCE PROGRAM MANAGEMENT

BY

Sharon L. Ripley

A Thesis  
Submitted to the Faculty of Graduate Studies  
in Partial Fulfilment of the Requirements  
for the Degree of

MASTER OF SOCIAL WORK

Faculty of Social Work  
University of Manitoba  
Winnipeg, Manitoba

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Généralités	0626
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Études des relations interethniques et des relations raciales	0631
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Transports	0709
Travail social	0452

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Pathologie végétale	0480
Physiologie végétale	0817
Sylviculture et taune	0478
Technologie du bois	0746
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Anatomie	0287
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Médecine du travail et thérapie	0354
Médecine et chirurgie	0564
Obstétrique et gynécologie	0380
Ophtalmologie	0381
Orthophonie	0460
Pathologie	0571
Pharmacie	0572
Pharmacologie	0419
Physiothérapie	0382
Radiologie	0574
Santé mentale	0347
Santé publique	0573
Soins infirmiers	0569
Toxicologie	0383

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Généralités	0485
Biochimie	487
Chimie agricole	0749
Chimie analytique	0486
Chimie minérale	0488
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Chimie organique	0490
Chimie pharmaceutique	0491
Physique	0494
Polymères	0495
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**A STUDY OF THE HUMAN TRAITS IMPORTANT TO  
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**SHARON L. RIPLEY**

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## ABSTRACT

The purpose of this study was to explore and describe the human traits important to management of internal, broad-brush employee assistance programs. The methodology of the study was based on job analysis techniques and included a thorough and detailed review of source material, the development of task and trait lists, the rating of traits according to level of importance and amount required, and the exploration of the effects of respondent, program, and organization characteristics on trait ratings. Although no firm conclusions can be made on the basis of this preliminary study, findings suggest that traits related to interacting with others in a professionally valued manner, knowledge of various aspects of employee assistance, one's approach to problems, and dealing with stress are considered most important to the job of internal, broad-brush employee assistance program management and are required in the greatest amounts. Characteristics of managers themselves seem to have a greater effect on their perceptions of the traits than do characteristics of the program or organization.

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## TABLE OF CONTENTS

	Page
ABSTRACT	i
ACKNOWLEDGEMENTS	ii
TABLE OF CONTENTS	iii
LIST OF TABLES	ix
LIST OF APPENDICES	xiii
CHAPTER	
I Overview of the Study	1
Background to the Study	1
Objectives and Rationale of the Study	3
Summary of Methodology	7
Significance of the Study	10
II Literature Review	12
The Evolution of the Field of Employee Assistance	12
Employee Assistance Program Models	24
Business Management Literature	30
Human Service Administration Literature	39
Employee Assistance Literature	46
EAP Management	46
General Practice	51
A Synthesis of the Management Tasks And Traits Identified in the Literature	62
Preliminary List of Tasks	64
Interacting Within The Organization	64
Supervisory and Human Resource Management	64
Administrative Duties	65
Information Gathering and Disseminating	66
Overseeing an EAP	67



Preliminary List of Management Traits	70
Knowledge	70
Skills	71
Abilities	73
Personal Characteristics	73
Job Analysis Literature	75
III Research Design and Methodology	82
Introduction	82
Phase I - Analysis of the Job	83
Introduction	83
Step 1 - Review of Source Material	84
Step 2 - Development of a Preliminary List of Job Tasks	84
Step 3 - Individual Interviews With Job Holders	86
Method	86
Sample	88
Instrument	92
Step 4 - Development of a Comprehensive List of Job Tasks	96
Comprehensive List of Employee Assistance Management Tasks	99
Interacting With the Organization	99
Supervising and Human Resource Management Tasks	101
Administrative Duties	103
Information Gathering and Disseminating	105
Overseeing An Employee Assistance Program	107
Limitations	110
Summary	111
Phase II - Identification of EAP Management Traits	112
Introduction	112
Step 1 - Review of Source Material	112
Step 2 - Development of a Preliminary List of EAP Management Traits	113
Step 3 - Group Focus Session with EAP Managers	114
Method	114
Sample	117

Step 4 - Development of a Comprehensive List of EAP Management Traits	120
Comprehensive List of EAP Management Traits	121
Knowledge	121
Skills	123
Abilities	126
Other Personal Characteristics	127
Limitations	128
Summary	129
Phase III - Exploration of the Importance and the Amount of Each Trait Required	130
Introduction	130
Step 1 - Development of the Questionnaire	131
Step 2 - The Mail Survey	134
The Pre-Test	134
The Covering Letter	135
Administration of the Survey	137
The Sample	139
Limitations	143
Summary	144
Summary of Research Design and Methodology	145
IV Findings	148
Data Analysis	148
A Descriptive Analysis Of The Level Of Importance And Amount Of Traits Relevant To EAP Management	151
Knowledge	152
Importance	152
Amount	154
General Analysis	158
Skills	161
Importance	161
Amount	162
General Analysis	167
Abilities	169
Importance	169
Amount	170
General Analysis	171

Other Personal Characteristics	173
Importance	173
Amount	175
General Analysis	178
All Traits	180
Importance	180
Amount	192
General Analysis	203
Assessment Of The Correlation Of Ratings Of The Two Scales	207
An Exploration Of Significant Differences In Ratings Of Traits	
Based On Respondent, Program, and Organization	
Characteristics	209
Analysis of Variance According to Respondent	
Characteristics	210
Variance of Ratings According to Level of Education	210
Importance	210
Amount	217
General Analysis	217
Variance of Ratings According to Professional	
Background	224
Importance	224
Amount	225
General Analysis	231
Variance of Ratings According to Years of EAP	
Management Experience	233
Importance	233
Amount	236
Variance of Ratings According to Gender	239
Importance	239
Amount	241
General Analysis	241
Overall Variance of Traits According to	
Respondent Characteristics	243
Importance	243
Amount	246

Analysis of Variance According to Program Characteristics	248
Variance of Ratings According to Years of Program Operation	248
Importance	248
Amount	251
General Analysis	251
Variance of Ratings According to the Number of Staff Positions	254
Importance	255
Amount	257
General Analysis	260
Variance of Ratings According to Whether the Program Has a Non-Voluntary Component	262
Importance	262
Amount	263
General Analysis	265
Variance of Ratings According to Percentage of Time Spent on EAP Management Tasks	267
Importance	267
Amount	267
General Analysis	269
Variance of Ratings According to the Program's Point of Accountability	271
Importance	271
Amount	272
General Analysis	274
Overall Variance According to Program Characteristics	275
Importance	275
Amount	278
General Analysis	281
Analysis of Variance According to Organization Characteristics	282
Variance of Ratings According to Percentage of Employees Belonging to Unions	283
Importance	283
Amount	285
General Analysis	285

Variance of Ratings According to Size	288
Importance	288
Amount	290
General Analysis	290
Variance of Ratings According to Type of Industry	294
Importance	294
Amount	294
General Analysis	296
Variance of Ratings According to Gender Ratio of Employees	296
Importance	296
Amount	298
General Analysis	299
Overall Variance of Ratings According to Characteristics of the Organization	301
Importance	301
Amount	303
General Analysis	305
Summary of Variance of Ratings	306
Importance	306
Amount	310
General Analysis	314
Additional Traits Identified	315
Knowledge	315
Skills	316
Abilities	316
Other Personal Characteristics	317
Possible Affects of Fatigue and Desirability on Survey Responses	319
V Conclusions And Implications	328
Appendices	i
References	xxvii

## LIST OF TABLES

	Page
Table 1: Rank Ordering of The Level of Importance of Knowledge Relevant to EAP Management	156
Table 2: Rank Ordering of The Level of Importance of Skills Relevant to EAP Management	164
Table 3: Rank Ordering of The Level of Importance of Abilities Relevant to EAP Management	172
Table 4: Rank Ordering of The Level of Importance of Other Personal Characteristics Relevant to EAP Management	176
Table 5: Rank Order of Traits by Level of Importance	183
Table 6: Rank Order of Traits by Amount Required	196
Table 7: Comparison of Mean Level of Importance For Traits Rated Significantly Different Based on The Level of Formal Education of Respondents	212
Table 8: Comparison of Mean Amount of Trait Required For Traits Rated Significantly Different Based on The Level of Formal Education of Respondents	218
Table 9: Comparison of Mean Level of Importance For Traits Rated Significantly Different Based on Professional Background of Respondents	226
Table 10: Comparison of Mean Amount of Trait Required For Traits Rated Significantly Different Based on Professional Background of Respondents	229
Table 11: Comparison of Mean Level of Importance For Traits Rated Significantly Different Based on Respondents Years of EAP Management Experience	234

Table 12:	Comparison of Mean Amount of Trait Required For Traits Rated Significantly Different Based Respondents Years of EAP Management Experience	238
Table 13:	Comparison of Mean Level of Importance For Traits Rated Significantly Different Based on Gender of Respondents	240
Table 14:	Comparison of Mean Amount of Trait Required For Traits Rated Significantly Different Based on Gender of Respondents	242
Table 15:	Comparison of Mean Level of Importance For Traits Rated Significantly Different Based on The Years of Program Operation	249
Table 16:	Comparison of Mean Amount of Trait Required For Traits Rated Significantly Different Based on The Years of Program Operation	252
Table 17:	Comparison of Mean Level of Importance According to Whether EAP Consists of A Single Staff Position or More Than One Staff Position	256
Table 18:	Comparison of Mean Amount of Trait Required According to Whether EAP Consists of A Single Staff Position or More Than One Staff Position	258
Table 19:	Comparison of Mean Level of Importance According to Whether Program Was Voluntary or Had a Non Voluntary Component	263
Table 20:	Comparison of Mean Amount of Trait Required According to Whether Program was Voluntary or Had a Non Voluntary Component	264
Table 21:	Comparison of Mean Level of Importance According to Percentage of Time Spent Performing EAP Management Tasks	268

Table 22:	Comparison of Mean Amount of Trait Required According to Percentage of Time Spent Performing EAP Management Tasks	269
Table 23:	Comparison of Mean Level of Importance According to The EAP's Point of Accountability Within The Organization	272
Table 24:	Comparison of Mean Amount of Trait Required According to The EAP's Point of Accountability Within The Organization	273
Table 25:	Comparison of Mean Level of Importance According to Whether The Majority of Employees In the Workplace Belong to Labour Unions	284
Table 26:	Comparison of Mean Amount of Trait Required According to Whether The Majority of Employees In the Workplace Belong to Labour Unions	286
Table 27:	Comparison of Mean Level of Importance According to The Size of The Organization In Which The EAP Exists	289
Table 28:	Comparison of Mean Amount of Trait Required According to The Size of The Organization In Which The EAP Exists	291
Table 29:	Comparison of Mean Level of Importance According to The Industry in Which The EAP Exists	295
Table 30:	Comparison of Mean Amount of Trait Required According to The Industry in Which The EAP Exists	297
Table 31:	Comparison of Mean Level of Importance According to The Gender Ratio of The Employees In The Organization	298
Table 32:	Comparison of Mean Amount of Trait Required According to The Gender Ratio of The Employees In The Organization	299



Table 33:	Mean Rating of Personal Characteristics	320
Table 34:	Differences In The Level Of Importance Of Personal Characteristics Between Those Rating The Level Of Importance of "Aloofness" High And Those Rating It Low	324
Table 35:	Differences In The Level Of Importance Of Personal Characteristics Between Those Rating The Level Of Importance of "Aggressiveness" High And Those Rating It Low	325
Table 36:	Differences In The Level Of Importance Of Personal Characteristics Between Those Rating The Level Of Importance of "Cunningness" High And Those Rating It Low	326

## LIST OF APPENDICES

	Page
Appendix 1: Letter Of Invitation To Participate In Phase One Of The Study	i
Appendix 2: Format For Telephone Follow Up To The Letter Of Invitation To Participate In Phase One Of The Study	iv
Appendix 3: Job Analysis Interview Format	vi
Appendix 4: Participant Consent Form	viii
Appendix 5: Letter Of Invitation To Participate In Phase Two Of The Study	ix
Appendix 6: Format For Telephone Follow Up To The Letter Of Invitation To Participate In Phase Two Of The Study	xii
Appendix 7: Questionnaire	xiv
Appendix 8: Covering Letter For The First Mailing Of The Questionnaire	xxv
Appendix 9: Covering Letter For The Second Mailing Of The Questionnaire	xxvi

## CHAPTER I

### Overview Of The Study

#### Background To The Study

The field of employee assistance has been growing and evolving since the welfare secretary days of the late 1800s and early 1900s. It has undergone particularly rapid change during the last two decades (Emener and Dickman, 1982; List, 1986; McClellan, 1985; Sonnenstuhl and Trice, 1986; Sussal and Ojakian, 1988; Thomlison, 1983) with a variety of program models currently in place in a multitude of varying settings. Although there are no Canadian statistics, American figures indicate that "employee assistance programs in the United States have grown in number from 300 in 1972 to over 11,000 in 1988" (Sussal and Ojakian, 1988, p. 71).

A great deal is being learned about the field of employee assistance as it continues to grow and develop. During the last ten years research attention has been focused on understanding assorted aspects of the field including its history and evolution (Thomlison, 1983; McClellan, 1985; Shain, Survali, and

Boutilier, 1986; Clutterbuck, 1988; Midanik, 1991), program benefits (Carr and Hellan, 1980; Starr and Byram, 1985; Bailey, 1986; Appelbaum and Shapiro, 1989; McClellan, 1989; Yandrick, 1993), the strengths and limitations of various program models (Shane and Groeneveld, 1980; Myers, 1984), key components of successful programs (Googins, 1975; Myers, 1984; Lanier and Gray, 1986; Balzer and Parament, 1988), program evaluation (Hofmann, 1983; Burggrabe and Swift, 1984), and ethical issues (Wrich, 1985; Kurzman, 1988; Colon and Ases, 1989).

The changing nature of the field of employee assistance is raising many questions, among them staffing issues (Birkland, 1984). Those studying these issues have concluded that EAP staff competencies are critical to program effectiveness (Dolan, 1980; Masi, 1982; Dickman, 1985). The field of human resource management has long recognized the direct relationship between staff characteristics and the achievement of program goals (Fine, 1958). To date, what research has been conducted on the personnel traits important to EAPs has tended to focus on direct service providers (Birkland, 1984; McClellan and Miller, 1988; Hoffer, 1989). The role of the program manager has yet been largely unexplored.

## Objectives And Rationale Of The Study

The purpose of this study was to explore and describe the human traits important to employee assistance program management. The primary question of the study was "what knowledge, skills, abilities, and other personal characteristics are important to employee assistance program management?".

This question led to a number of additional questions. What are the most important traits in EAP management? How much of each trait is required to adequately perform the tasks of the job? To what extent does the organizational setting affect the human traits important to EAP management? To what extent do characteristics of the program itself influence the traits important to its management? Do certain characteristics of EAP managers themselves significantly affect their perception of the importance of the traits relevant to the job and the amount of traits required to adequately carry out the job? This study was designed to explore all of these questions.

The rationale for addressing these questions lies in the value of such information in the provision of employee assistance. Dolan (1980), Smirow (1980), Masi (1982), Birkland (1984), and Dickman (1985) underscore the

importance of staff competencies in providing effective employee assistance programs. Further support of the importance of this information is found in the field of human resource management. Fine (1974) and Ghorpade (1988) emphasize the direct relationship between characteristics of the worker, specifically her/his knowledge, skills, abilities, and other characteristics, and the accomplishment of job tasks as well as ultimately the achievement of organization/program goals.

Prior to undertaking this research, it was imperative to establish the parameters of the study. Program management was chosen as the focus of study, over the role of the service provider, because of the pivotal importance of this role and the diversity of its functions. For the purpose of this study an employee assistance program manager was defined as any individual who has been given the formal authority to be in charge of the program. In the literature, as well as the industry, the terms "coordinator" and "director" are often used interchangeably with the term "manager". In some cases, managers have dual responsibilities for program management and for providing direct client service. The focus of this study was on managers who devote all of their time to program management as well as those whose time is shared between management and direct service. However, only the tasks related to

the management component of the job were relevant to this study.

The context in which any job exists, including characteristics of both the organization and the specific work unit, influences the tasks of the job and consequently the traits the worker must possess in order to perform the job (Fine, 1974). Therefore, the job tasks of employee assistance program management and the knowledge, skills, abilities, and other characteristics important to the performance of these tasks are influenced by the type of program in which they are found. The manager of a referral only program performs a different combination of tasks than the manager of a broad-brush program, and the manager of a program employed by the organization for whom services are provided performs a different combination of tasks than the manager of an external service program. Consequently, in order to control for some of these influences, a single program model was chosen as the focus of study.

The internal, broad-brush employee assistance program was chosen for two reasons: 1) the broad-brush program model is frequently used in the field of employee assistance today (Birkland, 1984; Gustavsson and Balgopal, 1991), and 2) the internal model lends itself to the provision of the total range of

broad-brush services including those of organizational change (Dickman, Challenger, Emener, and Hutchison Jr., 1988). For the purposes of this study an internal, broad-brush EAP was defined as any program whose staff are employed by the company or organization for whom services are provided, and has a direct service component (often a combination of assessment, counselling, referral, follow-up, group education, health promotion, and consultation on organizational change) to deal with a variety of employee needs as part of its mandate. This definition was used for the purpose of this study and may not be used by all managers in the field.

The supposition underlying this study is that employee assistance program managers perform a unique set of job tasks, and that it is important for them to possess a particular combination of knowledge, skills, abilities, and personal characteristics in order to perform these tasks. Job analysts contend that an individual combination of knowledge, skills, abilities, and other personal characteristics exists for all jobs, and that the identification of these traits is essential to the accomplishment of job tasks and consequently the achievement of organizational goals. Similarities between the job of the EAP manager and the job of managers in other contexts, particularly social service programs, were recognized. However, it is believed that the job of the



employee assistance program manager is distinctive in nature and deserving of individual attention.

### **Summary Of Methodology**

The methodology for this study was based on Sidney Fine's Functional Job Analysis, E. S. Primoff's Job Element Approach to Job Analysis, and Raymond Christal's Task Inventory Development. The process of job analysis is used in the field of human resource management to identify the human behaviours necessary for job performance and the kinds of people the job requires, generally described in terms of knowledge, skills, abilities, and other characteristics (Shneider and Schmitt, 1986). A combination of techniques extracted from Fine, Primoff, and Christal's job analysis models was utilized for the purposes of gathering the required data for this study.

The first phase of the study was designed to facilitate the development of a comprehensive list of tasks relevant to internal, broad-brush employee assistance program management. This was accomplished by following four steps: 1) carefully reviewing the business management, human service

administration, and employee assistance literature; 2) developing a preliminary list of job tasks based on the literature review; 3) conducting four individual interviews with current EAP managers to gather further information about the job; and 4) compiling the data obtained from this process into a comprehensive list of EAP management job tasks.

The second phase of the study was designed to produce a comprehensive list of human traits required to perform the job tasks previously identified. This was accomplished with: 1) a thorough review of the relevant literature; 2) the development of a preliminary list of EAP management traits based on the literature review; 3) a group focus session of a self selected sample of local managers meeting the criteria of the study aimed at generating the knowledge, skills, abilities, and other personal characteristics important to the job; and 4) the development of a comprehensive list of EAP management traits based on all the data gathered in this process.

The third phase consisted of the development and administration of a mail out survey. The purpose of this process was two-fold: 1) to gather information on EAP managers' perceptions of the level of importance of the identified traits and the amount of these traits required to adequately perform

the tasks of EAP management, and 2) to gather information to assess the effects of respondent, organization, and program characteristics on manager's ratings of the traits. The questionnaire was distributed to 128 program managers thought by district and provincial professional associations to meet the criteria of the study. Respondents were asked to rate the level of importance and amount required of 96 traits using two 4 - point scales.

Finally, questionnaire data was analyzed. A descriptive analysis of responses was carried out in order to gain insight into the level of importance of each trait and the amount of each trait required for the job. Mean ratings and standard deviations of each trait were examined. This analysis yielded a rank ordering of traits according to category as well as an overall ranking. To assess whether respondents treated the two scales the same or differently, ratings of the two scales for each of the 96 traits were analyzed using Pearson's Product-Moment Correlation. In order to explore the effects of respondent, program, and organization characteristics on the ratings of the level of importance and amount of each trait required, a series of analysis of variance (ANOVA) was carried out. Possible effects of fatigue and social desirability were explored using t-tests related to respondents ratings of three subtle negative traits. A descriptive analysis was also carried out on data

obtained from the background information section of the questionnaire in order to describe the group of respondents.

### **Significance Of The Study**

This study has yielded valuable findings. First, a thorough understanding of the job tasks of the EAP manager has been obtained, and subsequently, a comprehensive list of tasks has been developed. Second, a list of human characteristics believed to be required to perform these tasks has been formulated. Third, current managers' perceptions of the level of importance and the amount of traits required to adequately perform the job have been described. Finally, correlations between organization, program, and respondent characteristics and ratings of the level of importance of traits and the amount of the trait required were explored and described. These are exciting and valuable developments in the field of employee assistance.

Based on Sidney Fine's extensive study of jobs (1974) one can conclude that the knowledge, skills, abilities, and other characteristics of an employee assistance program manager are variables in the accomplishment of employee

assistance program goals. The extent to which the program manager possesses the important elements of knowledge, skill, ability, and other characteristics will facilitate or impede the achievement of program goals. By identifying the characteristics important to the performance of the EAP manager's job, and utilizing this information to train, hire and further develop managers, it is possible to maximize program effectiveness and enhance the profession.

Although this study provides only an initial understanding of these traits, and reflects the perceptions of respondents only, its findings may be of value to a variety of stakeholders in employee assistance. To organizations interested in developing employee assistance programs as well as those currently providing them, they may be relevant to the effectiveness of their program. To human resource managers, they could be of value in selection, training, performance evaluation, and job evaluation of EAP managers. To educators in the field, these findings may be important to curriculum development. To EAP professional groups, they could be important considerations in the process of developing standards of practice. To unions and individual employees, they could have an impact on quality of service. To EAP managers themselves, they may be important considerations in their own professional development.

## CHAPTER II

### Literature Review

#### **The Evolution of the Field of Employee Assistance**

In order to most fully understand the knowledge, skills, abilities, and other characteristics relevant to the accomplishment of current employee assistance program management tasks, a familiarity with the evolution of the field of employee assistance is of value.

The origins of employee assistance in North America have been traced by many to the late 1800s and early 1900s (Midanik, 1991; Shain, Suurvali, and Boutilier, 1986; Sonnenstuhl and Trice, 1986; Thomlison, 1983). At that time, particularly in the United States, the labour situation was such that industrialized workplaces were employing increasing numbers of workers, the job market was strongly in favour of employers, and unionization of workers was growing. "Frederick Taylor's principles of scientific management and Henry Ford's introduction of the assembly line were having profound effects on the nature of work" (Rinehart, 1987, p. 47).

Early forms of employee benefits developed in the United States around the turn of the century and were well established in Canada by the 1920s (Rinehart, 1987). Employees received a variety of benefits from these programs. Some employers improved working conditions with such changes as improved ventilation and lighting. Some provided economic benefits such as insurance, options on the purchase of company stocks, and pension funds. Some also sponsored a variety of social programs and services such as housing programs, educational programs, medical care, banking services, recreational centres, and libraries, and hired welfare workers to assist employees with their needs (Rinehart, 1987).

However, early employee benefits largely served the needs of the employers. Such programs were provided by employers in an attempt to stabilize the labour force, promote worker satisfaction and company loyalty, block unionization, and avoid strikes (Sonnenstuhl and Trice, 1990), monitor worker behaviour (Thomlison, 1983), and support paternalistic and philanthropic management attitudes (Shain, Suurvali, and Boutilier, 1986; Rinehart, 1987).

Beginning in the mid 1920s and continuing to the mid 1930s many of

these early forms of employee benefits died out. Circumstances which led to the development of such services changed. Employees became disenchanted with corporate paternalism. The Depression created an economic environment that forced companies to cut back on many programs. American companies lost the struggle against unionization with the passing of the Wagner Act in 1936 (Sonnenstuhl and Trice, 1990). The spread of Frederick Taylor's principles of Scientific Management shifted managers' attitudes away from philanthropy and paternalism and toward increasing worker productivity through design of work tasks and close supervision.

As the previous forms of employee benefits died out, new forms evolved based on new developments in the fields of business management and psychiatry. A new model of management, the Human Relations Model, developed from Elton Mayo's studies at the Western Electric Company's Hawthorne plant in 1924. This business management model shifted thinking away from Scientific Management's emphasis on the technical aspects of the work process (Talyor, 1947; Rinehart, 1987) toward a recognition of the importance of the social needs of workers and the effect of these needs on work performance (Mayo, 1933). This new model of management espoused that investing in the personal lives of workers would increase productivity, and



reduce staff turnover and absenteeism. Mayo (1933) contended that workers' feelings about their work, supervisors, co-workers, and environment played an important part in their behaviour at work. This change in management style promoted a more person-centred orientation to management with employee involvement in problem solving and decision making and paved the way for employee assistance as an alternative to the "work or be fired" ideology of Scientific Management (Googins and Godfrey, 1985).

Based on findings from Mayo's studies, some companies offered personal counselling programs for employees. This form of employee assistance trained workers to be counsellors. These counsellors talked informally with workers on the job about personal and work issues. If necessary private discussions were held. Counsellors provided empathetic listening, encouraged the release of feelings, and provided assistance with problem solving. This form of intervention applied the new insights into human behaviour and the new methods of enhancing personal functioning which had developed in the field of psychiatry (Thomlison, 1983). "Companies offering this form of assistance believed that demonstrating concern for workers would increase their morale and thereby improve productivity" (Sonnenstuhl and Trice, 1990, p. 4).

The influx of women into the work force during World War II further influenced the evolution of employee assistance. During the War, the United States Government funded hundreds of mental health and social service programs in industry in an effort to help integrate new employees into the workplace (Sonnenstuhl and Trice, 1986). Also, with limited personnel available, employers attempted to attract and retain workers with the benefits of social programs. These programs and services tended to include direct counselling, provision of information, referral to private and community agencies, and liaison activities between the employees and community agencies (Thomlison, 1983).

The recognition of alcoholism as a disease and the founding of Alcoholics Anonymous in 1935 also influenced the development of the field of employee assistance (Starr and Byram, 1985). The first form of assistance was provided to admitted alcoholics by medical directors of large corporations. The medical directors encouraged alcoholic employees' involvement in Alcoholics Anonymous as a means of obtaining and maintaining sobriety and retaining their jobs (Nahrwold, 1987; Sonnenstuhl and Trice, 1990).

In the late 1940s and throughout the 1950s, the scope of workplace

alcoholism rehabilitation programs grew from offering assistance to admitted alcoholics to early detection of alcohol problems. This change in focus grew out of employers' increasing awareness of the financial costs of alcoholism in the form of absenteeism, increased accidents, decreased productivity, decreased morale, and excessive use of medical and disability benefits. Supervisors were trained to detect the symptoms of alcoholism and to encourage alcoholic employees to seek help. Several problems existed with this approach, however: 1) it focused on lower level employees only, ignoring the problems of alcoholism in upper management; 2) it promoted the hiding of symptoms so only very obvious, late symptoms were often detected; and 3) supervisors were ill-equipped to deal with the manipulation common to alcoholism and after a couple of failed attempts to get the employee to seek help, they often gave up and reverted to covering up for the alcoholic (Wrich, 1980).

For decades labour unions were dissatisfied with employer provided assistance to employees. They were suspicious of the interest of employers in the lives of workers, felt undermined in their role as helper to union members, and perceived employers' programs for assisting employees with social and emotional needs as ineffective (Trice and Roman, 1972; Sonnenstuhl and Trice, 1990). During the late 1950s, labour unions began to act on these growing

concerns. They entered into an agreement with forerunners of the United Way to promote fund-raising via payroll deduction in turn for labour representation on national and local policy making boards and on staff of the United Way. They developed union counselling programs which trained workers to provide information and referrals to community services. They also developed united labour agencies to provide social services to union members including information and referral services, vocational programs, and housing-referral programs (Masi, 1982).

"In the 1960s, employer sponsored programs continued to concentrate on alcoholism, but began to shift their focus from symptomatology of alcoholism to impaired job performance caused by alcoholism" (Wrich, 1980, p.13). This shift was thought to be necessary for a number of reasons. First, it was believed that focusing on job performance rather than alcoholism symptoms would be less stigmatizing for employees and therefore encourage their participation in the program. Second, with increased understanding about an alcoholic's use of denial, it was believed that supervisors would make more progress in dealing with the problem by focusing on job performance rather than the signs of alcoholism. Third, they found that the training provided to supervisors was insufficient to allow them to effectively diagnose alcoholism

(Wrich, 1980). In the new approach, known as "constructive confrontation", supervisors were trained to document poor work performance and to confront workers on the choice between involvement in the company's alcoholism rehabilitation program or losing their jobs if job performance did not improve (McClellan, 1985). These programs were generally staffed by recovering alcoholics who had sustained sobriety through Alcoholics Anonymous (McClellan, 1985). The use of this approach led to the discovery that, in addition to the problems of alcoholism, a significant number of other personal problems were affecting job performance.

During the 1960s and 1970s the field of employee assistance underwent rapid changes. The scope and focus of programs expanded from a single problem, alcoholism, to a broader spectrum of employee problems. "Business was becoming well aware that although 50% of problems in industry were related to alcohol abuse, 50% were not" (Googins, 1975, p. 465). Employee assistance programs began responding to family, marital, and personal problems of employees and by the end of the 1970s such response was typical of EAPs (Dickman, Emener, and Hutchison Jr., 1985). The nature of employee assistance programs changed from the mandatory involvement of the constructive confrontation approach, to a voluntary approach accepting the self

referral of employees and family members (Nahrwold, 1987). Extending services to family members and addressing a variety of problems was not only aimed at addressing the other sources of problems affecting job performance. It also provided employers with another opportunity to address the denial mechanisms of the alcoholic employee as alcoholism may be found to be an underlying cause of a different presenting problem.

The sponsorship of programs expanded from the prototype of sole employer sponsorship to programs co-sponsored by labour and management with workers included on advisory committees, and programs sponsored solely by labour unions for their membership (McWilliams, 1985; Sonnenstuhl and Trice, 1986; Masi, 1987). The number of programs expanded rapidly as cost benefit analysis promoted their value in reducing staff turnover, reducing absenteeism, reducing excessive use of medical and disability benefits, and increasing job performance (Starr and Byram, 1985).

One of the most important factors influencing the growth in scope and numbers of programs during the 1960s and 1970s was the passing of Federal legislation in the United States related to the treatment of alcohol in industry. The most important piece of this type of legislation was the Comprehensive

Alcohol Abuse and Alcoholism Prevention, Treatment, and Rehabilitation Act of 1970, commonly referred to as the Hughes Act (Masi, 1987; Weiss, 1980). This act provided for the establishment of a National Institute on Alcohol Abuse and Alcoholism (NIAAA) which, among other things, mandated occupational alcoholism programs for Federal civil servants, and funded occupational program consultants in each state (Weiss, 1980; Sonnenstuhl and Trice, 1990). In Canada a somewhat parallel policy was developed by the Treasury Board in 1976. This policy required all Federal departments to establish employee assistance programs (Treasury Board, 1976, unpublished material). Although these programs tended to be broad-brush in nature, their underlying purpose was to encourage the voluntary use of programs to detect and deal with alcoholism.

Numerous other factors influenced the expansion of the field in the 1960s and 1970s. They include: 1) changes in the nature of work including increasing incidents of shift work, rapid technological change, worker mobility, and increased time spent on work (Galinsky, 1986); 2) affirmative action legislation and industry's attempts to successfully employ members of the specified target groups (Nahrwold, 1987); 3) a change in social consciousness emphasizing the social responsibility of industry, as well as the desire by

industry to prevent government from legislating such responsibility (Shain and Groeneveld, 1980); 4) changes in labour laws requiring due process prior to termination of employees (Nahrwold, 1987); 5) industry's recognition of the huge cost associated with troubled employees (Nahrwold, 1987; Gould and Smith, 1988; Midanik, 1991); 6) the growth of psychological and organizational theories emphasizing higher level human needs and their impact on job performance (Shain and Goeneveld, 1980; Cayer and Perry, 1988); 7) industry's desire to relieve supervisors of the problems associated with troubled employees (Sonnenstuhl and Trice, 1986); 8) employees' rising expectations of nonmonetary benefits from work and increased union recognition of the importance of social welfare services (Midanik, 1991); 9) employer liability for injuries caused by substance abusing workers and for mental health problems stemming from job related stress (Shain and Groeneveld, 1980); 10) a change toward more democratic and participatory styles of management (Nahrwold, 1987); 11) a general management trend to place more emphasis on the human needs of employees while maintaining profitability (Groepper, Burt, Finney, and Upchurch, 1983); 12) a change in the nature of substance abuse (McClellan, 1985); 13) the changing nature of the work force including the increasing numbers of women, single parent workers, workers who were partners in dual career families, and workers with diminished support from



extended families as a result of relocation (McClellan, 1985; Ozawa, 1985; Nahrwold, 1987; Clutterbuck, 1988; Gustavsson and Balgopal, 1991); and 14) the American National Council on Alcoholism's work in industry aimed at identifying alcoholism in its early stages (McWilliams, 1985).

Employee assistance programs have continued to evolve during the 1980s and 1990s. The reduction of funding of social service programs has had a profound effect on the field of employee assistance (Gustavsson and Balgopal, 1991). Some businesses and professional organizations have developed employee assistance programs out of a sense of social responsibility, in response to the difficulties encountered by employees in getting service from publicly funded agencies. (Dickman, Emener, and Hutchison Jr., 1985). Further, the need for large numbers of unemployed human service professionals to find other job opportunities has had an impact on the number and types of employee assistance programs (Dickman, Emener, and Hutchison Jr., 1985).

A number of business factors have also contributed to the growth and development of employee assistance during the last decade and a half. These include: 1) the need to compete in a global economy; 2) the impact of rapid technological change; 3) increasing costs of employee benefits; 4) the

importance placed on a healthy corporate culture; 5) concerns about quality and productivity in demanding economic times; 6) the recognition of the impact of chemical dependency on job performance; 7) an increasing sense of corporate social responsibility; and 8) the demonstrated financial benefits of EAPs (List, 1986; Nahrwold, 1987; Gustavsson and Balgopal, 1991).

The field of employee assistance continues to evolve. As the nature of EAPs change, the roles of those managing these programs also change. The knowledge, skills, abilities, and personal characteristics required to carry out these roles reflect these program changes.

### **Employee Assistance Program Models**

Characteristics of the context in which any job exists influence the nature of the job and consequently the knowledge, skills, abilities, and other personal characteristics important to it (Fine, 1974; Schneider and Schmitt, 1986; Ghorpade, 1988). The type of program in which an EAP management job is found has significant implications for the job (Sugarman, 1988). An exploration of the various models of employee assistance programs is,

therefore, of value in studying the tasks of the program manager and the human traits important to the accomplishment of these tasks.

The program model in which the EAP management job is found is generally determined by a number of characteristics of the larger organizational context. These include: 1) the size of the organization; 2) the availability of financial and personnel resources for the program; 3) the willingness of senior management to expend these resources on EAP services; 4) the nature of the workplace including its mission, management philosophy, climate, history, and involvement of labour unions; 5) the program's place in the organizational structure; and 6) the availability of community resources (Dickman, Challenger, Emener, and Hutchison Jr., 1988; Gould and Smith, 1988).

Although each employee assistance program has its unique characteristics, EAPs can generally be categorized according to two criteria: 1) the range of services provided, and 2) the organizational affiliation of the service providers.

Based on the criteria of range of services provided, Clutterbuck (1988) and Gould and Smith (1988) describe four program models. The Crisis

Intervention Model provides a narrow, programmatic focus, typically on alcoholism. It provides a reactive service to individual problems generally identified due to impact on job performance. The Personal Assistance Model provides a wide range of services reactive to problems of individual employees which either are affecting job performance or are identified by the employee as requiring professional intervention. Typical problems addressed in this program type are marital, family, emotional, and financial problems. Typical programmatic responses to these problems could include: 1) information and referral only; 2) assessment and referral services; 3) assessment, referral, and follow-up; 4) short term counselling services; and 4) longer term counselling.

The Prevention Model provides preventative services aimed at enhancing the personal well-being of employees and preventing problems from developing. Such services are often provided in the form of group education sessions and can address a variety of issues such as stress management, pre-retirement planning, parenting, and smoking cessation. The Promotion Model is a proactive, health promotion approach providing services aimed at creating an organizational environment conducive to the enhancement of employee functioning. Such services may include: 1) team building; 2) leadership development; 3) conflict resolution; and 4) consultation on such matters as performance appraisals and compensation.

A combination of these program models is commonly referred to in the literature as the "broad-brush" program model. Broad-brush programs tend to offer services at both the micro and macro level. Typically they provide a full range of services including: 1) responding to problems identified by individuals or groups; 2) providing group education services aimed at preventing problems; 3) promoting the emotional and physical well-being of employees; and 4) working to create a work environment conducive to employee well-being.

The organizational affiliation of the service provider is the second generally used criteria for categorizing employee assistance programs. Models which employ service providers as employees of the organization they serve are referred to as internal, or in-house, program models. Service providers employed by organizations that sell EAP services are part of the external program model (Myers, 1984).

Internal, or in-house, program models can be associated with any number of internal departments including: 1) occupational health; 2) human resources; 3) staff development; 4) employee services; and 5) social work. Internal programs may also have a high degree of autonomy, stand quite

independent, and report directly to senior management. Program sponsorship varies from that of the employer only, labour union sponsorship for members, and joint employer/labour sponsorship.

There are three common versions of the external program model: 1) hot-line; 2) consortium; and 3) contractor. A hot-line is a local or long-distance telephone service of assessment and referral. The employee calls a publicized number, the nature of the problem is assessed through telephone conversation, and the employee is referred to a service provider selected from a directory of providers in the employee's community. Consortia are non-profit, publicly funded organizations that sell employee assistance services to organizations on a per capita or fee for service basis. They can provide a full range of services including counselling, preventative programs, and organization promotion programs. Contract arrangements can take any form and can be made with individual private practitioners or employee assistance agencies (Myers, 1984).

Variations in external program models also exist on the basis of the extent of service provided. Full service program models provide unlimited utilization of available services, while limited utilization programs provide a

limited number of sessions at no charge to the employee and charge the employee for any further services (Klarreich, Francek, and Moore, 1985).

One fairly common program model is what is referred to as the internal, broad brush model. Such EAPs employ their own staff to provide a broad range of services for a broad spectrum of problems. Services provided typically include assessment, counselling, referral, follow-up, education services, and the influence of organizational change. Intervention is focused at a personal, or micro level through individual, marital, and family counselling, as well as group education programs. At the organizational, or macro level, consultation on organizational change, human resource management consultation, conflict resolution, team building, and problem prevention are often provided. This is the state of the art program model. "Broad brush, in-house programs provide assistance to approximately 1.2 million employees in the United States" (O'Hara and Backer, 1990, p.69).

## **Business Management Literature**

A review of the business management literature provides a basis for developing an understanding of the role of the employee assistance program manager and the knowledge, skills, abilities, and other characteristics important to that role. Such a review yields an array of managerial tasks and a multitude of traits important to the role of the manager in any setting. These identified tasks and traits will later be integrated with those found in the human service administration and employee assistance literature into a preliminary list of potential EAP management tasks and traits. Current managers of internal, broad-brush EAPs will review these lists and add or delete tasks and traits from these lists based on their experience in the job.

In 1916 Henri Fayol, one of the earliest scholars of management, identified five basic managerial functions: 1) planning; 2) organizing; 3) coordinating; 4) commanding; and 5) controlling. Others such as Luther Gulick in the 1930s and Peter Drucker in the 1950s built on Fayol's work. Gulick described managers as carrying out the tasks of: 1) planning; 2) organizing; 3) staffing; 4) directing; 5) coordinating; 6) reporting; and 7) budgeting. Drucker's work emphasized the importance of planning using



concrete objectives, and controlling finances, manpower, and work flow (Mintzberg, 1973).

Donald Rudkin and Fred Veal Jr. (1973) studied the roles of supervisors, managers, and company presidents and found that they all perform the same tasks, although with varying levels of responsibility. They found that managers at all levels: 1) plan for their area of responsibility; 2) organize to achieve their plans; 3) supervise the people who report to them; 4) control their work unit; 5) take action to assure achievement of their plans; and 6) continually improve their operations.

Nathaniel Stewart (1978) identified a number of tasks as critical to successful management. These tasks include: 1) making decisions and producing results toward organizational goals; 2) harnessing and utilizing all resources, including people, money, time, technology, and information; 3) carrying out specific duties of the job; 4) providing leadership, including clearly defining and establishing priorities, developing strategies for achieving goals, and influencing people to work toward goals; 5) cultivating a work climate conducive to effort and growth; 6) directing the work unit; 7) coordinating with other managers in order to achieve the overall goals of the

organization; 8) delegating responsibility, sharing authority, and assuming subsequent accountability; 9) gathering and evaluating information both formally and informally; 10) preventing, identifying, analyzing, and solving problems; and 11) hiring, evaluating, and developing human resources.

David Brown (1982) addressed the role of the manager and concluded that managers perform six different roles. As decision maker, the manager sees that decisions are made and carried out. As negotiator, she/he works things out with people at all levels within and outside of the work unit and organization, knowing how and where to go to do this. As leader, the manager influences staff to voluntarily accept her/his objectives, goals, and plans. As developer, the manager recruits, selects, and trains people to be competent and committed employees in both the present and future. As innovator, the manager responds to problems with creativity and encourages the same in others. The final role identified by Brown is that of human being. In this role the manager develops personal relationships with others, providing understanding, caring, and support. Brown believes varying amounts of attention are given to each role according to the situation and the capabilities of the manager. He perceives all of the roles, however, as important to the job of the manager.

Following extensive research in a variety of organizations, Henry Mintzberg (1989) concluded that the manager's job, in any setting, consists of ten roles. The figurehead role involves the performance of the ceremonial duties the manager is required to carry out by virtue of her/his position. The tasks involved in this role include the presentation of awards and addressing audiences. The leader role includes the duties involved in assuring the work of the unit is carried out. It involves the tasks of hiring, training, and motivating staff, as well as reconciling the individual needs of staff members with the goals of the unit and the larger organization. The role of the liaison encompasses those managerial activities directed toward developing and maintaining relationships with key personnel outside the manager's unit of responsibility. In the role of the monitor, the manager both actively gathers pertinent information and receives unsolicited information, generally through informal conversations with all levels of personnel. In the disseminator role, the manager shares and distributes some of this information to members of her/his work unit. In the role of spokesperson, the manager passes relevant information to people outside of the work unit, both throughout the organization and within external environments. Acting in the entrepreneur role, the manager aims to improve the functioning of the work unit in response to changing conditions. This is accomplished by developing and implementing

new ways of carrying out the work of the unit. In the disturbance handler role, the manager responds to pressures and changes over which she/he has no control and deals with crises as they arise. As resource allocator, the manager makes decisions about the allocation of all resources including finances, personnel, her/his own time, and work tasks. The final role identified by Mintzberg is that of negotiator. In this capacity the manager develops strategies to deal with both routine and complex issues. Mintzberg perceives these roles as forming "an integrated whole, with the sum being greater than its parts" (Mintzberg, 1989, p.23). Like Brown (1982), Mintzberg believes each role, depending on the setting, will be carried out to greater or lesser degrees.

A number of researchers and scholars have focused on specific managerial functions. Beverly Alban Metcalfe (1982) examined, in detail, one function of management, that of leadership. She carried out a micro-level analysis of four leadership theories and identified 11 tasks important to effective leadership: 1) sharing problems with appropriate staff and encouraging them to generate and evaluate potential solutions; 2) chairing meetings, coordinating discussions, and keeping both focused; 3) accepting and supporting ideas that have the support of the entire group; 4) rewarding

positive behaviour through verbal and nonverbal communication, demonstrating interest in and concern for staff, providing opportunities for personal satisfaction on the job, recommending promotion, helping obtain desired transfers, or recommending increased pay; 5) punishing negative behaviour through verbal and nonverbal communication, or by recommending dismissal or no promotion, 7) encouraging, directing, coaching, and supporting staff; 8) working to reduce frustrating barriers for staff; 9) engaging in constructive performance appraisals with staff including mutual goal setting; 10) designing and implementing means of providing frequent and comprehensive feedback; and 11) matching workers' needs and skills with job opportunities.

Dick Pearson (1988) focused on the supervisory function as it relates to new management job holders. He identified a number of specific tasks related to this function: 1) determining senior management's expectations of the job; 2) organizing the unit's work flow to assure objectives are met; 3) establishing priorities and accomplishing what is important; 4) delegating; 5) assuring that employees receive adequate training; 6) getting to know the work group in general as well as the individuals within the group; and 7) establishing and maintaining a work climate that encourages quality work.

Having examined the roles, functions and tasks of managers in general, the business management literature offers an understanding of the knowledge, skills, abilities, and personal characteristics important to the performance of the various aspects of the job of the manager.

Donald Rudkin and Fred Veal (1973) identified 10 traits they believed to be necessary in order for a manager in any setting to carry out the responsibilities of the job. These are: 1) a desire to manage; 2) a willingness to accept responsibility; 3) ambition to work hard; 4) knowledge of the work; 5) enthusiasm; 6) strong organizational skills; 7) strong problem solving skills; 8) high frustration tolerance; 9) a positive attitude toward others; and 10) a goal oriented approach to work.

Nathaniel Stewart (1978) contends that managerial traits are situational requiring different traits at different times. However, he identifies a nucleus of characteristics important to the effective performance of the various aspects of the job: 1) initiative; 2) the ability to gain the respect and confidence of others; 3) good judgement; 4) the ability to communicate with people at all levels; 5) the ability to effectively use time to accomplish job tasks; 6) flexibility; 7) objectivity; 8) open-mindedness; 9) skills in planning; 10) skills

in organizing; 11) skills in controlling; 12) problem solving skills; 13) decision making skills; 14) directing skills; 15) knowledge of the organization; 16) knowledge of the industry; and 17) technical knowledge and skills required to perform specific management functions.

Lefton, Buzzotta, and Sherberg (1980) discuss the importance of people skills to the job of the manager noting that "managers spend 70 to 80% of their time in one-on-one interactions with people" (Lefton, Buzzotta, and Sherberg, 1980, p. 4). They contend that managers should: 1) possess a good understanding of human behaviour; 2) be skilled in effectively communicating with a wide variety of individuals and groups; and 3) be skilled in motivating people as unique individuals. They assert that managers should be creative in shaping their words and actions to fit the person or group for whom they are intended.

Beverly Alban Metcalfe (1982) perceives social interaction skills as paramount to the tasks of providing leadership. She identifies the important skills relevant in social interaction as: 1) accurate perception; 2) attention to important information; 3) decision-making; 4) persuasion; 5) sensitivity; 6) empathy; 7) verbal skills; and 8) non-verbal skills.

David Brown (1982) underscores the importance of managers developing the competencies necessary to perform each of the roles of the manager. He describes the important knowledge and skills taught by academic institutions including: 1) planning; 2) organizing; 3) budgeting and financing; 4) accounting; 5) auditing; 6) training and development of personnel; 7) communications; 8) work measurement; 9) knowledge of the potential of computers; 10) knowledge of information and control systems; 11) supervision; 12) human relations; and 13) organization development. In addition to the knowledge and skills taught by academic institutions, Brown adds several personal characteristics to the list of important traits: 1) creativity; 2) fairness in dealing with others; 3) consideration of others; 4) foresight; and 5) the ability to give and take in the achievement of goals.

Howard (1985) emphasizes the demands facing managers in light of increasing workloads and the complexity of management jobs. He contends that in order to cope effectively with these demands managers should possess: 1) a strong commitment to the job; 2) believe they are in a position to have some control or influence; and 3) have a positive attitude toward change. In addition, he underscores the importance of managers having a strong support system for both practical and emotional support.



Keffeler (1991) suggests the following characteristics as important to managerial functioning in these changing times: 1) commitment and dedication to the goals and objectives of the organization; 2) alertness to what's going on both within and outside of the organization; 3) decisiveness; 4) self-confidence; and 5) a level of comfort and skill in dealing with financial matters.

A review of the business management literature provides an understanding of the general nature of the job of the manager and the human traits important to the job. An examination of the human service administration literature adds to our developing understanding of the tasks of the employee assistance program manager and the human traits required to perform these tasks.

### **Human Service Administration Literature**

A review of the literature pertaining to the management of human service organizations provides an additional basis for understanding the tasks of employee assistance program management and the human traits important to the performance of these tasks.

Ruth Middleman and Gary Rhodes (1985) examined the job of the human service manager and classified its functions into three primary categories. The first category involves those tasks related to the integration of staff knowledge, skills, and energies into the organizational setting. A number of job tasks are included here such as: 1) helping workers feel valued, needed, and central to the service delivery of the organization; 2) promoting employees' power and self-management; 3) encouraging the expression and understanding of new ideas and differing perspectives; 4) acting as a mediator; 5) facilitating the expression of feelings; 6) modifying plans; 7) using humour; 8) building teamwork; 9) fostering morale; 10) encouraging employee training and development; 11) encouraging constructive responses to change; and 12) offering new ideas and plans. The second primary category encompasses the service delivery functions and includes the tasks of: 1) formal and informal teaching; 2) enhancing commitments to professional values and ethics; 3) identifying and responding to the professional development needs of staff; 4) employee performance evaluation; and 5) program evaluation tasks. The final category includes: 1) general administrative tasks; 2) workload management; 3) processing information; 4) advocating on issues both inside and outside of the organization; and 5) responding to change.

Gross (1985) and White (1985) add to this growing list of human service management tasks those of planning and budgeting. They both underscore the importance of: 1) determining needs and demands for program services; 2) identifying resource requirements and sources of revenue; 3) formulating budget plans; 4) lobbying for approval of plans; 5) developing and utilizing a periodic review and reporting system; and 6) taking corrective action as necessary.

Robert Elkin (1985) adds the accountability function to the list of important aspects of the human service manager's job. He emphasizes the importance of management tasks related to developing and implementing mechanisms to produce and circulate the information required to assure continued funding of the program.

The human service management literature also provides insights into the traits important to the accomplishment of management tasks in human service settings.

McCool and Brown (1977) discuss the importance of conceptual, technical, and interpersonal skills to the work of the human service manager.

They underscore the importance of a number of knowledge and skill items including: 1) systems theory; 2) problem solving; 3) planning; 4) budgeting; 5) decision making; 6) staff training; 7) communication skills; 8) interpersonal relationship skills; and 9) motivation skills.

York (1982) emphasizes the importance of planning and evaluation. Within these skill sets he identifies the importance of skills related to: 1) defining problems, needs, goals, and measurable objectives; 2) establishing priorities; 3) determining the best available means to achieve an end; 4) implementing plans to assure the realization of objectives; and 5) demonstrating the effectiveness and efficiency of programs.

Austin (1985) argues that management functions within a human service organization require the mastery of both analytic concepts and performance skills. He underscores the importance of the manager understanding the political economy of which she/he is a part and being skilled in operating within it. He emphasizes the importance of professional values in decision making within the dynamics of the political economy.

Harold (1985) contends that in order to survive in these economic times,

human service managers must be: 1) skilled in analyzing and understanding the political and economic factors that influence their programs; 2) possess skills in evaluating their programs using both process and outcome measures; 3) possess the ability to promote trust; and 4) respect confidentiality.

Like Austin (1985) and Harold (1985), Neugeboren (1985) stresses the importance of managers being knowledgeable about the nature of the organization in which they work and skilled in operating within them. He believes they require: 1) knowledge of how to accomplish goals and objectives within the context of the organization; 2) a philosophy of service delivery; 3) the ability to clearly identify goals and objectives congruent with organizational goals; 4) the ability to motivate staff; 5) skills in how and when to use authority, control, and power; 6) skills in personnel recruitment, selection, and training; 7) leadership skills; 8) decision making skills; 9) the ability to coordinate and work cooperatively with other departments; 10) awareness of their own and other key people's ideological perspectives; 11) an understanding of the technologies available, as well as the ability to determine what kind of technologies are most appropriate for achieving program goals; and 12) evaluation skills applied to program and staff effectiveness.

White (1985) and Malvern (1985) emphasize the importance and interrelatedness of planning and budgeting skill sets. They both believe managers should be skilled in: 1) determining needs and demands for program services; 2) identifying resource requirements and sources of revenue; 3) formulating budget plans; 4) lobbying for approval of plans; 5) developing periodic reports; 6) reviewing progress; and 7) taking corrective action as necessary.

Elkin (1985) underscores the importance of managers possessing knowledge and skills related to ensuring the continuation of their program. He believes managers must be skilled in establishing mechanisms to gather and distribute the information required to assure continued program funding and must possess skills in negotiating for resource requirements.

Middleman and Rhodes (1985) identify a variety of traits important to the job of the human service organization manager. They believe managers should be skilled in: 1) helping workers feel valued and needed; 2) empowering employees; 3) creating a work climate conducive to the open sharing of ideas and the tolerance of differing perspectives; 4) promoting teamwork; 5) mediating differences; 6) identifying employee training needs; 7)

encouraging staff training and development; 8) formal and informal teaching; 9) enhancing staff commitment to professional values and ethics; 10) developing and implementing evaluation of all aspects of service delivery; 11) evaluating employee performance; 12) distributing the workload of the unit; 13) processing information; 14) advocating on issues both within and outside of the organization; and 14) responding to change with creativity and innovation. They also believe human service managers require: 1) a sense of humour; 2) flexibility; 3) openness to new ideas; 4) creativity; 5) innovation; and 6) acceptance of professional values and ethics.

Having examined the general role of the manager, and more specifically the role of the human service manager, a basic foundation for understanding the EAP manager's job and the knowledge, skills, abilities, and other characteristics important to the performance of that job has been developed. An in-depth review of the employee assistance program literature provides a more specific basis for this understanding.

## **Employee Assistance Program Literature**

A review of the literature specific to EAP management suggests that relatively little research has been conducted on this topic. It appears that this is a subject area just beginning to receive attention. What has been written, however, does provide some good beginning understandings of the role of the program manager and the knowledge, skills, abilities and other characteristics important to the job.

### **Literature Related To Employee Assistance Program Management**

A review of the employee assistance literature pertaining specifically to program management did not reveal any research conducted to identify either the tasks of the EAP management job or the human traits important to the management role. Several authors have provided their personal perspectives on this topic based on their experience in the field. Although not based in research, the opinions of those in the field contribute to the understanding of the topic.



Lorraine Overland and Marilyn Puder (1980) describe the responsibilities of the manager of the employee assistance program of the world's second largest bank. They perceive these responsibilities as including: 1) supervising counselling and clerical staff; 2) developing, overseeing, and evaluating program services; 3) assuring staff adhere to professional ethics; and 4) promoting program services.

Lanier and Gray (1986) identify the tasks of EAP managers working in newly developed programs. These tasks, they believe, include: 1) recruiting, selecting and training EAP staff; 2) developing the necessary orientation and training packages; 3) arranging and scheduling orientations and other training; 4) developing and scheduling ongoing training programs for EAP staff; 5) developing methods and procedures for staff supervision; 6) publicizing and promoting program services; 7) coordinating EAP program activities with those of other departments and labour unions within the organization; 8) arranging and making available professional, organizational, and/or clinical consultation to the organization by the EAP staff; 9) developing methods and procedures for program evaluation, feedback, and research; 10) developing and monitoring program budgets; and 12) developing methods to monitor the quality of service received from community resources. One can assume that management tasks

include the implementation of these developments in subsequent stages of the program.

Appelbaum and Shapiro (1989) identify the manager's responsibilities as including: 1) assisting in policy development; 2) developing program services; 3) designing and implementing supervisory training programs; 4) arranging for, or providing, counselling services; 5) assessing the quality of service provided by community resources; and 6) overseeing the operation of the program.

Walter Wilkins (1990), working in the area of recruitment, developed a position description of EAP managers in order to assist companies looking at recruiting an EAP manager. He describes the principle duties of the EAP manager as: 1) developing and managing program services responsive to the needs of all employees and their families; 2) developing and maintaining a list of community resources and monitoring the quality of service provided by them; 3) consulting with supervisors and management regarding appropriate interventions with troubled employees; and 4) developing and implementing training programs on topics related to wellness for all levels of employees.

In carrying out the tasks of the EAP manager, Richard Kilburg (1980), Francek, Klarreich and Moore (1984), and Ford and Ford (1986) all stress the value of knowledge of systems theory. They contend that general systems theory provides a conceptual foundation for employee assistance management. They believe it enables the EAP manager to: 1) identify and resolve difficulties in the design and operation of their programs; 2) provide quality service to employees by recognizing the employee's connection to both work and family systems; and 3) integrate the program into the workplace by facilitating an understanding of power, relationships, communication, social networks in the workplace, and the role of work in people's lives.

Fred Dickman (1985) in discussing the ingredients of an effective EAP, emphasizes the manager's need for clinical expertise. He purports that the EAP manager needs to possess well developed skills in basic interviewing, counselling techniques, and case management. He also believes the EAP manager should possess skills in a number of clinical areas including: 1) marriage counselling; 2) family counselling; 3) alcoholism and alcohol treatment; 4) emotional problems; 5) financial problems; 6) legal problems; and 7) work related problems.

Barry Sugarman (1988) summarizes his perceptions of the skills required for effective EAP management into three categories. Within the general management category he includes: 1) planning; 2) organizing; 3) coordinating work activities; 4) evaluating services; 5) solving problems; 6) developing and implementing objectives to accomplish broad goals; 7) developing budgets and overseeing expenditures; and 8) communicating effectively. Within the EAP management category he includes: 1) developing and implementing EAP services; 2) promoting EAP services; and 3) overseeing the delivery of EAP services. Skills related to management within the organization include: 1) developing EAP policy; 2) building support for the EAP; 3) training supervisors; and 4) acting as a consultant to management, employees, union and human resource personnel.

McCarthy and Steck (1989) contend that in order to effectively manage an EAP, the manager must understand the culture of the organization in which the program exists. This includes an understanding of: 1) how people and profits are managed; 2) the hidden agendas of the organization; 3) the unwritten rules and the norms which employees have come to accept; 4) the nature of the industry; 5) employee demographics; 6) the corporate perception of the people and people problems; 7) the values, heroes, rites, and rituals of

the organization; 8) the corporate structure; and 9) the business environment.

These perspectives on employee assistance program management provide a valuable basis, however, they seem insufficient for a thorough acquaintance of the topic. In order to enhance the foundation of understanding of employee assistance program management, it is valuable to examine the literature related to the tasks and traits important to general practice in EAPs.

#### Literature Related To General Practice In EAPs

An examination of the literature related to general practice in employee assistance, although not specific to management, provides an understanding of the functions of EAPs and the competencies considered important to perform these functions. This literature provides an enhanced understanding of the context of the EAP manager and the tasks and traits important to the operation of the program. As the overseer of the EAP some of the tasks and traits important to general practice in employee assistance may also be important to the management of the program.

Stephen Birkland (1984), Keith McClellan and Richard Miller (1988),

and Art Hoffer (1989) have conducted research on the competencies important to the employee assistance field in general.

Birkland (1984) conducted a survey in the Minneapolis and St. Paul area to gain information about the kinds of experiential background, education, and skills most valuable to EAP staff. Questionnaires were sent to a sample of 37 EAP professionals in the area who were asked to rate the level of importance of 20 skills. Findings suggested the attributes most important to EAP practice include: 1) the ability to assess chemical dependency; 2) familiarity with community resources; 3) crisis counselling skills; and 4) knowledge of professional ethics and legal liabilities. Birkland further identified personal characteristics such as professional manners, flexibility, and willingness to learn as perhaps being as important as any skill or knowledge area.

McClellan and Miller (1988) conducted a survey aimed at gathering information about respondents' perceptions about the one skill perceived most important to employee assistance work. The majority of respondents identified assessment/referral as being the most important skill. Labour-management relations, employee relations, alcoholism counselling, administrative skills, marketing, benefit management, people skills, and motivational skills were also

identified as most important to small groups of respondents. When asked about the most important characteristic for employee assistance management, responses included knowledge of the work group, personal addiction recovery experience, communication skills, and problem solving.

Art Hoffer (1989) of the University of Calgary conducted an exploratory study to determine future educational requirements of occupational social workers within employee assistance programs. Hoffer asked practitioners and employee assistance educators throughout Canada and the United States to first identify the essential ingredients for preparing students for competent practice in the field of occupational social work and then to rate the identified ingredients using a 5-point scale. Resulting from the study was the identification of a number of knowledge items perceived as vital for inclusion in a curriculum specializing in occupational social work: 1) knowledge of community resources including how to access them; 2) advanced understanding of ethical practice issues; 3) knowledge of social service delivery models in occupational and traditional settings; 4) knowledge of adult life cycles and related crisis; 5) labour/management/industrial relations knowledge and issues; 6) knowledge of addictions and their effects; 7) knowledge of alcoholism and substance abuse theories and treatment; 8) knowledge of power including the

use of power and powerlessness; 9) knowledge of organizational development and practice; 10) knowledge of the significance of work to individuals, organizations, and society; 11) knowledge of organizational theory and behaviour; 12) knowledge of employee assistance programs including history, development, implementation and marketing; 13) knowledge of systems theory applied to individual and organizational issues; 14) advanced knowledge of groups; and 15) knowledge of the impact of new technology and economic conditions on work.

Hoffer's study (1989) also identified a number of skills perceived as highly important to working within an employee assistance program: 1) advanced problem-solving skills; 2) referral skills and techniques; 3) skills in developing and utilizing support networks; 4) crisis intervention skills; 5) skills related to assessment, planning and intervention within the context of person, family, and workplace; 6) short term counselling skills; 7) skills in defining and resolving value conflicts; 8) consultation skills; 9) skills in utilizing confidential information; 10) program planning skills; 11) advanced skills in clinical assessment; 12) stress management skills; 13) skills in developing confidential record-keeping systems; and 14) in-service training skills.



Personal and professional traits were also identified in Hoffer's study. These included: 1) the ability to speak and write clearly and concisely; 2) an attitude of enthusiasm and conviction; 3) objectivity and neutrality; 4) diplomacy; 5) interest; 6) availability; 7) personal and professional confidence; 8) maturity; 9) a generalist perspective combined with an eclectic approach; 10) flexibility; 11) adaptability; 12) assertiveness; 13) the ability to work autonomously; 14) the possession of pride in one's skills; 15) valuing of professional growth; 16) a commitment to the legitimacy of social work practice in the workplace; 17) the upholding of a visionary prospect of organizational change and the creation of democratic opportunities in the workplace; 18) an appreciation of the inter-disciplinary and multi-dimensional nature of occupational social practice; 19) the maintenance of a visible profile within the workplace; 20) the ability to integrate social work values with business values; and 21) self-awareness about personal values regarding work-related issues. (Hoffer, 1989)

In addition to this research, a number of people have added to the literature by documenting their personal perceptions based on their experience in the field.

John Dolan (1980) describes five functions of the EAP practitioner: 1) to integrate the EAP into the organization in which it operates; 2) the administrative function; 3) the educational function; 4) the clinical function; and 5) the evaluation and research function. In order to carry out these functions he believes EAP staff should possess knowledge of: 1) the corporate structure in which they work; 2) personnel functions; 3) benefit and cost factors related to employee assistance; 4) available educational materials; 5) industrial psychology; 6) sociology; 7) business statistics; and 8) data handling. In addition, Dolan identifies a variety of skill sets as important to EAP practice including: 1) skills in gathering and interpreting data regarding the program; 2) needs assessment; 3) budgeting; 4) hiring; 5) running a department; 6) maintaining confidentiality; 7) oral communication; 8) written communication; 9) education techniques; 10) clinical functions; and 11) evaluation techniques. The staff as a whole he contends must be equipped to perform expertly in all areas.

Ray Thomlison (1983) underscores the importance of EAP practitioners possessing a clear conceptual framework to guide their activities and provide clarity of role and purpose. He points out the importance of managers recognizing the differing values and knowledge bases among those with whom

they interact. Such a framework, he contends, alerts practitioners to potential stressors as well as supports and enhances their functioning within the organization.

Stephanie Grossman (1984) describes the professional and personal attributes she considers to be critical to a student's success in an EAP field placement. The attributes she identifies are: 1) assessment, referral, and brief treatment skills; 2) a working knowledge of alcoholism and an understanding of addictions as an illness; 3) familiarity with systems theory; 4) demonstrated verbal and written skills; 5) the ability to organize and control work flow; 6) the ability to work in a setting with less support than is typically found in social service agencies; 7) the ability to function autonomously and to make needs known; 8) maturity; 9) self-confidence; 10) the ability to deal tactfully and effectively with others in a variety of situations; 11) the ability to perceive and react sensitively to the needs of others; 12) a willingness to work with a team; 13) the ability to accept and successfully use the supervisory relationship; 14) a willingness to take risks; 15) sound judgement; 16) initiative; 17) a suitable business appearance and presence; 18) tenacity in problem solving; 19) creativity; 20) innovation; and 21) a positive attitude toward oneself and others.

Fred Dickman, Robert Challenger, William Emener, and William Hutchison Jr. (1988) contend that EAP practitioners should possess strong knowledge of four areas: 1) work, employment and industry; 2) psychology and sociology; 3) employee assistance program service delivery; and 4) organization, administration, and management.

Robert Tanner (1991) argues that the knowledge and skills of social work makes this profession most suited EAP practice. Key to this suitability, he believes, is the knowledge and skill possessed by Masters level occupational social workers in: 1) substance abuse; 2) assessment; 3) referral; 4) intervention modalities; 5) contracting; 6) program development; 7) social policy; 8) administration; 9) community organizations; 10) unions; and 11) human behaviour. Also key are: 1) the person-in-environment perspective; 2) the values of acceptance, confidentiality, individualization, and client self determination; 3) a non-judgemental approach; and 4) objectivity.

Stephen Walsh (1991) identifies a number of characteristics and skills he perceives as requisite to effective employee assistance practice: 1) the ability to recognize one's own limitations; 2) awareness of one's own needs, values, and beliefs; 3) the ability to remain objective; 4) the ability to provide empathy

and unconditional positive regard; 5) skill in active listening; 6) the ability to make accurate assessments; and 7) the ability to make appropriate referrals.

The literature contains several descriptions of the response of academic institutions to the development of employee assistance practitioners. A review of this literature is of value in obtaining the perceptions of curriculum developers related to characteristics important to EAP practice.

Dale Masi and Paul Maiden (1985) describe the University of Maryland's School of Social Work and Community Planning's Masters and Doctoral level programs of EAP specialization. The EAP specialization focuses on both clinical and administrative practice with four groupings of courses: 1) industrial social services and social policy; 2) administration of EAPs; 3) clinical skills in dealing with addictions; and 4) theories and concepts in alcohol and drug addiction. Courses include: 1) an exploration of value issues and conflicts; 2) the history of social services in the workplace; 3) points of human service delivery; 4) a conceptual framework for developing and implementing EAPs; 5) organizational and administrative theories; 6) essential components of EAPs; 7) legal issues; 8) policy development; 9) differences between public and private sector EAPs; 10) evaluation; 11) addictive

behaviour; 12) theories of addiction; 13) information concerning specific drugs; 14) clinical intervention approaches; and 15) information relating to the impact of addictive behaviour on family and the work place.

Quick, Sonnenstuhl and Trice (1987) describe Cornell University's Employee Assistance Education and Research Program. Their program provides courses in: 1) history of employee-management relations; 2) work organizations and troubled employees; 3) organizational behaviour and theory; 4) clinical issues and EAPs; 5) marketing of EAPs; and 6) labour problems. The authors report that this curriculum is very similar to the academic needs determined by the Association of Labour-Management Administrators and Consultants on Alcoholism.

Nida, Foley, Maze, Maze, and Braucht (1987) describe Columbus, Ohio's Franklin University's program for careers in employee assistance. The program blends business training with social and behavioral sciences. Within the latter area, courses are offered in anthropology, sociology, and psychology, underscoring the belief that employee problems need to be considered in relation to their broader socio-cultural context. Within the business area, accounting, business principles, management, and labour relations are taught

with the aim of providing a broad foundation of business knowledge. Clinical skills in brief counselling are stressed. Concentration on EAP management is obtained by taking additional courses in labour law, human resources planning, equal employment opportunity law, and business policy.

Nora Gustavsson and Pallassana Balgopal (1991) report findings of a survey of 14 American graduate schools of social work offering a concentration in occupational social work, a professional background frequently found in the field of employee assistance. Respondents were asked to rank the importance of eight content areas which might be included in an occupational social work concentration. Clinical treatment was ranked most important, followed by alcohol and substance abuse, and thirdly, administering occupational social work.

The business management, human service administration, and employee assistance literature suggests that the work of the manager requires an expansive knowledge base, as well as a multitude of skill sets, abilities, and personal characteristics. In order to make sense out of all the information obtained through this literature review, a synthesis of the identified traits is imperative.

**A Synthesis Of The Management Tasks And Traits Identified In The  
Business Management, Human Service Administration, And Employee  
Assistance Literature**

A detailed review of the general management, human service administration, and employee assistance literature was undertaken with the aim of gathering information about the tasks and human traits important to employee assistance program management. Writings reviewed included those of Mintzberg (1973, 1989), Rudkin and Veal Jr. (1973), McCool and Brown (1977), Stewart (1978), Dolan (1980), Kilburg (1980), Overland and Puder (1980), Lefton, Buzzotta, and Sherberg (1980), Brown (1982), Metcalfe (1982), York (1982), Thomlison (1983), Birkland (1984), Francek, Klarreich and Moore (1984), Grossman (1984), Austin (1985), Dickman (1985), Elkin (1985), Gross (1985), Harold (1985), Howard (1985), Malvern (1985), Masi and Maiden (1985), Middleman and Rhodes (1985), Neugeboren (1985), White (1985), Ford and Ford (1986), Lanier and Gray (1986), Nida, Foley, Maze, Maze, and Braucht (1987), Quick, Sonnenstuhl, and Trice (1987), Dickman, Challenger, Emener, and Hutchison Jr. (1988), McClellan and Miller (1988), Pearson (1988), Sugarman (1988), Applebaum and Shapiro (1989), Hoffer (1989), McCarthy and Steck (1989), Wilkins (1990), Gustavsson and Balgopal



(1991), Keffeler (1991), Tanner (1991), and Walsh (1991).

During the review, each management task and trait were noted. Notes were carefully studied and where slight variations in terms existed, yet the content was clearly the same, tasks or traits were synthesized into one. The developing lists were scrutinized repeatedly in attempt to assure that tasks and traits were clearly defined and distinct. Following this process, tasks were categorized into five groupings for convenience of study: 1) tasks related to interacting with the organization; 2) supervisory and human resource management tasks; 3) administrative tasks; 4) information gathering and disseminating tasks; and 5) tasks related to overseeing an employee assistance program. Traits were categorized into groupings of: 1) knowledge items; 2) skills; 3) abilities; and 4) other personal characteristics.

## Preliminary List of EAP Management Tasks

### Interacting With The Organization

- 1) Works within an organizational context with understanding and respect for the goals, values, and specific culture of the organization.
- 2) Works effectively with both management and labour groups, cognizant of the rights and issues of each group.
- 3) Matches program goals with organizational goals.
- 4) Identifies, accesses and influences key decision making personnel in the organization in order to meet program goals.

### Supervisory And Human Resource Management Tasks

- 1) Recruits and selects appropriate staff for the EAP.
- 2) Trains program staff in all aspects of the EAP.
- 3) Supervises program staff, both clinical and administrative, in the performance of duties.
- 4) Evaluates performance of all program staff.
- 5) Encourages and arranges for the ongoing professional development of

staff.

- 6) Advocates on behalf of staff members on issues relating to pay, promotion, leave, etc. as appropriate.
- 7) Engages in disciplinary action and termination of staff as appropriate.
- 8) Directs EAP staff toward accomplishing program goals.
- 9) Cultivates a work climate conducive to employee effort.
- 10) Deals with tension within the EAP and between the program and other departments as required.

#### Administrative Duties

- 1) Assumes responsibility for the operation of the EAP and subsequent accountability.
- 2) Performs general administrative duties within the EAP.
- 3) Carries out all aspects of budgeting for the EAP, including identifying resource requirements, identifying sources of revenue, planning, negotiating for resources, administering, monitoring, and adjusting the budget as necessary.
- 4) Identifies potential problems and takes action to prevent problems from developing.

- 5) Identifies, analyzes, and responds to problems when they arise.
- 6) Engages in all aspects of program planning, including defining goals and measurable objectives, determining the best available means of achieving identified goals and objectives, implementing plans to assure the realization of objectives, and evaluating the effectiveness of plans.
- 7) Establishes priorities congruent with identified goals and objectives.
- 8) Makes decisions and sees that they are carried out.
- 9) Represents the EAP at meetings within the organization and the external environment as required.
- 10) Represents the EAP at significant milestone events such as retirements, and at significant social events.
- 11) Fosters the visibility of the program in relevant external communities.

#### Information Gathering and Disseminating Tasks

- 1) Gathers relevant information, both formally and informally, from within the EAP, as well as the larger organizational context and the external environment as required.
- 2) Facilitates the flow of information between the larger organization and the EAP.

- 3) Disseminates information within the EAP.
- 4) Communicates, both orally and in written form, in a clear and knowledgeable manner, with all levels of personnel within and outside of the organization.
- 5) Gathers information on needs and demands for program services.
- 6) Informs new employees of EAP services through participation in new employee orientation programs.

#### Overseeing An Employee Assistance Program

- 1) Develops program goals with sensitivity to both management and labour.
- 2) Assesses the impact of all aspects of the workplace on employees.
- 3) Responds to identified stressors by encouraging workplace change or by assisting employees in developing means of dealing with the stressors.
- 4) Understands and responds to life stressors confronting various populations in the workplace.
- 5) Develops, implements, and evaluates EAP services responsive to workplace needs.
- 6) Publicizes and promotes EAP services.

- 7) Collaborates with other departments in the development of internal resources for employees.
- 8) Incorporates key EAP components into the program, including confidentiality and accessibility.
- 9) Promotes the understanding and acceptance of the critical nature of confidentiality and anonymity for the EAP.
- 10) Develops and implements all phases of the EAP.
- 11) Engages in ongoing planning related to program needs.
- 12) Promotes and markets the EAP to individuals and groups among all levels of the organization.
- 13) Provides, or arranges for the provision, of individual or group intervention as appropriate.
- 14) Engages in co-therapy with other clinical staff as appropriate.
- 15) Works toward the development of community services appropriate to the needs of employees of the organization.
- 16) Evaluates program activities to determine their effectiveness and efficiency.
- 17) Develops and implements mechanisms for gathering data related to program usage and service needs.
- 18) Recruits, trains, and supports advisory committee members.

- 19) Participates in advisory committee meetings, providing information, and facilitating the responsiveness of the program to the various populations within the organization.
- 20) Networks within the EAP community to identify current issues and directions.
- 21) Engages in professional development to enhance personal effectiveness.
- 22) Demonstrates and promotes the ongoing value of EAP initiatives among all levels of the organization, including key decision makers.

The same process used to develop the preliminary task list was used to develop a preliminary list of relevant EAP management traits: a detailed review of the literature was undertaken, all potential traits were extrapolated and noted, notes were scrutinized extensively, traits were synthesized into clear and distinct items, and finally categorized into knowledge items, skills, abilities, and other personal characteristics.

## Preliminary List Of EAP Management Traits

### Knowledge

- 1) Knowledge of senior management's expectations of the job.
- 2) Knowledge of the work group in general and of the individuals within the group.
- 3) Knowledge of the industry in which the manager works.
- 4) Knowledge of the organization in which the manager works, including political and economic factors influencing the program, the culture of the organization, and the information and decision making systems within the organization.
- 5) Knowledge of labour unions within the organization.
- 6) Knowledge of community resources and how to access them.
- 7) Knowledge of the technologies available.
- 8) Knowledge of the field of employee assistance.
- 9) Knowledge of the role of work in people's lives.
- 10) Knowledge of human relations.
- 11) Knowledge of organization development.
- 12) Knowledge of systems theory.
- 13) Knowledge of human behaviour.



- 14) Knowledge of industrial psychology.
- 15) Knowledge of sociology.
- 16) Knowledge of addictions.
- 17) Knowledge of labour law.

### Skills

- 1) Interpersonal relationship skills.
- 2) Skills in managing stress.
- 3) Skills in organizing the unit's work flow to ensure objectives are met.
- 4) Skills in establishing priorities and accomplishing tasks.
- 5) Skills in delegating.
- 6) Skills in staff training and development.
- 7) Skills in creating and maintaining a work climate which encourages employees' actions and attitudes.
- 8) Analytical skills.
- 9) Decision making skills.
- 10) Skills in motivating people to voluntarily accept objectives, values, ideas, enthusiasm, and wisdom.
- 11) Communication skills.

- 12) Non-verbal communication skills.
- 13) Skills in encouraging creative problem solving in others.
- 14) Planning skills.
- 15) Organizational skills.
- 16) Budgeting and financing skills.
- 17) Accounting skills.
- 18) Auditing skills.
- 19) Supervisory skills.
- 20) Time management skills.
- 21) Problem solving skills.
- 22) Decision making skills.
- 23) Program evaluation skills.
- 24) Skills in personnel recruitment and selection.
- 25) Leadership skills.
- 26) Skills in maintaining confidentiality.
- 27) Clinical skills including interviewing, counselling, and case management skills.
- 28) Active listening skills.
- 29) Assessment skills.
- 30) Referral skills.

### Abilities

- 1) The ability to think clearly.
- 2) The ability to be objective.
- 3) The ability to gain respect and win confidence of others.

### Personal Characteristics

- 1) A self-starting approach to work.
- 2) A strong commitment to the job.
- 3) A sense of control.
- 4) A perception of change as a challenge.
- 5) A give and take approach to the achievement of goals.
- 6) Sensitivity.
- 7) Empathy.
- 8) Creativity in problem solving.
- 9) A fair approach to others.
- 10) Consideration of others.
- 11) Foresight.
- 12) Flexibility.
- 13) Open-mindedness.
- 14) Credibility.

- 15) A professional value system.
- 16) A sense of humour.
- 17) Persistence.
- 18) Self confidence.
- 19) Diplomacy.
- 20) Maturity.
- 21) Assertiveness.
- 22) Value of professional growth.
- 23) A suitable business appearance.
- 24) Positive regard for self and others.
- 25) A recognition of one's own limitations.
- 26) Awareness of one's own needs, values, and beliefs.
- 27) A well developed support system.

These preliminary lists of EAP management tasks and traits provide a valuable foundation for the current study. They provide a basis on which a more detailed and thorough understanding of EAP management can be built.

## **Job Analysis Literature**

Having developed a beginning understanding of the tasks of employee assistance program management, the need exists to determine how best to build on this knowledge and further study the topic. A review of the job analysis literature is of value in designing such a study.

Job analysis is a systematic process of collecting, analyzing, organizing, and presenting data about the nature of jobs. It is used in the field of human resource management to examine the components of a job and provide a detailed description of the job and the human characteristics considered important to successful performance of the job.

Job analysis methods are designed to meet the purposes or objectives of the analysis and to collect the kind of data needed for that purpose. The type of information gathered, the means of gathering the information, and the source of the information varies according to the purpose of the study (Levine, 1983).

Information can be obtained through a variety of means including:

1) observation of workers; 2) interviewing individuals; 3) interviewing groups; 4) questionnaires; 5) diaries; 6) equipment based methods; 7) doing the work; 8) reviewing literature; and 9) any combination of these means. Sources of information can include: 1) the job holder; 2) the immediate supervisor; 3) a high level executive or manager; 4) an organizational training specialist; 5) clients or customers; and 6) members of other units or departments within the organization (Levine, 1983).

Job analysis provides information for a multitude of purposes. For places of employment, job analysis provides useful information for personnel recruitment and selection, training and development, job design, personnel utilization, compensation, and the establishment of lines of responsibility and communication. Government agencies use the information in dealing with issues of occupational standards, licensing, and human rights. Individuals find the information useful in vocational selection and preparation. Unions utilize job analysis information for purposes of compensation, pay equity, health and safety issues, job design, and manpower issues. Behavioral, sociological, and demographic research purposes are also met with information provided through job analysis (McCormick, 1979).

Job analysis methods can be classified into two major categories according to the purpose of the job study. The first category consists of those methods that focus on examining the components of the job including what tasks are performed, for what purpose, and what is used to accomplish the tasks. This is referred to as the job oriented or task oriented approach. The second category consists of those methods that focus on the human behaviours and characteristics necessary to perform the job under study. This is referred to as the worker oriented approach (Levine, 1983; Schneider and Schmitt, 1986; Milkovich, Glueck, Barth, and McShane, 1988).

Functional job analysis, developed by Sidney Fine, is one example of a task oriented approach to job analysis. Functional job analysis gathers information by reviewing existing materials concerning the job, observing workers, and interviewing job holders and their supervisors. The type of information gathered in this method relates to: 1) the job actions performed; 2) the immediate objective of the work; 3) the tools, equipment, or aids used in the job; and 4) the type of instruction received. It focuses on the dynamics of the interaction between work, worker, and the work organization and examines the interactions of the worker with data, people and things (Fine and Wiley, 1971; Fine, 1974). Functional job analysis describes and rates the level

of involvement of each job with data, people, and things, and the percentage of time spent in interaction with each (Schneider and Schmitt, 1986). Very detailed and explicit task statements are produced using this method of job analysis thereby yielding a thorough understanding of the job.

A task inventory, developed by Raymond Christal and the U. S. Department of Labour, is another example of a task oriented job analysis method. Using pre-established lists of tasks, job holders or supervisors are asked to rate each task according to such criteria as: 1) the importance of the task to the job; 2) the degree to which the task is part of the job; 3) whether or not specified tasks are a part of the job; 4) how often the task is performed; 5) the time spent on the task; 6) complexity of the task; 7) how difficult the task is to learn; 8) how difficult it is to perform the task; and 9) satisfaction obtained from performing the task (McCormick, 1979). Because job tasks vary, task inventories must be developed separately for each occupational area. The development of a task inventory involves: 1) reviewing materials that describe the job; 2) requesting lists of task statements from job holders; 3) developing a preliminary inventory with major duty areas and several tasks identified; 4) having several job experts review and edit the preliminary inventory and add missing tasks; and 5) constructing a final inventory with an



open ended question asking job holders to add any task statements that have been missed (Ghorpade, 1988). The primary use of task inventories is in training curriculum development, which is consistent with the purpose of this study.

The job element approach developed by E. S. Primoff is a worker oriented approach to job analysis. It focuses on worker traits, or elements, referred to as knowledge, skills, abilities, and other personal characteristics. It utilizes small group sessions of job holders or immediate supervisors to generate a comprehensive list of knowledge, skills, abilities and other characteristics necessary to perform the job. The identified traits are then developed into a questionnaire and job holders and/or supervisors are asked to rate the elements according to four scales: 1) the proportion of barely acceptable workers possessing the trait; 2) the importance of the element in separating truly superior workers from average workers; 3) the extent of trouble likely if the trait is ignored in the selection of workers; and 4) how practical it is to expect workers to possess the element (Levine, 1983). This method of job analysis yields information useful for selection and training purposes. Levine's 1983 comparative study of seven job analysis methods concluded that the job element approach is one of the best methods for establishing the human

characteristics necessary for successful job performance.

The critical incidents technique developed by John C. Flanagan is a second worker oriented approach to job analysis. In this approach, information is gathered on the critical incidents of a job. Ghorpade (1988) describes a critical incident as "a complete, observable human activity performed to accomplish an identifiable purpose with definite consequences" (Ghorpade, 1988, p. 65). Incidents are identified through interviews with supervisors, job holders, or others familiar with the job, and/or through observation of workers. They reflect actual past occurrences of on the job behaviour. Using group sessions, the identified incidents are translated into behavioral elements expressed in terms of knowledge, skills, abilities, and other personal characteristics. Although this approach provides a realistic basis for inferring the human traits deemed critical to the job, its purpose is to gather information relevant to the development of performance appraisal scales, which is not the purpose of this study.

The ability requirements scales, developed by E. A. Fleishman, is an example of a worker oriented job analysis system which utilizes pre-established inventories of traits. Fleishman developed an extensive list and description of

over 50 physical abilities and traits. Using this method, job holders, supervisors, or others knowledgeable of the job are asked to rate the amount of each ability required to perform the job. (Levine, 1983). The ability requirement scales, although comprehensive and frequently used, relate to physical abilities and are not applicable to management jobs.

To accomplish the goals of this study, a combination of techniques from a number of job analysis methods was used. Developing a unique combination of methods to meet the purpose of the study is frequently done. Whether choosing a pre-established method of job analysis or developing a unique approach, four factors need to be considered: 1) the nature of the job being analyzed (Berenson and Ruhnke, 1967); 2) the purpose of the analysis (McCormick, 1979; Levine, 1983); 3) the kind of data needed for the analysis (Levine, 1983); and 4) practical concerns of cost, time, sample size, respondent and user acceptability, and the number of jobs to be analyzed (Levine, 1983).

The importance of the context in which the job exists is recognized by job analysts (Schneider and Schmitt, 1986; Ghorpade, 1988). It is therefore imperative that this study not overlook the context of the employee assistance program management job in the design of the study.

## CHAPTER III

### Research Design and Methodology

#### **Introduction**

This study was designed to meet the purposes of exploring and describing the personal characteristics important to the management of internal, broad-brush employee assistance programs. The research design consisted of a combination of techniques extrapolated from Sidney Fine's Functional Job Analysis, Raymond Christal's approach to developing task inventories, and E. S. Primoff's Job Element Approach to job analysis. The techniques chosen facilitate the gathering of the data necessary for the study as well as satisfy the practical constraints of the study. The study consists of three phases of research. The first phase was an analysis of the EAP management job. The second phase was the identification of EAP management traits. The third, and final phase, explored the importance of the traits and the amount of each trait required to adequately perform the tasks of the job.

Since this study involved human participants, the research design

included careful consideration of ethical issues. Particular attention was given to protecting the anonymity of participants, maintaining confidentiality, and safeguarding of individual responses. The design of this study was reviewed and approved by the University of Manitoba, Faculty of Social Work's Ethics Review Committee.

## **Phase I - Job Task Analysis**

### **Introduction**

The first phase of the study consisted of an analysis of the employee assistance program manager's job. Fine's functional job analysis stresses the importance of obtaining thorough and detailed information about the job under study as a necessary basis to identifying the traits workers must possess to perform the job. This phase consisted of four steps designed to generate a comprehensive list of management tasks performed in internal, broad-brush employee assistance programs.

### Step 1 - Review Of Source Material

The first step in this phase of the study was to review all available source material. The relevant business management, human service administration, and employee assistance literature, as well as job descriptions and program reports were reviewed. This is typically the first step in the job analysis process utilized by those employing Sidney Fine's functional job analysis techniques and Raymond Christal's process of developing task inventories (Ghorpade, 1988). This literature review served two purposes: 1) it provided an opportunity for the researcher to develop an initial understanding of EAP management, and 2) it provided a basis for developing a preliminary list of job tasks.

### Step 2 - Development of a Preliminary List Of Job Tasks

The second step in this phase of the research was based on Raymond Christal's process of developing task inventories as described by Ghorpade (1988) and Sidney Fine's functional job analysis (Fine and Wiley, 1971). In this step, a preliminary list of job tasks was developed. The advantages of

developing a preliminary task inventory were two-fold. First, it facilitated the enhancement of the researcher's understanding and conceptualization of employee assistance program management. Second, it utilized available information to begin the process of developing a thorough list of the job tasks of EAP management. Pre-established lists of tasks exist for many jobs, but since a task inventory specific to employee assistance program management does not exist, one needed to be developed. The amount of detail generally found in task inventories was not necessary for the purposes of this study.

Based on the detailed review of existing source material, a multitude of employee assistance program management tasks were identified and a number of task groupings emerged. These identified tasks were scrutinized, duplicates were eliminated, those appearing to be of similar content were synthesized where appropriate, and clear, distinct task statements were written. These task statements were then organized into five categories according to the natural groupings that emerged from the literature review: 1) tasks related to interacting with the organization; 2) supervisory and human resource management tasks; 3) administrative tasks; 4) information gathering and disseminating tasks; and 5) tasks related to overseeing an employee assistance program.

The task statements developed from this research do not contain the level of detail found in the task statements of functional job analysis. Formal task statements used in functional job analysis contain information concerning the action performed, the immediate objective of the action, the tools, equipment, and aids used in the task, and the type of instruction received (Fine and Wiley, 1971). This amount of detail was unnecessary for the purposes of the study and beyond its practical limitations.

This step of the research yielded a list of 53 employee assistance program management tasks. The identified tasks are listed in the preceding chapter beginning on page 64.

### Step 3 - Individual Interviews with Job Holders

#### (a) Method

The third step in the study of the job tasks performed by employee assistance program managers consisted of individual interviews with current job holders. The purpose of this step was to gather the required information to



develop a comprehensive list of job tasks as a basis for understanding the human traits important to the job.

The individual interview is frequently used in the process of job analysis to gather information about the tasks of the job under study. It was chosen as the means of gathering information on the EAP management job for a number of reasons. First, the nature of the job influenced this choice. According to the U. S. Department of Labour (1972), the individual interview is considered most appropriate when the job under study "does not consist of a set sequence of tasks and the nature of the work is complex and protracted" (U.S. Department of Labour, 1972, p. 14). These conditions hold true for the job of the EAP manager. Second, the personal interaction of the interview was felt to be an advantage in setting the stage for the involvement of these people in further phases of the study. Third, the scheduling of the individual interview at a date, time, and location convenient to the informant was believed to increase the likelihood of participation. Fourth, the direct contact with job holders necessary to schedule the interview provided the opportunity to ensure an appropriate sized sample in that where respondents chose not to participate, others could be selected in their place. Finally, it was felt the interview process would yield the most accurate and detailed information over other

options such as a checklist based on the preliminary list of tasks, a questionnaire, or diary. Observation of the work was not practical given the nature of the job.

(b) Sample

Current job holders were chosen as the source of information over other alternatives such as immediate supervisors, high level executives, clients, organizational specialists, and members of other departments within the organization for two reasons. First, because of the independent nature of the work of the EAP manager, it was believed that the job holder her/himself would be in the best position to provide the type of information required for the study. Second, the likelihood of participation of current job holders was believed to be greater than other sources of information as these people would have the most to gain from the study.

Individual interviews were held with four managers of local internal, broad-brush employee assistance programs. This sample size was chosen on the basis of Levine (1983) 's recommendation of interviewing 4 to 6 people and stopping the process when a substantial number of new tasks are no longer

being generated. The lower number of recommended interviews was chosen on the belief that it would provide adequate representation of the limited population of 9 local programs meeting the criteria of the study. Only local Winnipeg programs were included in the population for practical reasons. The researcher was prepared to add to the sample size if new tasks were continuing to be generated at the conclusion of the fourth interview, however, this was not necessary.

A list of managers of EAPs meeting the criteria of the study was obtained from the provincial employee assistance professional association. As previously noted, this population included 9 programs. Four programs were randomly selected using the computer program Lotus 1-2-3. Those selected by this process were sent a letter outlining the purpose and design of the study and inviting their participation in this step of the research (Appendix 1). Approximately 1 week after sending the letters, a follow-up telephone call was made to each potential participant. A pre-established format was used for the telephone contact to assure standardized information was provided to each potential participant about the study and their role in the research. (Appendix 2). The purpose of the telephone call was to assure receipt of the letter of invitation, address any questions or concerns, determine whether the manager

was willing to participate in this step of the research, and if so, to schedule an interview date, time, and location.

All of those contacted agreed to participate in this step of the study. All confirmed that they were managers of internal programs providing a wide spectrum of services for a variety of needs. Each of the 4 participants worked in programs that provided assessment, counselling, referral, follow-up to referral, and consultation on organizational change. Three of the 4 programs also provided group education services, and 2 of the programs provided health promotion services as well. Other services identified included mediation, diffusing of workplace tensions, and critical incident debriefing. Employee involvement in all of the programs was totally voluntary.

Industries in which the programs existed included health care, communications, education, and government. Half of the organizations in which the programs existed employed between 4001 and 5000 employees, while the other half employed over 5000 people. The average percentage of male employees in the organizations was 40%. The percentage of male employees ranged from 30% to 50%, while the percentage of females ranged from 50% to 70%. The mean percentage of employees belonging to labour

unions was 89%, with the range being from 75% to 100%.

The average total number of staff positions in the programs was 3.75 with a range of 1.5 to 7. Of these positions, the mean number of management positions was .48, the mean number of clinical positions was 2.69, and the mean number of clerical positions was .67. The number of management positions ranged from 0.1 to 1.0, the number of clinical positions ranged from 1.1 to 5.0, and the number of clerical positions ranged from 0.3 to 1.

The average number of years the EAPs had been operating was 13.75 with a range of 10 to 18. Three of the 4 participants spent less than 50% of their time performing management tasks. One manager was directly accountable to the chief executive officer of the organization, 1 was directly accountable to the manager of human resources, and 2 were directly responsible to joint management/union committees.

The gender ratio of female and male participants was equal. The professional background of 3 of the participants was social work, while 1 had an educational psychology background. The minimum level of formal education was a Masters degree. The average length of EAP management

experience was 9.25 years with a range of 4 to 16 years.

(c) Instrument

The interviews followed a semi-structured interview format (Appendix 3). This type of format was chosen as it provides a basic structure for the interview while allowing the interviewer to adapt to the circumstances and information gained from the questioning (McCormick, 1979). This balance of structure and flexibility was deemed important in gathering the type of information required for the study. Although the effectiveness of such a method depends largely on the skill of the interviewer (Berenson and Ruhnke, 1974), this was not considered a limitation as the researcher in this case had over 15 years professional interviewing experience.

Prior to beginning to explore the job, participants were provided with standardized introductory information. The purpose and importance of the study were reviewed, the format of questioning was outlined, confidentiality and anonymity were assured, reminders were given that participants did not have to answer any questions they did not feel comfortable answering, and

participants were advised they could stop the interview at any time. Questions and concerns were called for and addressed. Written consent for participation was obtained using a specifically designed participant consent form (Appendix 4) aimed at assuring the participant and researcher agreed on specific, important details of the study concerning confidentiality, anonymity, voluntary involvement, and availability of study findings.

The first group of questions focused on gathering information on the characteristics of the program and organization in which the manager's job existed and on the personal characteristics of the participant. Questions related to the characteristics of the EAP in which the participant worked included: 1) whether or not the program was an internal program; 2) the types of services provided; 3) whether employee involvement in the program was voluntary in all cases; 4) the number of staff positions in the program; 5) the number of years the program had been operating; 6) and to whom the program manager was directly accountable. Questions related to the characteristics of the organization included: 1) the type of industry in which the program existed; 2) the number of people employed by the organization; 3) the gender distribution of employees; and 4) the percentage of employees belonging to unions. Questions related to the personal characteristics of the respondent included: 1)

gender; 2) professional background; 3) level of formal education; and 4) years of EAP management experience. These questions were developed in order to facilitate a description of respondents and the programs in which they work.

The second group of questions focused on gathering information about the job tasks performed by managers of internal, broad-brush EAPs. Using the semi-structured format, participants were asked general questions about what they spend the majority of their time doing, as well as what tasks they perform on a daily and weekly basis. In order to guard against the omission of tasks performed less frequently, participants were asked to identify tasks performed on a monthly basis as well as those performed at other intervals such as quarterly, semi-annually, and annually. Questions such as "what do you do to accomplish this?" and "how is this done?" were asked in order to break down broad categories of duty into specific tasks. Prompts such as "what else do you do?" were used to facilitate the flow of information.

Participants were asked about the amount and type of supervision they receive on the job. This question was aimed at gathering information about some of the personal characteristics which may be required in order to adequately carry out the job responsibilities.



Questions were asked about the stressors faced on the job. Participants were asked the general question "what kind of stressors are you faced with on the job?". If not mentioned, participants were asked specifically about such potential stressors as time, quantity of work, isolation, dealing with other professional backgrounds, limited resources, policy issues, reporting mechanisms, demands for breach of confidentiality, and labour/management problems. These prompts were based on Groeper, Burt, Finney, and Upchurch (1984) 's identification of EAP job demands.

Questions related to where participants carry out their responsibilities were asked. The purpose of this questioning was to gather information about the settings in which the work is carried out and to further identify personal characteristics required as they relate to various settings.

Participants were also asked what kind of contact they have with others within the program, within the organization, and within the external community. The rationale for this question stems from the recognition that the work of the EAP manager is conducted in interaction with a multitude of systems within and outside of the organization (Ford and Ford, 1986).

Finally, participants were asked specific questions about tasks identified in the preliminary task list which they had not yet mentioned.

Interview techniques of active listening and paraphrasing were frequently used in order to encourage the participant to continue to elaborate and to check that information had been accurately understood by the analyst.

The individual interviews lasted an average of 2.75 hours and ranged from 2.25 to 3.25 hours in length. Extensive and detailed notes were taken during each interview. The interviews were conducted over a 10 day period, both for the convenience of the participants and to allow the analyst the opportunity to organize data obtained from each interview.

#### Step 4 - Development of a Comprehensive List of Job Tasks

The fourth and final step in this stage of the study was to develop a comprehensive list of employee assistance program management tasks. Data obtained from the interviews was synthesized, analyzed, and organized. Building on the preliminary list of task statements by editing, adding, and eliminating tasks on the basis of data obtained from the interview process, a

comprehensive list of tasks was developed. Levine (1983) suggests that each job generally contains from 30 to 100 tasks. This process yielded a list of 100 tasks.

The data obtained from the interviews provided a finer level of specificity to many tasks identified in the literature as well as yielding some additional tasks. Tasks relating to interactions with others in the organization were expanded upon to include: 1) acting as a resource in the organization; 2) providing various forms of consultation; 3) collaborating with other internal personnel; 4) building, maintaining and restoring relationships with others in the organization; 5) participating on committees; and 6) responding to requests made by others. Additional detail related to supervisory and human resource tasks included: 1) assigning and monitoring work; 2) acting as a link, and as necessary, a buffer between EAP and the larger organization; and 3) tasks related to interactions with program staff including orientating new staff to the program and organization, providing feedback, empowering and supporting. Additions and changes to the identified administrative tasks related to managing time, coping with stress, and self improvement. Information gathering and disseminating tasks were expanded and specified to include: 1) tasks related to identifying and accessing sources of relevant information both

within the organization and the external environment; 2) assessing the importance of information; 3) developing, implementing and evaluating mechanisms for gathering information related to service needs and program utilization; and 4) overseeing the gathering, synthesis, analysis, and dissemination of information related to service needs and program utilization. Additional and newly specified tasks related to overseeing an employee assistance program pertained primarily to increasing program utilization. These tasks included: 1) working to enhance the program by identifying areas of weakness and identifying, implementing, and evaluating alternatives; 2) identifying and working to reduce barriers to program utilization; and 3) working to increase employees' comfort and confidence in utilizing the program.

The following list is the result of the integration of data obtained from the literature review and the interviews with current program managers.

## Comprehensive List of Employee Assistance Program Management Tasks

### Interacting With The Organization

- 1) Works within the context of a larger organization with understanding of the goals, values, culture, political environment, written and unwritten policies, and the formal and informal power structures of the setting.
- 2) Works effectively with both management and labour representatives at all levels, and is cognizant of the rights and issues of each group.
- 3) Understands the life stressors and special issues confronting various populations in the workplace.
- 4) Identifies actual and potential workplace issues impacting the psychosocial needs of employees by monitoring organizational operations and plans.
- 5) Acts as a resource to the organization in identifying and responding to occupational and workplace stressors.
- 6) Provides consultation on the development and review of workplace plans and policies on relevant issues such as sexual harassment and downsizing.
- 7) Collaborates with other departments within the organization in

developing and offering of programs for employees, such as retirement planning, smoking cessation, and physical fitness.

- 8) Identifies, accesses, and utilizes key personnel in the organization to accomplish program goals and/or resolve individual or systemic concerns.
- 9) Develops and maintains a working relationship with all levels of personnel in all departments within the organization.
- 10) Works to restore any damaged relationships between EAP staff and members of the larger organization.
- 11) Demonstrates the ongoing value of EAP initiatives to decision makers.
- 12) Ensures that the critical nature of key EAP components, such as confidentiality and accessibility, is understood throughout the organization.
- 13) Works as a competent and professional member of the organization.
- 14) Upholds humanistic and wellness values within the organization and communicates these values to decision makers.
- 15) Participates on committees within the organization and provides a humanistic and systemic perspective to issues.
- 16) Responds to requests by organizational personnel for consultation about their role in assisting individual employees about whom they are

concerned.

### Supervisory And Human Resource Management Tasks

- 1) Recruits and selects appropriate staff for the EAP independently or in consultation with others.
- 2) Orients new EAP staff, or arranges for the orientation of program staff, to all aspects of the EAP and the larger organization.
- 3) Supervises program staff, both clinical and clerical, in the performance of duties.
- 4) Evaluates performance of all program staff.
- 5) Provides staff with feedback about their job performance.
- 6) Deals with performance issues and engages in disciplinary action and termination of staff as appropriate.
- 7) In consultation with program staff, assesses the professional development needs of staff and identifies the most effective and efficient means of meeting these needs.
- 8) Works to broaden the perspectives of each staff member and to facilitate professional growth and development through such avenues as regular

clinical supervision, peer consultation, case discussions, and assuring the availability of appropriate professional journals.

- 9) Assists staff in applying newly learned knowledge and skills.
- 10) Acts as a clinical consultant and engages in co-therapy as appropriate.
- 11) Empowers and supports staff.
- 12) Engages in problem solving with staff in their dealing with difficult situations.
- 13) Advocates on behalf of staff members on issues relating to pay, promotion, leave, etc. as appropriate.
- 14) Provides follow through to issues and concerns raised by program staff.
- 15) Demonstrates sensitivity toward the individuality of staff members and motivating factors for these individuals.
- 16) Develops and maintains a work climate conducive to employee growth, quality performance, and the achievement of program goals and objectives.
- 17) Facilitates communication among EAP staff.
- 18) Assigns job tasks, monitors workloads and utilization of staff time, and makes adjustments as necessary.
- 19) Assesses requests for vacation, professional development, leaves, etc., and exercises ultimate decision making authority in the best interest of



individual program staff, the EAP and the larger organization.

- 20) Acts as a buffer between program staff and the larger organization as appropriate.

### Administrative Duties

- 1) Assumes responsibility for the operation of the EAP and subsequent accountability.
- 2) Engages in all aspects of program planning including defining goals and measurable objectives, determining the best available means of achieving identified goals and objectives, implementing, monitoring and evaluating plans to assure the realization of objectives. These tasks are carried out taking into account organizational philosophy and realities, as well as initiatives of other departments.
- 3) Assures the goals and objectives of the program are achieved.
- 4) Makes decisions about the operation of the program and sees that they are carried out.
- 5) Performs general administrative duties such as scheduling of staff for on call services and vacation coverage and scheduling meetings.
- 6) Carries out all aspects of budgeting for the EAP including identifying

resource requirements, identifying sources of revenue, planning, negotiating for resources, administering, monitoring, and adjusting.

- 7) Oversees the daily routine of the office.
- 8) Deals with practical office issues such as space, rent, furnishings, equipment, etc.
- 9) Identifies, analyzes and responds to actual and potential problems.
- 10) Establishes priorities congruent with identified goals and objectives.
- 11) Manages time efficiently.
- 12) Delegates tasks as appropriate.
- 13) Works effectively and efficiently with little supervision and/or direction.
- 14) Seeks direction from key organizational personnel as required.
- 15) Represents the EAP at meetings within the organization.
- 16) Represents the EAP at significant milestone events, such as retirements, and at significant social events.
- 17) Deals with complaints and concerns expressed by service users.
- 18) Performs work tasks on personal time as required.
- 19) Travels within and beyond the city as required.
- 20) Copes effectively with stress.
- 21) Deals effectively and efficiently with fluctuating work flow, including periods of high volume of work.

- 22) Engages in ongoing self-evaluation in order to enhance personal effectiveness.
- 23) Establishes and achieves personal learning objectives.

#### Information Gathering and Disseminating Tasks

- 1) Identifies and accesses sources of relevant information.
- 2) Gathers relevant information, both formally and informally, from within the EAP, the larger organizational context, and the external environment.
- 3) Assesses information to determine its degree of importance.
- 4) Facilitates the flow of information between the larger organization, the EAP, and the advisory committee.
- 5) Disseminates information within the EAP.
- 6) Facilitates the sharing of relevant information among EAP staff.
- 7) Schedules meetings, establishes agendas, and chairs meetings to gather and disseminate information within the EAP and relevant committees.
- 8) Provides relevant information to upper management, union representatives, advisory committee members, subordinates, other internal departments, employees, professional associations, and external

organizations in written and oral form.

- 9) Responds to questions and misunderstandings relating to any aspect of the program.
- 10) Develops, implements and evaluates mechanisms for gathering information on the needs and demands for program services, service utilization, and client satisfaction.
- 11) Oversees the gathering, synthesis, analysis, and dissemination of relevant program statistics.
- 12) Publicizes and promotes EAP services through such avenues as articles in workplace and union newsletters, brochures, pay envelop stuffers, mail-outs, videos, and reports published in the organization's annual report.
- 13) Informs new employees of EAP services through participation in new employee orientation programs.
- 14) Conducts information sessions for the workplace on all aspects of the program and/or identified topics of interest.
- 15) With employee consent, communicates with significant personnel within the organization or external service providers, in the best interest of individual employees and/or groups of employees.
- 16) Responds to requests from external organizations for information on

program services and operational details.

- 17) Interacts with other employee assistance programs to obtain and provide relevant information.

### Overseeing An Employee Assistance Program

- 1) Identifies employee needs, identifies potential alternatives to responding to these needs, decides on the best available option, implements the plans, and evaluates their effectiveness.
- 2) Provides, or arranges for the provision, of individual or group intervention as appropriate.
- 3) Identifies and accesses community resources responsive to identified employee needs.
- 4) Arranges for the provision of special services (ie: French language, medical services, and specialized clinical services) by external resources.
- 5) Gathers client feedback on external services to which referrals have been provided (ie: financial, legal and medical services as well as groups such as grieving and parenting).
- 6) Ensures that key EAP components are incorporated and maintained in the program, including confidentiality and accessibility.

- 7) Works to enhance the program by identifying areas of weakness, identifying potential alternatives, choosing the best possible alternative, implementing the change, and evaluating its effectiveness.
- 8) Identifies and works to reduce barriers to program utilization.
- 9) Works to increase employees' comfort and confidence in utilizing the program.
- 10) Responds to crises with individuals and in the workplace.
- 11) Works toward the development of community resources appropriate to the needs of employees of the organization.
- 12) Maintains a current supply of brochures on relevant topics and community resources for distribution to employees.
- 13) On an ongoing basis, obtains informal feedback from employees on their level of satisfaction with EAP services.
- 14) Develops, implements, reviews and modifies formal processes for evaluation of all aspects of the EAP.
- 15) Recruits, trains, supports and empowers advisory committee members.
- 16) Networks within the EAP community to problem solve and to identify current issues and directions.
- 17) Promotes visibility of the program through interaction with employees at all levels of the organization.

- 18) Fosters the visibility of the program in relevant external communities.
- 19) Keeps abreast of current issues and developments in the field of employee assistance as well as topics relevant to the workplace and identifies ways to practice new concepts.
- 20) Understands the role of work and the workplace in people's lives.
- 21) Develops, reviews, modifies, and distributes program promotion material including brochures, posters, and mail-out information.
- 22) Acts as a resource to students and researchers in related professional fields.
- 23) Acts as a neutral party in the assessment of workplace concerns and provides appropriate recommendations.
- 24) Empowers employees.

A final check of the accuracy and thoroughness of this list of tasks was undertaken during the group focus session in the next phase of the study.

In appreciation of their involvement in this phase of the research, each participant was provided with the list of tasks generated by them only, as well as a copy of the comprehensive list of tasks developed by pooling the information gained from all four interviews. An individual participant's list of

tasks was made available only to her/him. No participant was provided with data obtained in interviews with any other participant. Following the compilation of the data obtained from the interviews, individual data was destroyed.

### Limitations

Limitations of this phase of the study lie in the ability to generalize from the tasks identified by the 4 participants. Although the participants were randomly selected, they represented only one geographic location, managers who are the sole members of their EAP staff were not represented, organizations with less than 4001 employees were not represented, only well established programs that had been in operation for a minimum of 10 years were represented, and the majority of participants were of the same professional background, that of social work. It is hoped, having based this list on a thorough review of the literature, that the limitations of the sample had a minimal effect, however, this is unknown.



## Summary

The purpose of the first phase of the study was to explore and describe the job tasks of employee assistance program management in internal, broad-brush programs. In order to accomplish this a number of steps were followed: 1) the general management, human service administration, and employee assistance literature was reviewed; 2) a preliminary list of job tasks was developed on the basis of the literature; 3) individual interviews were held with a random sample of 4 managers to gather more detailed and extensive information on the job; and 4) data obtained was synthesized and organized to develop a comprehensive list of EAP management tasks. The primary limitation of this phase of study lies in the generalizability of identified tasks to the wide spectrum of internal, broad-brush employee assistance program management.

## **Phase II - Identification of EAP Management Traits**

### **Introduction**

The purpose of the second phase of the study was to explore and describe the human traits relevant to the performance of EAP management job tasks. This phase consisted of four steps: 1) a review of the existing source material; 2) the development of a preliminary list of human traits relevant to EAP management; 3) a group focus session to generate additional relevant traits; and 4) the development of a comprehensive list of knowledge, skills, abilities, and other personal characteristics required to perform the tasks of EAP management.

### **Step 1 - Review of Source Material**

The first step in this phase of the study followed the same rationale and procedures as the first step of the job task analysis phase. The business management, human service administration, and employee assistance literature was reviewed as was curriculum information from colleges and universities

offering specific employee assistance training. This review provided a foundation on which to explore the topic of the human characteristics required to carry out the tasks of employee assistance program management.

### Step 2 - Development of a Preliminary List of EAP Management Traits

The second step of this phase of the research built on the first. The data obtained from the review of the relevant source material was synthesized and organized into a preliminary list of knowledge, skills, abilities, and other personal characteristics important to EAP management in a similar process to that utilized in the development of the task list. The identified traits are listed in the previous chapter beginning on page 71.

Developing such a list was a logical use of the available data. This list provided a useful check for potentially overlooked traits during the group focus session of the next step.

### Step 3 - Group Focus Session With EAP Managers

#### (a) Method

The third step in the study of the human traits required to perform the tasks of employee assistance program management consisted of a group focus session attended by 4 managers of internal, broad-brush EAPs. The purpose of this step was to generate a list of personal characteristics necessary to carry out the job tasks identified in the previous phase of the research. This was a necessary step as a standardized trait inventory appropriate to employee assistance program management does not exist.

The technique of utilizing a group focus session to generate relevant job traits is used in E. S. Primoff's job element approach to job analysis. This method of obtaining information was chosen for a number of reasons. First, this technique is recognized as a highly effective means of gathering the type of data required for the purposes of this study (Levine, 1983), superior to such options as checklists or questionnaires. Second, the advantages of a group to the brainstorming process are well recognized. Third, the use of a group session rather than a series of individual interviews addressed the practical

concern of use of time.

Prior to the focus session, participants were provided with the comprehensive list of EAP management tasks developed in the previous phase of research. This was to enable them to familiarize themselves with the identified tasks in preparation for discussing the traits necessary to perform the tasks as well as to provide them with an opportunity to amend the list if desired. This list was used by each participant for reference during the focus session.

Formal written consent for participation in the study was obtained prior to the meeting, using the same participant consent form utilized previously in the study (Appendix 4). Descriptive data relating to characteristics of the programs in which the managers worked, characteristics of the organization in which the program existed, and personal characteristics of the participants was obtained using the same questions as were utilized in the individual interview process (Appendix 3). The purpose of obtaining this data was to provide a basis for describing the participants and the programs and organizations in which they worked.

The focus session began with a request for any amendments to the task list. No amendments were made, however. Prior to brainstorming, definitions of the trait categories were provided as follows: knowledge as the awareness and understanding of particular technical material, skill as the performance of certain tasks utilizing particular techniques, ability as the physical and mental capacities to perform certain tasks, and other personal characteristics as personality traits, interests, and motivational attributes (Levine, 1983; Schneider and Schmitt, 1986).

The group was asked to identify the knowledge, skills, abilities, and other personal characteristics required to perform the listed job tasks. As traits were generated they were written on flip chart paper and placed on the walls of the room for reference. Probing questions such as "is anything else needed to do this task?" and "what specifically do you need?" were asked. Clarification of similar sounding traits was obtained. Paraphrasing and active listening techniques were utilized.

All tasks identified on the comprehensive list were discussed and traits relating to all of them were generated. Participants were questioned about traits identified on the preliminary list but not identified in the brainstorming

and responses were noted. The group felt the process was complete after 4 hours.

(b) Sample

As in the first phase of research, current job holders were chosen as the source of information in the process of identifying the human traits necessary to perform EAP management tasks. These people were seen as the most suitable source of information given their first hand knowledge of the job. It was believed, therefore, that they would be in the best position to provide the accurate and detailed information required for the study. Further, as in the first phase of study, it was believed that job holders themselves would be most willing to participate in this process as they would have the most to gain from it.

The group of people brought together to generate a list of the human traits important to EAP management tasks consisted of 4 managers of local, internal, broad-brush employee assistance programs. Out of courtesy, and in light of their previous willingness to participate in the study, the 4 managers who participated in the first phase of the study were invited to participate in

this step. Two of these people agreed to participate, while the other 2 were unable due to scheduling difficulties.

Letters of invitation to participate in this step of the study (Appendix 5) were sent to all remaining managers of internal, broad-brush EAPs in the original population of 9. Five such letters were sent.

Approximately 1 week following the mailing of these letters, a follow-up telephone call was made to the potential participants (Appendix 6). The format of this call was pre-established in order to assure standardized information was provided to all potential participants. The purpose of the call was to assure receipt of the letter, address any questions or concerns, determine the recipient's willingness to participate in this step of the study, and if so, to schedule a date, time, and location for the group session. Two of these managers were willing and able to participate, bringing the size of the group to a total of 4.

All participants confirmed that they were managers of internal, broad-brush employee assistance programs. All programs in which the managers worked provided assessment, counselling, referral, follow-up to referral, and



consultation on organizational change, while 3 of the 4 also provided group education and 2 provided health promotion services. Other services identified as being provided by these programs were critical incident debriefing and mediation of workplace conflict. Employee involvement in these programs was totally voluntary in all cases. The average length of time the programs had been operating was 14 years with a range of 8 to 18 years. The average number of staff positions in the programs was 3.72 with a range of 1.5 to 7. The mean number of management positions was 0.61 with a range of 0.5 to 1, the mean number of clinical positions was 2.67 with a range of 1 to 5, and the mean number of clerical positions was 0.8 with a range of 0.4 to 1.

Industries represented by participants included health care, communications, and government. Two of the 4 managers worked in organizations employing over 5,000 people, 1 worked in an organization of 4,001 to 5,000 people, and 1 worked in an organization of 3,001 to 4,000 employees. The average percentage of males in the workplace was 45% with a range of 15% to 75%. Approximately 95.5% of employees in the represented organizations belonged to labour unions with the range of distribution between 88% and 99%.

One of the participants was directly accountable to the manager of human resources, 1 to the manager of occupational health, and 2 to joint management/union committees. The gender ratio of participants was equal. The professional background of 3 of the participants was social work, and 1 was reported as "other". All participants had a Masters degree in their field. The mean number of years as EAP managers was 7.5 with a range of 3.5 to 16.

#### Step 4 - Development of a Comprehensive List of EAP Management Traits

The final step in the process of identifying the knowledge, skills, abilities, and other characteristics required to perform the management tasks of internal, broad-brush employee assistance programs was to compile a comprehensive list of traits. This was accomplished by editing the data obtained. The traits were written in a clear and unambiguous manner. A comprehensive list of 96 traits was developed. Participants in the study received a copy of the list of traits in appreciation of their participation.

## Comprehensive List OF EAP Management Traits

### Knowledge

- 1) Knowledge of the formal decision making process of the organization in which the EAP exists. This includes knowledge of key personnel and their formal responsibilities.
- 2) Knowledge of the organization including history, philosophy, culture, rituals, goals, and values.
- 3) Knowledge of the labour unions within the organization including their role, history within the organization, and means of operating.
- 4) Knowledge of the role of the EAP within the organization, including the underlying assumptions, beliefs and values.
- 5) Knowledge of workplace stressors.
- 6) Knowledge of the demographics of the workplace and the issues facing the different subgroups.
- 7) Knowledge of the occupational/professional groups within the workplace including knowledge of their individual cultures and values, and the issues they face.
- 8) Knowledge of how to access relevant resources in the organization such

as occupational health staff, human resource staff, training programs and employee benefits.

- 9) Knowledge of how to promote and market the employee assistance program within the organization.
- 10) Knowledge of employee assistance professional ethics and values.
- 11) Knowledge of the role of work in people's lives.
- 12) Knowledge of organizational theory.
- 13) Knowledge of systems theory.
- 14) Knowledge of theories and styles of management.
- 15) Knowledge of human behaviour and motivation.
- 16) Knowledge of relevant clinical modalities.
- 17) Knowledge of the fields of psychology and sociology in the topics of:
  - a) crisis theory
  - b) life transitions
  - c) family dynamics
  - d) addictions
  - e) group dynamics
  - f) adult education theory
- 18) Knowledge of industrial relations.
- 19) Knowledge of where and how to recruit EAP staff.

- 20) Knowledge of the relevant resources available in the external environment.

### Skills

- 1) Interpersonal skills, particularly the ability to effectively interact with a wide variety of personalities using sensitivity, respect, empathy, diplomacy and tact.
- 2) Skills in recognizing people's strengths.
- 3) Skills in validating and re-enforcing people's use of their strengths.
- 4) Proficiency in providing constructive feedback, both positive and negative.
- 5) Skills in communicating orally with a wide variety of audiences.
- 6) Skills in communicating in written form using a variety of venues such as annual reports, company newsletters, brochures and letters.
- 7) Nonverbal communication skills: the ability to consciously express feelings using facial expressions, gestures and body language.
- 8) Active listening skills.
- 9) Skills in maintaining and utilizing confidential information.

- 10) Information gathering skills including identifying what information is needed, as well as accessing this information.
- 11) Assessment skills applied to individual and group needs.
- 12) Assessment skills applied to workplace needs.
- 13) Analytical skills: examining and evaluating information to identify process and content issues.
- 14) Decision making skills: identifying options for problem resolution, and choosing the best available alternative(s).
- 15) Planning skills: developing goals, short and long term objectives, methods and strategies.
- 16) Implementation skills: putting into place and carrying out action plans.
- 17) Evaluation skills: utilizing systemic means of evaluating the effectiveness and efficiency of program strategies and goals.
- 18) Clinical skills in:
  - a) crisis counselling
  - b) brief treatment
  - c) couples counselling
  - d) family counselling
- 19) Referral skills.
- 20) Follow-up skills.

- 21) Networking skills including seeking out, establishing and utilizing connections.
- 22) Teaching skills including explaining, demonstrating, and supervising practice. These skills may be applied to individual, small or large group education.
- 23) Public relations skills utilizing a positive and professional approach to achieve program goals and objectives.
- 24) Consultation skills.
- 25) Conflict management skills.
- 26) Time management skills including planning and organizing tasks to accomplish prioritized goals and delegating tasks as required.
- 27) Skills in managing stress.
- 28) Skills in setting boundaries and saying "no" when appropriate.
- 29) Leadership skills including empowering, influencing and motivating others.
- 30) Supervisory skills including determining and interpreting work procedures and assigning work duties.
- 31) Skills in establishing and maintaining a climate conducive to quality work.
- 32) Job analysis skills: the ability to clearly describe the needs of the

department, the required job tasks, and the professional and personal characteristics required to perform the job and fit into the department.

- 33) Employee selection skills: proficiency in developing mechanisms for gathering and rating information desired on job applicants.
- 34) Skills in obtaining necessary financial resources.
- 35) Budgeting skills: transforming goals and objectives into financial terms, monitoring expenditures, and taking corrective action as required.
- 36) Computer skills applied to the analyzing and disseminating of information.

### Abilities

- 1) The ability to be sensitive to and respectful of differences in individuals and groups.
- 2) The ability to conceptualize and think clearly.
- 3) The ability to predict potential outcomes of situations.
- 4) The ability to maintain a neutral and objective perspective.
- 5) The ability to focus on detail as well as to see the larger picture, and to move between the two as necessary.



- 6) The ability to learn from experience.
- 7) The ability to integrate life experience, theory and intuition.
- 8) The ability to accept and respond to both positive and negative feedback.

#### Other Personal Characteristics

- 1) A willingness to adhere to a set of professional values and ethics.
- 2) A professional presentation of self.
- 3) A self directed and self motivated approach to work.
- 4) A genuine interest in and commitment to the job.
- 5) Insight into one's own personal values, strengths, weaknesses, and learning needs.
- 6) A desire to learn.
- 7) Self confidence.
- 8) Assertiveness.
- 9) Patience.
- 10) Foresight.
- 11) A developed and reliable sense of intuition.
- 12) A sense of humour.

- 13) Tolerance for frustration and stress.
- 14) Perseverance.
- 15) Flexibility.
- 16) Credibility.
- 17) Creativity in problem solving.
- 18) An openness to new ideas and information.
- 19) Honesty.
- 20) A fair and consistent approach to people.
- 21) A willingness to take risks.
- 22) An established balance between personal and professional life.
- 23) Maturity.
- 24) Stability in life.

### Limitations

The primary limitation of this phase of the study lies in the ability to interpret this list of traits as complete and applicable to a wide spectrum of internal, broad-brush EAPs. Given the limited amount of time managers were able to give to this process it is possible that some important traits were

missed. Also, due to the limited demographics of respondents, the extent to which the identified traits can be generalized to a more diverse group is unknown. However, as this list of traits is based on a thorough review of the literature, it is hoped that the limitations are minimal.

### Summary

The purpose of this phase of the study was to explore and describe the human traits necessary to perform the job tasks of EAP management. These traits were defined in terms of knowledge, skills, abilities, and other personal characteristics. To this end four steps were followed: 1) the relevant literature was reviewed; 2) a preliminary list was developed; 3) a focus session was held with 4 program managers to brainstorm about the traits required; and 4) identified traits were compiled into a comprehensive list. The primary limitation of this phase of the study lies in the extent to which the generated list of traits is complete and applicable to the wide spectrum of internal, broad-brush employee assistance program management.

## **Phase III- Exploration of the Importance of the Identified Traits and the Amount of Each Trait Required**

### **Introduction**

The purpose of this phase of research was two-fold. First, it was designed to explore the level of importance and the amount required of the 96 human traits previously identified as important to EAP management. Second, it was designed to explore whether significant differences in ratings exist between subpopulations of program, organization, and respondent characteristics. This information is seen to be useful in establishing priorities for both selection and training of program managers.

This phase of the study consisted of two steps. In the first step, a questionnaire was developed on the basis of the previously identified management traits. In the second step, a mail-out survey was administered to managers of internal, broad-brush EAPs throughout most of the country.

## Step 1 - Development of the Questionnaire

The first step of this phase of the research process consisted of the development of a questionnaire (Appendix 6). Questionnaires are used in the job element approach to job analysis to rate identified worker traits according to particular criteria of interest. In this case, the criteria of interest were the level of importance of the traits and the amount of each trait necessary to adequately perform the tasks of the job.

The comprehensive list of EAP management traits developed in the previous phase of the study served as the basis of the questionnaire. Respondents were asked to rate the job traits using two scales: one scale to measure the level of importance attributed to each trait, and the second to rate the amount of each trait thought to be required to adequately perform the EAP management tasks. For consistency and ease of completion, 4 - point scales were developed for both criteria. Respondents were asked to use the first scale to indicate whether they believed the identified trait was of no importance to the job, minimal importance, moderate importance, or was critical to job performance. They were then asked to use the second scale to indicate whether they believed none of the trait was required, a minimal amount was

required, a moderate amount was required, or a great deal of the trait was required to adequately perform the job.

The inclusion of a number of scales, as is generally used in the job element approach, was considered. So doing would have allowed the level of importance and amount of trait required to be analyzed in relation to varying levels of job performance. However, it was thought that the increased time required to complete the questionnaire might have a negative effect on the response rate. In hopes of maximizing the response rate, the questionnaire was limited to the two chosen scales.

An open ended question asking respondents to identify any EAP management traits not identified in the study was included in the questionnaire. Underlying this question was the knowledge that despite every attempt to develop a comprehensive list, the list was unlikely to be exhaustive. The inclusion of the open ended question provided the opportunity to expand the list of important traits and provided a source of additional information for consideration in future studies.

Three subtle negative traits were included in the final category of traits

for two reasons. First, ratings of this final category, personal characteristics, could be affected by social desirability bias. Since this category deals with more subjective qualities, the risk of this type of bias is greater in this section than in the previous categories that focused on more objective characteristics. It was thought that the inclusion of negative traits would assist the researcher in assessing whether respondents tended to rate all characteristics in this category high. Second, since completing the questionnaire required a significant amount of time and thought, the inclusion of negative traits provided a check concerning the fatigue factor.

The questionnaire also contained a group of questions aimed at gathering information about respondents and the programs and organizations in which they worked. These questions were included for two reasons. First, information obtained from these questions allowed a description of the respondents, their programs, and organizations to be developed. Second, such data allowed the exploration of important differences between ratings of the level of importance of traits and the amount of trait required by subpopulations of respondents, programs, and organizations.

In order to provide consistency, the same background information

questions were utilized in the questionnaire as were utilized in the previous two phases of the study. The questions related to the organization in which the manager worked were developed on the basis of variables identified by Smith (1988) as influencing the nature of employee assistance programs. Questions related to respondent characteristics and design characteristics of the programs were developed on the basis of the hypothesis that these criteria may influence the tasks performed by the EAP manager and the traits required.

Careful consideration was given to the construction of the questionnaire in terms of both the wording and the format. Wording was carefully chosen in attempt to avoid uncertainty or confusion. Formatting was chosen to give a clear and uncluttered appearance.

## Step 2 - The Mail Survey

### (a) The Pre-Test

Prior to conducting the mail survey, a pre-test of the questionnaire was conducted on the basis of Dillman's (1978) recommendations. The



questionnaire was subjected to the scrutiny of three types of people: 1) colleagues who understood the topic and purpose of the study; 2) educators who were potential users of the information; and 3) managers of internal, broad-brush EAPs themselves. The purpose of the pretest was to gather general impressions of the questionnaire as well as feedback on the specific wording of the questions. Modifications to the questionnaire were made on the basis of feedback obtained.

(b) The Covering Letter

The covering letter was recognized as an important factor influencing the response rate of the survey. Careful attention was given to its construction in order to motivate prospective respondents to participate in the survey and to alleviate any resistance or uncertainties they may have about participating. Particular attention was paid to constructing a letter that explained the purpose and importance of the study, the importance of the individual's response to the success of the study, assurance of anonymity and confidentiality, and the identification of the involvement of an organization important to them, that of their professional association (Rubin and Babbie, 1989). Rewards to the respondent were identified both in terms of their contribution to the

advancement of knowledge in the field and in personal terms of how the information gained through the study could be of value to them in their individual jobs. Respondents were offered a summary of findings and asked to complete an enclosed postcard if they wished to receive such a summary (Appendix 8).

Dillman (1978) emphasizes the importance of personalizing the covering letter as a means of increasing the likelihood of response. Recognizing the importance of personalization, careful attention was given to assuring the individual name of the potential respondent was included in the greeting, each letter was individually signed by the researcher, the date of the letter corresponded with the actual mailing date, and first class postage was used (Dillman, 1978).

Although every attempt was made to anticipate and address any questions or concerns respondents might have, keeping the letter to a single page in length was deemed of utmost importance. This was perceived as crucial in motivating potential respondents to read the letter and participate in the survey. Special attention was taken in choosing the wording of the letter so that jargon was avoided, information was provided in a clear and succinct

manner, and that the style of the letter was both professional and friendly.

The covering letter was scrutinized by the same three groups of people as pretested the questionnaire. Modifications were made on the basis of the feedback received.

### (c) Administration of the Survey

Careful consideration was given to the administration of the survey. Survey packages, including the covering letter, questionnaire, a self-addressed stamped envelope in which the questionnaire could be returned, and a self addressed reply card on which the respondent could request a summary of survey results were mailed to those in the sample.

Because of the sensitivity of the research topic, a decision was made not to track the individual return of questionnaires. It was believed that so doing would lessen the likelihood of individuals responding to the questionnaire. Although supplying a return postcard to be mailed separately from the questionnaire was considered, practical concerns of cost and attention to user friendliness ruled this option out.

Consideration was given to including a material incentive in attempt to further motivate potential respondents to complete and return the questionnaires. The decision not to include such incentives was made for two reasons. First, the pre-test indicated that material incentives would have a minimal motivating effect on respondents. Second, the practical concern of cost. Not only would the cost of the incentive have added to the questionnaire costs, but mailing costs would have been increased substantially.

Dillman (1978) identifies personalization of the questionnaire package as highly important to the respondent's participation. He perceives the use of address labels as an impersonal technique. Consideration was given to whether or not to use address labels or to individually type each envelope. The practicality of address labels was chosen. Dillman himself admits that the effect of the use of address labels versus individually addressed envelopes is unknown and that further research is required to determine whether response rates are affected by the substitution of address labels for individually addressed envelopes. Given this uncertainty, and the practical advantages of address labels, address labels were used.

The return of the questionnaires was requested 18 days from the mailing

date. This time frame was seen as sufficient to allow recipients to respond, yet brief enough that it might motivate them to respond prior to forgetting. Toward the end of this time, a second questionnaire package was sent to members of the sample who had not returned the reply card requesting a summary of the survey results. This package was identical to the first mailing with the exception of the covering letter (Appendix 9). The return of the questionnaires was requested 16 days from the second mailing date. This time frame was deemed sufficient to allow those who intended to respond, to do so.

#### (d) The Sample

The names of managers of internal, broad-brush EAPs were obtained from district and provincial employee assistance professional associations and councils across Canada. Participants in the first two stages of the study were included in the sample on the basis that they represented part of the general population and what was being asked for in this phase of the study was of a different order than in the earlier phases. The organizations in all provinces, except British Columbia, provided names of potential participants, 128 in all.

There appeared to be a differential awareness of who fit the criteria for the study. Lists of names provided varied from samples to full membership lists. Therefore, at the onset it was understood that the list of names may include people who did not meet the criteria of the study, and may have missed some who did meet the criteria. This, however, was believed to be the best means of securing a sample.

In attempt to gather as much data as possible, questionnaire packages were sent to all 128 managers in Canada believed to meet the criteria of the study. Responses were received from 99 (77.34%) of those sent questionnaires. Of those responding, 71 (71.72%) met the criteria of the study, while 28 (28.28%) did not. Subtracting the 28 questionnaires which did not meet the criteria of the study, which reduces the sample size to 100, the response rate becomes 71 (71%). Furthermore, extrapolating that an equal percentage of non-respondents would not have met the criteria for the study, ( $29 \times 28.28\% = 8.20$ ) the sample size rounded to the nearest whole number reduces to 92, which it can be reasonably argued, would provide a response rate of 77.17%

Of the 71 respondents meeting the criteria of the study, 61.4% were

female, while 38.6% were male. Professional backgrounds of respondents varied: 32.4% had a background in social work, 18.3% in nursing, 18.3% in psychology, 5.6% in human resources, 4.2% in business administration, 1.4% in medicine, and 19.7% in others including alcohol and drug counselling, health services, occupational health, sociology, and law enforcement. Levels of formal education included 43.3% with Master's degrees, 25.4% with a Bachelor's degree, 15.5% with the completion of a certificate program, 7.0% with a Doctoral degree, 7.0% with high school and a number of additional courses, and 2.8% with high school only. The mean number of years of EAP management experience among respondents was 5.96 years (SD 4.117) with a range from 0.25 years to 18.0 years.

Of the managers surveyed, 58% spent less than half of their work time performing EAP management functions, while 42% spent the majority of their work time carrying out such tasks. Direct accountability of the EAP management position varied. The majority of managers, 50.7%, were directly accountable to the vice president or manager of human resources, 12.7% were responsible to the chief executive officer or president of the organization, 12.7% were accountable to a joint labour/management committee, 4.2% were accountable to the manager of occupational health, and 7% were responsible

to both a joint labour/management committee and a member of the organizational structure, most often the manager of human resources. An additional 12.7% were responsible to others including safety directors, assistant executive directors or vice presidents, deputy ministers, medical or health services officers, employee services personnel, and junior executives.

The length of time the programs had been operating varied from 6 months to 25 years. The mean length of operation was 10.33 years with a standard deviation of 5.48. The majority of respondents, 52.1%, worked in programs consisting of more than 1 staff position, while 47.9% of respondents worked in programs employing only 1 staff person.

Employee involvement in the majority of programs was totally voluntary (77.5%). Of the 22.5% of programs with a non-voluntary component, the extent of this type of employee involvement was less than 50% in all cases.

The largest group of respondents, 26.8%, worked in the government sector, including municipal, provincial and federal governments. Of the remaining respondents, 14.1% worked in health care, 11.3% in utilities or communications, 9.9% in law enforcement, 7% in education, 7% in



manufacturing, 4.2% in social services, 4.2% in transportation, and 4.2% in business including retail and insurance. In addition, responses were received from managers of programs in marketing/sales (1.4%), agriculture/fishing/logging (1.4%), pulp and paper (1.4%), postal services (1.4%), financial (1.4%), and crown boards (1.4%).

The sizes of the organizations varied. Organizations employing less than 1,000 people made up 19.7% of the population, 23.9% of organizations employed between 1,001 and 2,000, 12.7% between 2,001 and 3,000, 7% between 3,001 and 4,000, 4.2% between 4,001 and 5,000, and 32.4% employed over 5,000 people. The mean female/male employee ratio was 46.66% female and 53.34% male with a standard deviation of 22.07. The mean percentage of employees belonging to labour unions was 71.2% with a standard deviation of 28.2.

### Limitations

The primary limitation of the survey was in the sampling. As a formal employee assistance professional body does not exist in one province, and no

other means of securing names of appropriate managers from that area existed, the sample does not include any respondents from that part of the country. Further, the likelihood of EAP managers meeting the criteria of the study, but having been missed in the sampling process exists. Based on these sampling concerns, the generalizability of the findings might well be limited.

### Summary

The purpose of this phase of the study was two-fold. First, it was designed to explore the level of importance and amount of each trait required to adequately perform the EAP management job. Second, it was designed to explore whether significant differences in the level of importance and amount of trait required exist between subgroups of respondents, and program and organization characteristics. Current internal, broad-brush EAP managers identified by provincial and district provincial associations, 128 in all, were surveyed using a mail out questionnaire process. A major limitation of this phase of the research was the sampling in that there was no way to determine if all potential respondents had been accessed.

## Summary Of Research Design And Methodology

The design and methodology of this study was based on job analysis techniques. It consisted of three phases of research aimed at exploring and describing the human traits important to management of internal, broad-brush employee assistance programs.

The first phase of the study was designed to facilitate the development of a comprehensive list of employee assistance management tasks. This was accomplished by carefully reviewing the relevant literature, developing a preliminary list of job tasks, conducting semi-structured individual interviews with 4 randomly selected current managers of internal, broad-brush EAPs, and compiling all the data obtained from this process into a comprehensive list of EAP management job tasks.

The second phase was designed to produce a comprehensive list of human traits required to perform the job tasks previously identified. This was accomplished with a thorough review of the relevant literature, development of a preliminary list of traits, a group focus session of a self selected sample of local managers meeting the criteria of the study aimed at generating the

knowledge, skills, abilities, and other personal characteristics important to the job of EAP management, and compiling this data into a comprehensive list of EAP management traits.

The third phase of the research was designed to gather information on EAP managers' perceptions of the level of importance of the identified traits and the amount of each trait required to adequately perform the tasks of their job. For this purpose, a questionnaire was designed and distributed to 128 internal, broad-brush EAP managers identified by their district and provincial professional associations as meeting the criteria of the study.

The primary limitation of the study lies in the generalizability of findings. Three potential sources of this limitation exist. First, the generalizability of the job tasks identified in the individual interviews. Although randomly selected, the demographics of participants in this phase were limited. The type of programs they represented excluded those in geographic locations outside of Winnipeg, programs in organizations with fewer than 4,000 employees, programs in the early stages of development, programs with only one staff position, and managers with professional backgrounds other than social work and education. The extent to which the

tasks generated represent the majority of tasks performed by the full spectrum of internal, broad-brush EAP managers is unknown. Second, the extent to which the traits identified in the group session process can be generalized is questionable. The amount of time available to generate these traits was limited given the commitments of participants. Whether additional traits would have been identified with additional time is unknown. Further, as with the previous phase, whether the limited demographics of the sample influenced the identification of the traits is unknown, but is of potential concern. Finally, the generalizability of survey findings is of question due to sampling difficulties. Although every effort was made to obtain a complete listing of names of appropriate EAP managers throughout the country, such a listing did not develop. One province was completely unrepresented, and the extent to which lists obtained from other areas of the country were complete is unknown.

## CHAPTER IV

### Findings

#### **Data Analysis**

Four types of analysis were carried out on the survey data for four distinct purposes. In all cases, analyses were carried out using the Statistical Package for the Social Sciences (SPSS).

First, descriptive statistics were used to examine the level of importance of traits and the amount of each trait required. Means, a type of average calculated by adding the numerical value of responses and dividing by the number of responses, were used to summarize responses. Mean ratings were useful in rank ordering the level of importance and the amount of traits required. Rank ordering facilitated an exploration of traits considered most important and those considered least important, as well as those considered to be required in the greatest and least amounts. Standard deviations were calculated to determine the distribution of responses around the mean. A mean of 3.00 with a standard deviation of 1 would mean that approximately 68% of

responses were between 2 and 3, indicating that there was considerable variability in responses. Although descriptive statistics yield manageable and valuable information, they merely summarize responses of a set sample and do not allow any inferences to be made beyond the sample.

Second, in order to assess whether respondents treated the two scales the same or differently, the correlation between the two scales on all 96 traits was examined using Pearson's Product-Moment Correlation. This measure of association is used with interval level data and yields information pertaining to the correlation of responses. For the purposes of this study, a correlation of .70 was used to suggest that respondents treated the two scales the same for any particular trait. If the correlation was .70 or higher for ratings of at least 75% of the traits, one could assume that although conceptually different, the two scales were treated the same by respondents. If correlations of .70 or higher existed for less than 75% of the traits one could assume that the 2 scales were treated differently by respondents.

Third, whether significant differences in ratings of traits occurred based on characteristics of respondents, the programs in which they work, and organizations in which the programs exist was explored. This was done by

creating subgroupings of data obtained from each "background information" question in the questionnaire. Using this data and the subgroupings, a series of analysis of variance (ANOVA) was carried out on both the level of importance of each trait and the amount of each trait required. Analysis of variance is a parametric test for statistical significance. It is used to examine the variance of a dependent variable using subgroupings of independent variables. ANOVA can be used to analyze any level of data and can be used when there are any number of independent variable subgroupings. Although this type of analysis provides an exploration of the differences in ratings by subpopulations, it does not generate certainties. With a probability level of .05 we would expect approximately five traits on each rating scale to appear significantly different due to chance alone. There is no way to differentiate between differences that may have occurred due to chance and those that are truly significant. Further, although one can interpret possible causes of differences, there is again no means of certainty. Keeping these limitations in mind, ANOVA is still useful in this study in providing some understanding of the factors potentially affecting both the level of importance and the amount of traits required.

Finally, the possible effects of fatigue and/or social desirability on



respondents' ratings of personal characteristics was explored. For this purpose a descriptive analysis was carried out as well as a series of t-tests. These analyses were conducted on the final category of traits relating to subjective personal characteristics, where the likelihood of fatigue and desirability were greatest. Mean ratings of the negative traits were compared to mean ratings of all other personal characteristics. Ratings of the three negative traits were grouped as follows: ratings of "none" and "minimal" were grouped together and interpreted as "low", and ratings of "moderate" and "critical/a great deal" were grouped together and interpreted as "high". T-tests were then carried out to determine if differences between low and high ratings could be interpreted as significant or if they were likely due to chance.

### **A Descriptive Analysis Of The Level Of Importance And Amount Of Traits Relevant To EAP Management**

An examination of the mean ratings of traits along with standard deviations provides an understanding of the level of importance attributed to individual traits and the amount of each trait considered necessary to adequately carry out the tasks of EAP management. For the purpose of

standardizing the description of the most and least important traits, those traits rated 3.50 or higher were described as most important to EAP management while those rated 3.00 or lower were described as least important. The same criteria were used for describing the amount of trait required. The criteria for describing traits as most and least important were based on the range of means which was between 2.44 and 3.90. Had the range been broader, different criteria would have been used, for example a mean of 2.0 or 2.5 might have been considered low. In this case, however, a mean rating of 3.0 was comparatively low. Standard deviations of .75 and greater were described as having the most, or a great deal of variability, while those of .40 and less were described as having the least, or minimal, variability.

## Knowledge

### (a) Importance

The mean level of importance of all knowledge items was 3.23 with a range of 2.69 to 3.79. Knowledge of employee assistance professional ethics and values was considered by respondents to be the most important knowledge

item (mean rating 3.79), followed by knowledge of the role of the EAP within the organization, including the underlying assumptions, beliefs, and values (mean rating 3.76). Also among the knowledge items rated most important were knowledge of the relevant resources available in the external environment (mean rating 3.69), knowledge of how to access relevant resources in the organization (mean rating 3.63), knowledge of how to promote and market the EAP within the organization (mean rating 3.63), knowledge of workplace stressors (mean rating 3.59), and knowledge of the organization's decision making process (mean rating 3.53). Knowledge of specific theories, including management theories (mean rating 2.82), adult education theory (mean rating 2.77), systems theory (mean rating 2.71), and organizational theory (mean rating 2.69), were among those knowledge items considered of least importance. Also among the knowledge items considered least important were knowledge of industrial relations (mean rating 2.71), knowledge of group dynamics (mean rating 2.89), and knowledge of where and how to recruit EAP staff (mean rating 2.94).

The standard deviations of the level of importance of knowledge items ranged from .43 to .82. Mean ratings of knowledge items with a high degree of variability, having a standard deviation of .75 or greater, were knowledge

of industrial relations (.75), and knowledge of where and how to recruit EAP staff (.82). The variability of ratings of all knowledge items was greater than could be described as minimal as all standard deviations were greater than .40.

(b) Amount

The overall mean rating of the amount of knowledge items required was 3.08 with a range of 2.54 to 3.69. Respondents believed the knowledge item EAP managers should possess to the greatest extent was knowledge of employee assistance professional ethics and values (mean rating 3.69). Among the other knowledge items considered to be required in the largest amounts were knowledge of relevant resources available in the external environment (mean rating 3.63), and knowledge of the role of the EAP within the organization (mean rating 3.62). Those knowledge items thought to be required in the least amount were knowledge of organizational theory (mean rating 2.54), knowledge of industrial relations (mean rating 2.59), knowledge of systems theory (mean rating 2.69), knowledge of adult education theory (mean rating 2.65), knowledge of management styles and theories (mean rating 2.65), knowledge of group dynamics (mean rating 2.78), knowledge of where and how to recruit EAP staff (mean rating 2.83), knowledge of the role of

work in people's lives (mean rating 2.89), knowledge of the occupational and professional groups within the organization (mean rating 2.93), knowledge of the labour unions within the organization (mean rating 2.93), and knowledge of life transitions (mean rating 2.99).

The standard deviations of ratings of the amount of knowledge items required ranged from .52 to .79. Five knowledge items had a high degree of variability in ratings of amount required: knowledge of the organization in which the EAP exists (.75), knowledge of where and how to recruit EAP staff (.77), knowledge of labour unions within the organization (.78), knowledge of occupational and professional groups in the organization (.78), and knowledge of relevant clinical modalities (.79).

Table 1 reports the mean ratings of level of importance and amount of trait required for knowledge items as well as the standard deviations. Items are ranked according to mean level of importance.

Table 1: Rank Ordering Of The Level Of Importance Of Knowledge Relevant To EAP Management

Knowledge	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
EA ethics	3.79	.48	3.69	.60	71
Role of the EAP	3.76	.43	3.62	.52	71
External resources	3.69	.58	3.63	.57	70
Internal resources	3.63	.54	3.37	.64	71
Marketing	3.63	.54	3.49	.63	71
Workplace stressors	3.59	.50	3.46	.61	71
Organization's decision making process	3.53	.56	3.30	.67	68
Organization's history, culture, etc.	3.45	.63	3.13	.75	71
Behaviour and motivation	3.39	.64	3.32	.73	71
Addictions	3.29	.59	3.20	.72	70
Workplace demographics	3.24	.57	3.00	.61	71
Crisis theory	3.23	.65	3.19	.69	69
Unions within the organization	3.23	.71	2.93	.78	69

Table 1: Rank Ordering Of The Level Of Importance Of Knowledge Relevant To EAP Management (cont.)

Knowledge	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Clinical modalities	3.19	.73	3.11	.79	70
Family dynamics	3.17	.59	3.01	.70	69
Life transitions	3.13	.61	2.99	.65	70
Occup/prof groups	3.10	.64	2.93	.78	70
Role of work in people's lives	3.08	.60	2.89	.64	71
Recruitment of EAP staff	2.94	.82	2.83	.77	69
Group dynamics	2.89	.58	2.78	.64	70
Management theories	2.82	.62	2.65	.72	71
Adult ed. theory	2.77	.66	2.65	.72	70
Systems theory	2.71	.68	2.69	.73	70
Industrial relations	2.71	.75	2.59	.69	69
Organizational theory	2.69	.58	2.54	.63	71
All knowledge items	3.23		3.080		70.16

### (c) General Analysis

Knowledge items related specifically to employee assistance, such as knowledge of employee assistance ethics and values, knowledge of the role of the EAP within the organization, knowledge of available resources within the organization and the external environment, knowledge of workplace stressors, and knowledge of how to promote and market the EAP, tended to be rated highest both in terms of their level of importance and the amount required. These knowledge items also tended to have the lowest variability in ratings indicating that the majority of respondents viewed them as highly important. Since there is relatively little variation in ratings, one would expect that the importance and amount required of these traits would not be affected by respondent, program or organization characteristics. Whether or not this is true will be explored through analysis of variance. If in fact the level of importance and amount of these knowledge items is constant and unaffected by other factors, these knowledge items should be considered highly important to EAP management and should be given adequate attention in professional training programs as well as be an area of careful scrutiny in selecting and hiring EAP managers.



Both the level of importance and the amount required of theoretical knowledge including management theories, adult education theory, systems theory, and organizational theories, were among the lowest rated knowledge items. Respondents perceived this type of knowledge to be of least importance and to be required in the least amounts. However, a relatively high variability in ratings is noted for these items. It could be that ratings were influenced by whether respondents were familiar with these theories based on their level of formal education and their professional background. One could expect managers with training in these theories, for example those with university educations in business administration, social work, or education, to perceive the value of some of these theories differently. This will be explored in the analysis of variance of ratings.

Knowledge items with the greatest variability of ratings on one or both scales included items which may be affected by characteristics of the organization and characteristics of the program. For example, in larger organizations the influence of the culture, values and goals of the organization may be strong and therefore the need for the EAP manager to be aware of these influences and possess greater knowledge of these aspects of the organization would be greater than for smaller organizations. One would

expect ratings of the knowledge of the labour unions within the organization to be affected by the whether or not the majority of employees belong to unions. One might also expect the ratings of knowledge of the occupational and professional groups within the organization to be affected by such factors as the diversity of these groups in certain types of industries. For example, organizations in government and health care employ a wide spectrum of occupational and professional groups with considerable diversity between groups. EAP managers in these settings may perceive knowledge related to these differing groups to be more important than those in industries where this type of diversity does not exist such as transportation, education, and social services. The variability of ratings for knowledge of clinical modalities and knowledge of recruitment may be due to characteristics of the EAP. Managers in programs where recruitment and clinical intervention is a part of the job would likely place greater value on traits related to these tasks than those for whom it is not a part of their job. The design of this study does not allow this supposition to be tested.

## Skills

### (a) Importance

The overall mean rating of the level of importance of skills was 3.30 with a range of 2.53 to 3.90. The highest rated skill items were interpersonal skills and skills in maintaining and utilizing confidential information, each with mean ratings of 3.90. Active listening skills (mean rating 3.76), implementation skills (mean rating 3.57), decision making skills (mean rating 3.57), information gathering skills (mean rating 3.56), referral skills (mean rating 3.56), skills in managing stress (mean rating 3.55), planning skills (mean rating 3.53), oral communication skills (mean rating 3.53), skills in setting boundaries and saying "no" (mean rating 3.52), and skills in providing constructive feedback (mean rating 3.50) were also considered highly important. Employee selection skills (mean rating 2.53), computer skills applied to the analyzing and disseminating of information (mean rating 2.65), family counselling skills (mean rating 2.72), couples counselling skills (mean rating 2.74), job analysis skills (mean rating 2.82), budgeting skills (mean rating 2.87), and supervisory skills (mean rating 2.89) were considered least important.

Standard deviations of ratings of level of importance of skills ranged from .30 to .97. Skills with ratings of high variability were supervisory skills (.77), skills in crisis counselling (.78), skills in establishing and maintaining a work climate conducive to quality work (.78), job analysis skills (.78), skills in obtaining necessary financial resources (.79), budgeting skills (.79), family counselling skills (.83), brief treatment skills (.85), skills in couples counselling (.87), and employee selection skills (.253). Those skills with minimal variability in ratings of level of importance were interpersonal skills (.30) and skill in maintaining and utilizing confidential information (.35).

(b) Amount

The mean amount of all skills required to adequately perform the tasks of EAP management was 3.21 with a range of 2.44 to 3.90. As well as being identified as the most important skills to possess, interpersonal skills and skills in maintaining and utilizing confidential information were seen as being required in the greatest amount (mean rating 3.90). In keeping with the level of importance attributed to it, active listening skills were also considered to be required in the greatest amount (mean rating 3.79). As well as being considered least important, employee selection skills (mean rating 2.44), computer skills

applied to the analyzing and disseminating of information (mean rating 2.51), family counselling skills (mean rating 2.66), couples counselling skills (mean rating 2.69), job analysis skills (mean rating 2.69), budgeting skills (mean rating 2.77), and supervisory skills (mean rating 2.79) were considered to be required to the least extent. Brief treatment skills (mean rating 2.97), teaching skills (mean rating 2.99), and skills in obtaining necessary financial resources (mean rating 2.99) were also considered to be required in the least amounts.

Standard deviations of ratings of the amount of skills required ranged from .30 to .99. Eleven skills were considered to have a high variability in ratings of amount required: assessment skills applied to individual and group needs (.76), skills in establishing and maintaining a work environment conducive to quality work (.78), skills in obtaining necessary financial resources (.79), supervisory skills (.80), budgeting skills (.80), crisis counselling skills (.81), family counselling skills (.86), job analysis skills (.86), couples counselling skills (.87), brief treatment skills (.91), and employee selection skills (.99). Two skills, interpersonal skills (.30) and skills in maintaining and utilizing confidential information (.30) had minimal variability in ratings of amount required.

Table 2 reports the mean ratings of level of importance, the amounts of traits required, and standard deviations for identified skills. Skills are rank ordered according to mean level of importance.

Table 2: Rank Ordering Of The Level Of Importance Of Skills Relevant To EAP Management

Skill	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Interpersonal	3.90	.30	3.90	.30	70
Confidentiality	3.90	.35	3.90	.30	69
Active listening	3.76	.46	3.79	.45	70
Implementation	3.57	.55	3.36	.57	70
Decision making	3.57	.58	3.47	.65	70
Info. gathering	3.56	.53	3.41	.58	70
Referral	3.56	.69	3.44	.71	70
Managing stress	3.55	.56	3.46	.56	71
Planning	3.53	.61	3.31	.65	70
Oral commun.	3.53	.58	3.49	.63	70
Setting boundaries	3.52	.61	3.38	.62	71
Providing feedback	3.50	.58	3.41	.65	70
Validating people's use of their strengths	3.43	.58	3.33	.63	70

Table 2: Rank Ordering Of The Level Of Importance Of Skills Relevant To EAP Management (cont.)

Skill	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Assessing indiv/group needs	3.41	.67	3.36	.76	70
Networking	3.41	.60	3.40	.62	70
Recognizing people's strengths	3.40	.57	3.44	.50	70
Nonverbal comm.	3.40	.58	3.34	.66	70
Public relations	3.39	.64	3.27	.68	71
Leadership	3.38	.66	3.23	.68	71
Analytical	3.36	.64	3.26	.68	70
Consultation	3.35	.63	3.30	.68	71
Assessing workplace needs	3.34	.61	3.21	.66	70
Crisis counselling	3.33	.78	3.23	.81	69
Evaluation	3.33	.68	3.24	.65	70
Time man.	3.31	.65	3.17	.65	71
Conflict man.	3.30	.54	3.20	.60	71
Written commun.	3.23	.64	3.21	.63	71
Follow up	3.21	.63	3.20	.69	70

Table 2: Rank Ordering Of The Level Of Importance Of Skills Relevant To EAP Management (cont.)

Skill	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Est/main. work climate	3.21	.78	3.09	.78	70
Obtaining financial resources	3.09	.79	2.99	.79	70
Brief treatment	3.07	.85	2.97	.91	69
Teaching	3.03	.65	2.99	.73	71
Supervisory	2.89	.77	2.79	.80	70
Budgeting	2.87	.79	2.77	.80	71
Job analysis	2.82	.78	2.69	.86	71
Couples counselling	2.74	.87	2.69	.87	68
Family counselling	2.72	.83	2.66	.86	67
Computer	2.65	.72	2.51	.67	71
Employee selection	2.53	.97	2.44	.99	70
All skills	3.299		3.213		70.10



### (c) General Analysis

The extremely high ratings of skills related to interacting with others, specifically interpersonal skills, skills in maintaining and utilizing confidential information, and active listening skills, coupled with the minimal variability of these ratings suggest that these skills are perceived as highly important to the majority of EAP managers. These high ratings suggest that special attention should be given to ensure that EAP managers have adequate training in this area. These skills were rated higher than other groups of skills such as general management skills and skills related to clinical intervention. One possible explanation for the consistently high ratings of these skills is that EAP managers typically spend a great deal of their time interacting with a variety of others including clients, other personnel within the organization, and members of the external environment and therefore highly value such skills.

Skills related to general management tasks including decision making, information gathering, planning, providing feedback, and managing stress also tended to be rated high with no great variability in ratings. As with skills related to interacting with others, these general management skills may have been rated high because of the degree to which they are used on the job.

The lowest rated skills tended to have the highest standard deviations indicating the greatest variability in ratings of these traits. As with knowledge items, this too could be due to respondents rating skills related to tasks they perform higher than managers who do not perform these tasks. Human resource tasks, supervisory tasks, counselling, budgeting, and use of a computer may not be a part of all, or even the majority of, EAP managers' jobs and therefore could account for the high variability in ratings. If this supposition is true, one would anticipate significantly different ratings of these traits based on the percentage of time managers spend performing EAP management tasks. Managers spending more than 50% of their time performing EAP management tasks might be more likely to be performing human resource tasks, supervisory tasks, budgeting, and using a computer as they would likely be working in larger programs where these tasks would more likely to be a part of their job. Also, one would expect to find a significant difference in ratings of supervisory skills between managers of programs in which there are no other staff and those in programs consisting of more than one staff position. These expectations will be explored utilizing analysis of variance.

## Abilities

### (a) Importance

The mean level of importance of the eight identified abilities was 3.60 with a range of 3.30 and 3.79. The abilities considered most important to EAP management were the ability to be sensitive to and respectful of differences in individuals and groups (mean rating 3.79), the ability to maintain a neutral and objective perspective (mean rating 3.77), the ability to conceptualize and think clearly (mean rating 3.69), the ability to learn from experience (mean rating 3.65), the ability to accept and respond to feedback (mean rating 3.62), and the ability to integrate life experience, theory, and intuition (mean rating 3.56). The abilities considered to be of least importance were the ability to predict potential outcomes of situations (mean rating 3.30) and the ability to focus on detail as well as the larger picture and to move between the two as necessary (mean rating 3.46).

Standard deviations of ratings of level of importance of abilities ranged from .41 to .64. As none of these standard deviations were less than or equal to .40 or greater than or equal to .75, the variability of ratings was neither great

nor minimal, but moderate in all cases.

(b) Amount

The mean amount of abilities required was 3.53 with a range of 3.23 to 3.70. The ability to maintain a neutral and objective perspective was considered to be required in the greatest amount with a mean rating of 3.70, followed by the ability to be sensitive to and respectful of differences in individuals and groups with a mean rating of 3.68. Also considered to be required in the greatest amounts were the ability to conceptualize and think clearly (mean rating 3.62), the ability to learn from experience (mean rating 3.55), the ability to accept and respond to feedback (mean rating 3.55), and the ability to integrate life experience, theory, and intuition (mean rating 3.51). The amount of the ability to predict potential outcomes of situations (mean rating 3.23) and the ability to focus on detail as well as to see the larger picture and to move between the two as necessary (mean rating 3.40), were in keeping with their low ratings of importance and were considered to be required in the least amount.

Standard deviations of ratings of amount of ability required ranged from

.46 to .66. The variability of ratings of all abilities was moderate.

Table 3 reports the mean ratings of level of importance, the amounts of traits required, and standard deviations for the identified abilities. Items are rank ordered according to mean level of importance.

### (c) General Analysis

It is interesting to note that the overall mean rating of the level of importance of abilities and the amount of abilities required were higher than in any other category of traits. Abilities related to one's approach to life, people, and situations tended to be rated highest and have the least variability in ratings. These include sensitivity and respect of differences in individuals and groups, a neutral and objective perspective, the ability to conceptualize and think clearly, the ability to learn from experience, the ability to accept and respond to feedback, and the ability to integrate life, theory, and intuition. The high ratings of these abilities is consistent with the high ratings of other traits related to the EAP manager's approach to a variety of people in a multitude of situations. These types of traits seem to be emerging as highly valued.

Table 3: Rank Ordering Of The Level Of Importance Of Abilities Relevant To EAP Management

Ability	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Sensitivity and respect	3.79	.41	3.68	.50	71
Neutral and objective perspective	3.77	.46	3.70	.46	69
Conceptualize and think clearly	3.69	.47	3.62	.49	71
Learn from experience	3.65	.51	3.55	.50	71
Accept and respond to feedback	3.62	.52	3.55	.56	71
Integrate life, theory, and intuition	3.56	.53	3.51	.50	71
Focus on detail and larger picture	3.46	.53	3.40	.52	70
Predict potential outcomes	3.30	.64	3.23	.66	70
All abilities	3.605		3.530		70.50

One could argue that these highly rated abilities are innate and not trainable, although admittedly potentially enhanced by training. Taking this

stand, the importance of screening for these traits both at the point of admission to professional training programs and hiring must be underscored. For those who choose to argue that these traits are trainable, the importance of appropriate attention to them in professional training and development is clear.

Cognitive abilities of focusing on detail as well as the larger picture and moving between the two as needed as well as predicting potential outcomes were considered to be of lesser value. These lower ratings are also consistent with the lower ratings of other abstract traits, such as theoretical knowledge, rather than traits that tend to be more practical and concrete.

### Other Personal Characteristics

#### (a) Importance

Ratings of the level of importance of other personal characteristics identified as important to EAP management ranged from 3.07 to 3.89 with a mean rating of 3.54. Characteristics considered most important were honesty and credibility (mean ratings 3.89). A fair and consistent approach to people

(mean rating 3.86), a willingness to adhere to a set of professional values and ethics (mean rating 3.85), a genuine interest in and commitment to the job (mean rating 3.80), self motivation and self direction (mean rating 3.66), insight into one's own values, strengths, weaknesses, and learning needs (mean rating 3.63), a professional presentation of self (mean rating 3.62), flexibility (mean rating 3.62), patience (mean rating 3.61), self confidence (mean rating 3.55), a balance between personal and professional life (mean rating 3.54), maturity (mean rating 3.52), tolerance for frustration and stress (mean rating 3.52), and a sense of humour (mean rating 3.51) were also considered among the most important personal characteristics. All identified personal characteristics were rated over 3.00 and therefore none can be described as being considered least important to EAP management.

Standard deviations of ratings of level of importance of personal characteristics ranged from .32 to .72. None of the personal characteristics could be interpreted as having high variability in ratings. Three personal characteristics, honesty (.32), credibility (.32), and a fair and consistent approach to people (.35), could be interpreted as having minimal variability in ratings.



(b) Amount

The amounts of characteristics required ranged from 2.86 to 3.86 with an overall mean rating of 3.46. Characteristics considered to be required in the greatest amounts included honesty (mean rating 3.86), a willingness to adhere to a set of professional values and ethics (mean rating 3.77), credibility (mean rating 3.75), a fair and consistent approach to people (3.73), a genuine interest in and commitment to the job (mean rating 3.70), a professional presentation of self (mean rating 3.65), self motivation and self direction (mean rating 3.58), patience (mean rating 3.52), and insight into one's own values, strengths, weaknesses, and learning needs (mean rating 3.50). The only personal characteristic with a mean rating of 3.00 or less, and therefore considered to be required in the least amount, was a willingness to take risks (mean rating 2.86).

Standard deviations of the ratings of the amount of personal characteristics required ranged from .35 to .74. None of these traits could be interpreted as having a high variability in ratings. Honesty (.35) had minimal variability in ratings.

Means and standard deviations for ratings of level of importance and amount of trait required for other personal characteristics are reported in Table

4. Characteristics are ranked according to mean level of importance.

Table 4: Rank Ordering Of The Level Of Importance Of Other Personal Characteristics Relevant To EAP Management

Personal Characteristic	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Honesty	3.89	.32	3.86	.35	71
Credibility	3.89	.32	3.75	.44	71
Fair and consistent approach to people	3.86	.35	3.73	.56	71
Willingness to adhere to prof. ethics	3.85	.44	3.77	.42	71
Interest and commitment to job	3.80	.40	3.70	.49	71
Self motivation and self direction	3.66	.51	3.58	.55	71
Personal insight	3.63	.51	3.50	.53	71
Professional presentation of self	3.62	.52	3.65	.51	71

Table 4: Rank Ordering Of The Level Of Importance Of Other Personal Characteristics Relevant To EAP Management (cont.)

Personal Characteristic	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number Of Ratings
Flexibility	3.62	.57	3.44	.58	71
Patience	3.61	.55	3.52	.58	71
Self confidence	3.55	.56	3.45	.56	71
Personal/ professional life balance	3.54	.56	3.45	.58	71
Maturity	3.52	.61	3.55	.60	71
Tolerance	3.52	.56	3.45	.60	71
Sense of humour	3.51	.61	3.41	.67	71
Assertiveness	3.46	.61	3.41	.60	71
A desire to learn	3.46	.58	3.31	.60	71
Open-minded	3.41	.60	3.27	.56	71
Perseverance	3.41	.60	3.34	.63	71
Creativity in problem solving	3.38	.59	3.28	.68	71
Stability in life	3.34	.61	3.37	.62	71
Foresight	3.23	.61	3.21	.61	71
Reliable intuition	3.14	.62	3.10	.66	71
Willingness to take risks	3.07	.72	2.86	.74	71
All personal characteristics	3.540		3.457		71

### (c) General Analysis

Three groupings of personal characteristics were considered most important to EAP management and for the most part, these characteristics were also perceived as being required in the greatest amounts. Characteristics related to professional values including honesty, credibility, a fair and consistent approach to people, a willingness to adhere to a set of professional values and ethics, an interest and commitment to the job, self-motivation and self-direction, and a professional presentation of self were among the highest rated characteristics on both scales. Characteristics related to personal values including self-confidence, maturity, and insight into one's own values, strengths, weaknesses, and learning needs were also among the highest rated. The consistently high ratings of these characteristics is not at all surprising given the critical importance of the EAP manager being perceived as both professionally and personally reputable.

A grouping of personal characteristics related to coping with stressful situations were also considered highly important and required in the greatest amounts. These characteristics included flexibility, patience, an established balance between personal and professional life, tolerance for frustration, and

a sense of humour. The job of EAP management includes a variety of potential stressors such as balancing conflicting interests of others, coping with high volumes of work, working within a context of often differing values, and professional isolation. It is therefore little wonder that characteristics related to coping with stressful situations are highly important to the job.

A willingness to take risks was the only personal characteristics to receive a rating of below 3.0 on either scale. This characteristic is of further note in that it had the highest variability in rating. One would expect that this variability might be explained by the number of years of job experience the manager had since presumably as one's level of comfort and security in the job increases, one's willingness to take risks would also increase. This expectation will be explored in the analysis of variance.

The fact that ratings of personal characteristics tended to be somewhat lower than those of abilities might indicate that social desirability had a minimal effect. On the other hand, the fact that both abilities and other personal characteristics, both more innate, were far higher than the knowledge and skills, might indicate that there was some social desirability effect in responses.

## All traits

### (a) Importance

An examination of the mean ratings of the level of importance of the identified knowledge items, skills, abilities, and other personal characteristics together provides an understanding of respondents' perceptions of the traits most important to EAP management. The overall mean rating was 3.37 with a range of 2.53 to 3.90. Eighty-five percent of all means were of moderate to critical importance. Fourteen traits (14.6%) had a mean rating of less than or equal to 3.00, 42 traits (43.8%) had a mean rating of over 3.00 but less than 3.50, and 40 traits (41.6%) had a mean rating of 3.50 and over.

Traits considered most important to EAP management were interpersonal skills (mean rating 3.90), skills in maintaining and utilizing confidential information (mean rating 3.90), honesty (mean rating 3.89), credibility (mean rating 3.89), a fair and consistent approach to people (mean rating 3.86), a willingness to adhere to professional values and ethics (mean rating 3.85), interest and commitment to the job (mean rating 3.80), the ability to be sensitive and respectful of differences in individuals and groups (mean rating

3.79), knowledge of employee assistance professional ethics and values (mean rating 3.79), the ability to maintain a neutral and objective perspective (mean rating 3.77), knowledge of the role of the EAP within the organization (mean rating 3.76), active listening skills (mean rating 3.76), the ability to conceptualize and think clearly (mean rating 3.69), knowledge of relevant resources within the external environment (mean rating 3.69), a self directed and self motivated approach to work (mean rating 3.66), the ability to learn from experience (mean rating 3.65), insight into one's own personal values, strengths, weaknesses, and learning needs (mean rating 3.63), knowledge of how to access relevant resources in the organization (mean rating 3.63), knowledge of how to promote and market the EAP within the organization (mean rating 3.63), a professional presentation of self (mean rating 3.62), the ability to accept and respond to feedback (mean rating 3.62), flexibility (mean rating 3.62), patience (mean rating 3.61), knowledge of workplace stressors (mean rating 3.59), implementation skills (mean rating 3.57), decision making skills (mean rating 3.57), the ability to integrate life experience, theory, and intuition (mean rating 3.56), information gathering skills (mean rating 3.56), referral skills (mean rating 3.56), self confidence (mean rating 3.55), skills in managing stress (mean rating 3.55), balance between personal and professional life (mean rating 3.54), knowledge of the formal decision making process of

the organization (mean rating 3.53), oral communication skills (mean rating 3.53), planning skills (mean rating 3.53), maturity (mean rating 3.52), tolerance for frustration and stress (mean rating 3.52), skills in setting boundaries and saying "no" (mean rating 3.52), a sense of humour (mean rating 3.51), and proficiency in providing constructive feedback (mean rating 3.50).

Traits considered least important to the management of internal, broad-brush EAPs were employee selection skills (mean rating 2.53), computer skills (mean rating 2.65), knowledge of organizational theory (mean rating 2.69), knowledge of industrial relations (mean rating 2.71), knowledge of systems theory (mean rating 2.71), clinical skills in family counselling (mean rating 2.72), clinical skills in couples counselling (mean rating 2.74), knowledge of adult education theory (mean rating 2.77), knowledge of theories and styles of management (mean rating 2.82), job analysis skills (mean rating 2.82), budgeting skills (mean rating 2.87), knowledge of group dynamics (mean rating 2.89), supervisory skills (mean rating 2.89), and knowledge of where and how to recruit EAP staff (mean rating 2.94).

Standard deviations of ratings of level of importance of all traits ranged from .30 to .97. Thirteen traits had high variability in ratings: supervisory



skills (.77), clinical skills in crisis counselling (.78), skills in establishing and maintaining a work climate conducive to quality work (.78), job analysis skills (.78), skills in obtaining necessary financial resources (.79), budgeting skills (.79), brief treatment skills (.85), knowledge of where and how to recruit EAP staff (.82), clinical skills in family counselling (.83), clinical skills in couples counselling (.87), and employee selection skills (.97). The level of importance of five traits had ratings with minimal variability: interpersonal skills (.30), honesty (.32), credibility (.32), skills in maintaining and utilizing confidential information (.35), and a fair and consistent approach to people (.35).

Table 5 provides a rank ordering of traits according to mean ratings of level of importance and includes standard deviations.

Table 5: Rank Order Of Traits By Level Of Importance

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Interpersonal skills	3.90	.30	70
Confidential information skills	3.90	.35	69
Honesty	3.89	.32	71
Credibility	3.89	.32	71

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Fair and consistent approach to people	3.86	.35	71
Willingness to adhere to prof. values and ethics	3.85	.44	71
Interest/commitment to the job	3.80	.40	71
Sensitivity/respect	3.79	.41	71
Knowledge of employee assistance prof. ethics and values	3.79	.48	71
Neutral and objective perspective	3.77	.46	69
Knowledge of the role of the EAP within the organization	3.76	.43	71
Active listening skills	3.76	.46	70
The ability to conceptualize and think clearly	3.69	.47	71
Knowledge of relevant resources within the external environment	3.69	.58	70

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
A self directed/motivated approach to work	3.66	.51	71
Ability to learn from experience	3.65	.51	71
Personal insight	3.63	.51	71
Knowledge of relevant resources in the organization	3.63	.54	71
Knowledge of how to promote/ market the EAP within the organization	3.63	.54	71
A professional presentation of self	3.62	.52	71
The ability to accept and respond to feedback	3.62	.52	71
Flexibility	3.62	.57	71
Patience	3.61	.55	71
Knowledge of workplace stressors	3.59	.50	71
Implementation skills	3.57	.55	70
Decision making skills	3.57	.58	70

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
The ability to integrate life experience, theory, and intuition	3.56	.53	71
Information gathering skills	3.56	.53	70
Referral skills	3.56	.69	70
Self confidence	3.55	.56	71
Skills in managing stress	3.55	.56	71
Personal/prof. life balance	3.54	.56	71
Knowledge of the decision making process of the organization	3.53	.56	68
Oral communication skills	3.53	.58	70
Planning skills	3.53	.61	70
Maturity	3.52	.61	71
Tolerance	3.52	.56	71
Skills in setting boundaries	3.52	.61	71
A sense of humour	3.51	.61	71

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Proficiency in providing feedback	3.50	.58	70
Assertiveness	3.46	.61	71
A desire to learn	3.46	.58	71
The ability to focus on detail and to see the larger picture	3.46	.53	70
Knowledge of the organization	3.45	.63	71
Skills in validating and re-enforcing people's use of their strengths	3.43	.58	70
Assessment skills applied to individual and group needs	3.41	.67	70
Networking skills	3.41	.60	70
Open-minded	3.41	.60	71
Perseverance	3.41	.60	71
Nonverbal communication skills	3.40	.62	70

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Skills in recognizing people's strengths	3.40	.57	70
Knowledge of human behaviour and motivation	3.39	.64	71
Public relations skills	3.39	.64	71
Leadership skills	3.38	.66	71
Creativity in problem solving	3.38	.59	71
Analytical skills	3.36	.64	70
Consultation skills	3.35	.63	71
Assessment skills applied to workplace needs	3.34	.61	70
Stability in life	3.34	.61	71
Crisis counselling	3.33	.78	69
Evaluation skills	3.33	.68	70
Time management skills	3.31	.65	71
The ability to predict potential outcomes of situations	3.30	.64	70
Conflict management skills	3.30	.54	71

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Knowledge of addictions	3.29	.59	70
Knowledge of workplace stressors	3.24	.57	71
Knowledge of crisis theory	3.23	.65	69
Knowledge of the labour unions within the organization	3.23	.71	69
Written communication skills	3.23	.64	70
Foresight	3.23	.61	71
Follow-up skills	3.21	.63	70
Skills in establishing and maintaining a positive work climate	3.21	.78	70
Knowledge of relevant clinical modalities	3.19	.73	70
Knowledge of family dynamics	3.17	.59	69
Intuition	3.14	.62	71
Knowledge of life transitions	3.13	.61	70

Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Knowledge of the occupational/professional groups within the organization	3.10	.64	70
Skills in obtaining financial resources	3.09	.79	70
Knowledge of the role of work in people's lives	3.08	.60	71
Brief treatment skills	3.07	.85	69
A willingness to take risks	3.07	.72	71
Teaching skills	3.03	.65	71
Knowledge of where and how to recruit EAP staff	2.94	.82	69
Supervisory skills	2.89	.77	70
Knowledge of group dynamics	2.89	.58	70
Budgeting skills	2.87	.79	71
Job analysis skills	2.82	.78	71
Knowledge of theories and styles of management	2.82	.62	71



Table 5: Rank Order Of Traits By Level Of Importance (cont.)

Trait	Mean Importance	Standard Deviation	Number Of Ratings
Knowledge of adult education theory	2.77	.66	70
Couples counselling skills	2.74	.87	68
Family counselling skills	2.72	.83	67
Knowledge of systems theory	2.71	.68	70
Knowledge of industrial relations	2.71	.75	69
Knowledge of organizational theory	2.69	.58	71
Computer skills	2.65	.72	71
Employee selection skills	2.53	.97	70
All traits	3.366		70.36

Although an examination of ratings of the level of importance of each trait separate from the ratings of the amount of each trait required provides clarity to the abundance of information stemming from this descriptive analysis, given the similarity of ratings on the two scales the merits of

interpreting these findings jointly for the sake of simplicity are apparent. Interpretations of the findings of the descriptive analysis of the level of importance of traits is found jointly with the interpretation of findings related to the amount of trait required following Table 6.

(b) Amount

The overall mean of the amount of traits considered to be required to adequately carry out the tasks of EAP management was 3.26. The range of mean ratings was between 2.44 and 3.90. Seventy-six percent of all means indicated that people needed a moderate to a great deal of the trait. This is a high percentage, however it is lower than the percent who rated the level of importance as moderate or critical. This could be due to a real difference, in that managers really need some of the trait but not a large amount, or social desirability had a greater effect on the "importance" scale than the "amount required" scale. Of the 96 traits rated, 23 (24%) had a mean rating of less than or equal to 3.00, 51 traits (53%) had a mean rating of over 3.00 and less than 3.50, 22 traits (23%) had a mean rating of 3.50 or greater.

Traits believed to be required in the greatest amount were interpersonal skills (mean rating 3.90), skills in maintaining and utilizing confidential information (mean rating 3.90), honesty (mean rating 3.86), active listening skills (mean rating 3.79), a willingness to adhere to a set of professional values and ethics (mean rating 3.77), credibility (mean rating 3.75), a fair and consistent approach to people (mean rating 3.73), an interest and commitment to the job (mean rating 3.70), the ability to maintain a neutral and objective perspective (mean rating 3.70), knowledge of employee assistance professional ethics and values (mean rating 3.69), the ability to be sensitive to and respectful of differences in individuals and groups (mean rating 3.68), a professional presentation of self (mean rating 3.65), knowledge of the relevant resources available in the external environment (mean rating 3.63), knowledge of the role of the EAP within the organization (mean rating 3.62), the ability to conceptualize and think clearly (mean rating 3.62), a self directed and self motivated approach to work (mean rating 3.58), maturity (mean rating 3.55), the ability to learn from experience (mean rating 3.55), the ability to accept and respond to positive and negative feedback (mean rating 3.55), patience (mean rating 3.52), the ability to integrate life experience, theory, and intuition (mean rating 3.51), and insight into one's own personal values, strengths, weaknesses, and learning needs (mean rating 3.50).

Traits considered to be required in the least amounts were employee selection skills (mean rating 2.44), computer skills (mean rating 2.51), knowledge of organizational theory (mean rating 2.59), knowledge of theories and styles of management (mean rating 2.65), knowledge of adult education theory (mean rating 2.65), clinical skills in family counselling (mean rating 2.66), knowledge of systems theory (mean rating 2.69), job analysis skills (mean rating 2.69), clinical skills in couples counselling (mean rating 2.69), budgeting skills (mean rating 2.77), knowledge of group dynamics (mean rating 2.78), supervisory skills (mean rating 2.79), knowledge of where and how to recruit EAP staff (mean rating 2.83), a willingness to take risks (mean rating 2.86), knowledge of the role of work in people's lives (mean rating 2.89), knowledge of the labour unions within the organization (mean rating 2.93), knowledge of the occupational and professional groups within the organization (mean rating 2.93), skills in brief treatment (mean rating 2.97), knowledge of life transitions, (mean rating 2.99), skills in obtaining necessary financial resources (mean rating 2.99), teaching skills (mean rating 2.99), and knowledge of the demographics of the workplace and the issues facing each group (mean rating 3.00).

Standard deviations of ratings of amount of trait required ranged from

.30 to .99. Fifteen traits had high variability in ratings of amount required: knowledge of the organization in which the EAP exists (.75), assessment skills applied to individual and group needs (.76), knowledge of where and how to recruit EAP staff (.77), skills in establishing and maintaining a climate conducive to quality work (.78), knowledge of labour unions within the organization (.78), knowledge of relevant clinical modalities (.79), skills in obtaining necessary financial resources (.79), supervisory skills (.80), budgeting skills (.80), clinical skills in crisis counselling (.81), job analysis skills (.86), clinical skills in family counselling (.86), clinical skills in couples counselling (.87), skills in brief treatment (.91), and employee selection skills (.99). Three traits, interpersonal skills (.30), skills in maintaining and utilizing confidential information (.30), and honesty (.35), had minimal variability in ratings of amount required.

Table 6 provides a rank ordering of traits by amount required and includes standard deviations.

Table 6: Rank Order Of Traits By Amount Required

Trait	Mean Amount	Standard Deviation	Number Of Ratings
Interpersonal skills	3.90	.30	70
Confidential information skills	3.90	.30	69
Honesty	3.86	.35	71
Active listening skills	3.79	.45	70
Willingness to adhere to prof. values and ethics	3.77	.42	71
Credibility	3.75	.44	71
Fair and consistent approach to people	3.73	.56	71
Interest/commitment to the job	3.70	.49	71
A neutral and objective perspective	3.70	.46	69
Knowledge of employee assistance prof. ethics and values	3.69	.60	71
Sensitivity/respect	3.68	.50	71
A professional presentation of self	3.65	.51	71
Knowledge of the relevant resources available in the external environment	3.63	.57	70
Knowledge of the role of the EAP within the organization	3.62	.52	71

Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
The ability to conceptualize and think clearly	3.62	.49	71
A self directed/motivated approach to work	3.58	.55	71
Maturity	3.55	.60	71
The ability to learn from experience	3.55	.50	71
The ability to accept and respond to feedback	3.55	.56	71
Patience	3.52	.58	71
The ability to integrate life experience, theory, and intuition	3.51	.50	71
Personal insight	3.50	.53	70
Knowledge of how to promote/market the EAP within the organization	3.49	.63	71
Oral communication skills	3.49	.63	70
Decision making skills	3.47	.65	70
Skills in managing stress	3.46	.56	71
Knowledge of workplace stressors	3.46	.61	70

Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
Personal/prof. life balance	3.45	.58	71
Tolerance	3.45	.60	71
Self confidence	3.45	.56	71
Skills in recognizing people's strengths	3.44	.50	70
Referral skills	3.44	.71	70
Flexibility	3.44	.58	71
Proficiency in providing feedback	3.41	.65	70
Information gathering skills	3.41	.58	70
Assertiveness	3.41	.60	71
A sense of humour	3.41	.67	71
Networking skills	3.40	.62	70
The ability to focus on detail and the larger picture, and move between the two	3.40	.52	70
Skills in setting boundaries	3.38	.62	71
Knowledge of relevant resources in the organization	3.37	.64	71
Stability in life	3.37	.62	71
Implementation skills	3.36	.57	70



Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
Assessment skills applied to individual and group needs	3.36	.76	70
Nonverbal communication skills	3.34	.66	70
Perseverance	3.34	.63	71
Skills in validating and re-enforcing people's use of their strengths	3.33	.63	70
Knowledge of human behaviour and motivation	3.32	.73	71
Planning skills	3.31	.65	70
A desire to learn	3.31	.60	71
Knowledge of the decision making process within the organization	3.30	.67	69
Consultation skills	3.30	.68	71
Creativity in problem solving	3.28	.68	71
Open-minded	3.27	.56	71
Public relations skills	3.27	.68	71
Analytical skills	3.26	.68	69
Evaluation skills	3.24	.65	70
Crisis counselling skills	3.23	.81	69

Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
The ability to predict potential outcomes of situations	3.23	.66	70
Leadership skills	3.23	.68	71
Assessment skills applied to workplace needs	3.21	.66	70
Written communication skills	3.21	.63	70
Foresight	3.21	.61	71
Knowledge of addictions	3.20	.72	69
Follow-up skills	3.20	.69	70
Conflict management skills	3.20	.60	71
Knowledge of crisis theory	3.19	.69	70
Time management skills	3.17	.65	71
Knowledge of the organization	3.13	.75	71
Knowledge of relevant clinical modalities	3.11	.79	70
A sense of intuition	3.10	.66	71
Skills in establishing and maintaining a positive work climate	3.09	.78	70

Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
Knowledge of family dynamics	3.01	.70	68
Knowledge of the demographics of the workplace	3.00	.61	71
Teaching skills	2.99	.73	71
Skills in obtaining necessary financial resources	2.99	.79	70
Knowledge of life transitions	2.99	.65	69
Brief treatment skills	2.97	.91	69
Knowledge of the occupational & professional groups within the workplace	2.93	.67	70
Knowledge of the labour unions within the organization	2.93	.78	68
Knowledge of the role of work in people's lives	2.89	.64	71
A willingness to take risks	2.86	.74	71
Knowledge of where and how to recruit EAP staff	2.83	.77	69
Supervisory skills	2.79	.80	70

Table 6: Rank Order Of Traits By Amount Required (cont.)

Trait	Mean Amount	Standard Deviation	Number Of Ratings
Knowledge of group dynamics	2.78	.64	69
Budgeting skills	2.77	.80	71
Couples counselling skills	2.69	.87	68
Job analysis skills	2.69	.86	71
Knowledge of systems theory	2.69	.73	70
Family counselling	2.66	.86	67
Knowledge of adult education theory	2.65	.72	69
Knowledge of theories and styles of management	2.65	.72	71
Knowledge of industrial relations	2.59	.69	69
Knowledge of organizational theory	2.54	.63	70
Computer skills	2.51	.67	71
Employee selection skills	2.44	.99	70
All traits	3.265		70.28

(c) General Analysis

Traits considered most important to EAP management also tended to be seen as being required in the greatest amounts. Traits related to the EAP manager's professionalism and the manner in which she/he interacts with others emerged as being of utmost importance to the job. These traits include interpersonal skills, skills in maintaining and utilizing confidential information, honesty, credibility, a fair and consistent approach to people, a willingness to adhere to professional values and ethics, the ability to be sensitive and respectful of differences in individuals and groups, knowledge of employee assistance professional ethics and values, and the ability to maintain a neutral and objective perspective. Not only did these traits receive the highest ratings, they tended to have the least variability.

Given the high ratings on both scales and the minimal variability one can conclude that these traits are seen by the majority of managers as highly valuable to EAP management, in fact more valuable than traits related to clinical intervention, general management, or theoretical perspectives.

One possible explanation for the perceived importance of these traits

lies in the sensitive nature of employee assistance and the critical importance of the manager's personal and professional reputation and positive interactions with others to the success of the program. Employees who do not have positive interactions with the program manager and do not perceive her/him as credible and trustworthy are not likely to utilize the program, and a program with a limited utilization rate is not likely to exist for long.

Another possible explanation lies in the extent to which these traits are used on the job. EAP managers spend a considerable amount of their time interacting with others, including clients, colleagues within the organization, senior management, and members of relevant external communities. It is therefore not be surprising that traits related to the most frequently performed tasks had the highest ratings.

Yet a third possible explanation could be that EAP managers tend to have backgrounds in the helping professions where these traits are generally highly valued. One could argue that if taught a particular trait is important, you will perceive it as important. If this is true, one would expect EAP managers with backgrounds in the helping professions, such as nursing, social work, and psychology, to rate these traits significantly different than those from

non-helping profession backgrounds such as business administration. This expectation will be explored through analysis of variance.

Regardless of the reason these traits are perceived as highly valued in EAP management, the implications of this finding are important. Careful consideration should be given to screening for the innate traits for admission to professional training programs and in hiring, as well as to enhancing or developing these traits through professional training and development.

Approximately half of the top rated traits could be interpreted as inherent to the individual and not learned. This would include such traits as honesty, credibility, a fair and consistent approach to people, a willingness to adhere to a professional set of values and ethics, the ability to be respectful and sensitive to differences in individuals and groups, and the ability to maintain a neutral and objective perspective to name a few. Given the subjectivity of most of these traits and the fact that they were among the traits on the questionnaire to be rated last, it is possible that social desirability and/or fatigue played a role in their ratings. These possible affects will be explored later.

Also among the traits considered most important to EAP management is a grouping of employee assistance knowledge items. These items include knowledge of the role of the EAP within the organization, knowledge of how to access relevant resources both within the organization and the external environment, knowledge of how to promote and market the EAP within the organization, and knowledge of workplace stressors. Given the high ratings of these traits and the relatively low variability, it is possible that these traits are truly important to EAP management in general and are not highly influenced by characteristics of the manager, program or organization. If this is indeed the case, one would not expect to find significant differences in ratings of these traits in examination of the analysis of variance.

Among the traits considered least important and required in the least amount were traits related to the human resource tasks (job analysis, recruitment and selection), clinical skills (couples and family counselling), supervision, and theoretical knowledge (organizational theory, systems theory, adult education theory, and management theories). Ratings of these traits tended to have the greatest variability with the exception of theoretical knowledge which seems to be consistently rated low. It could be that managers perceive more practical traits as more important.



As indicated previously, one possible explanation for the variability in ratings related to human resource, supervisory, and counselling tasks could be that characteristics of the program and organization dictate whether or not EAP managers perform these tasks and consequently whether or not they perceive them as important. The overall low ratings of these types of traits suggest that it is likely that the majority of respondents do not perform tasks related to these traits. Another possible explanation for this variability could be that one's professional background and the value attributed to these traits by differing professions influenced ratings. These possible explanations will be explored in the analysis of variance.

As is apparent, the ratings of traits on the two different scales appeared very similar. For this reason an empirical assessment of the correlation of ratings of all 96 traits on both scales was carried out.

### **Assessment Of The Correlation Of Ratings Of The Two Scales**

A visual inspection of the ratings of traits on the two scales, level of importance and amount of trait required, suggested that respondents may have

treated the scales as the same since the ratings appeared very similar. To empirically assess whether this hypothesis was accurate, the correlation of ratings of the two scales for each of the 96 traits was analyzed using Pearson's Product-Moment Correlation.

Correlations of trait ratings on the two scales ranged from .040 to .913. A correlation of .70 or greater was used to determine whether the ratings were sufficiently similar to assume that the scales had been treated as the same. The results of this analysis indicated that 43 of the 96 traits, 44.8%, were rated sufficiently similar to assume that respondents had treated them as the same. Of these 43 traits, 8 were knowledge items, 20 were skills, 1 was an ability, and 14 were other personal characteristics. Since less than 75% of the traits were rated sufficiently the same on the two scales, the premise that respondents had treated the scales as the same was rejected. One can conclude from this analysis that although similarities existed in the ratings of the traits using the two scales, respondents were able to differentiate between them.

## **An Exploration Of Significant Differences In Ratings Of Traits Based On Respondent, Program, And Organization Characteristics**

Whether significant differences in ratings of traits occurred based on characteristics of respondents, the programs in which they worked, and the organizations in which the programs existed was explored by running a series of ANOVAs (analysis of variance). This analysis provided an exploration of the differences in ratings by subpopulations. Its two primary limitations, however, are noteworthy: 1) with a probability of .05, when the results yield five or fewer significant findings there is no way of determining whether or not these are real and meaningful findings or statistical artifacts, and 2) the results do not indicate what the meaningful variations are, only that there is a significant difference between the ratings of the subpopulations. To identify where the significant differences existed among the subpopulations of each variable a series of Scheffe tests would have to be run. This, however, is beyond the scope of this study.

In order to run the ANOVAs, logical subgroupings of each background information variable were created. In the case of numerical data, special

attention was given to creating groupings of consistent intervals. In some instances, such consistent groupings created subgroups of very small sizes, for example years of EAP management experience and size of the organization. Some very small samples were obtained in categories involving non-numerical data as well, for example level of education and type of industry in which the program existed. Unfortunately, these small samples resulted in questionable findings related to these variables.

#### Analysis Of Variance According To Respondent Characteristics

The survey provided information on respondent characteristics related to: 1) level of formal education; 2) professional background; 3) years of EAP management experience; and 4) the gender of the respondent.

(a) Variance Of Ratings According To Respondents' Level Of Education

i) Importance

The greatest number of significantly different ratings of traits occurred

on the basis of the respondent's current level of formal education. An analysis of variance on this characteristic yielded 24 traits with a significantly different mean rating of level of importance. These traits included 6 knowledge items, 16 skills, and 2 other personal characteristics.

The majority of traits were rated highest by respondents with a Master's degree, while respondents with a high school education tended to rate traits lowest. Those with a Master's degree tended to rate traits related to clinical interventions, such as clinical skills in couples counselling, clinical skills in brief treatment, and clinical skills in family counselling, knowledge of life transitions, skills in recognizing people's strengths, skills in validating people's use of their strengths, and assessment skills applied to workplace needs, higher than those with other levels of formal education. Not only were ratings of level of importance of these traits rated significantly different based on level of education, the amounts required of these same traits were also rated significantly different.

Table 7 provides a comparison of the mean ratings of level of importance for these traits.

Table 7: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On The Level Of Formal Education Of Respondents

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=11)
Knowledge of relevant clinical modalities	.002	3.19 (.73)	2.71 (.49)	3.00 (.63)	2.83 (.79)	3.51 (.63)	3.60 (.55)
Knowledge of systems theory	.005	2.71 (.68)	2.29 (.49)	2.45 (.52)	2.50 (.79)	3.07 (.59)	2.60 (.55)
Knowledge of how to promote/ market the EAP within the organization	.006	3.63 (.54)	3.43 (.53)	3.91 (.30)	3.39 (.70)	3.80 (.41)	3.20 (.45)
Knowledge of life transitions	.013	3.13 (.61)	2.57 (.53)	3.00 (.63)	3.00 (.59)	3.38 (.56)	3.20 (.45)

Table 7: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=11)
Knowledge of the labour unions within the organization	.020	3.23 (.71)	2.43 (.98)	3.45 (.69)	3.18 (.73)	3.35 (.48)	3.40 (.89)
Knowledge of the role of the EAP within the organization	.025	3.76 (.43)	3.29 (.49)	3.82 (.40)	3.72 (.46)	3.87 (.35)	3.80 (.45)
Couples counselling skills	.000	2.74 (.87)	2.14 (.90)	2.40 (.52)	2.35 (.86)	3.28 (.70)	2.40 (.89)
Decision making skills	.001	3.57 (.58)	3.14 (.69)	3.82 (.40)	3.39 (.50)	3.79 (.41)	3.00 (1.00)

Table 7: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=11)
Information gathering skills	.001	3.56 (.53)	3.29 (.49)	3.82 (.40)	3.33 (.49)	3.76 (.44)	3.00 (.71)
Skills in managing stress	.001	3.55 (.56)	3.43 (.53)	3.45 (.69)	3.17 (.51)	3.83 (.38)	3.60 (.55)
Oral communication skills	.002	3.53 (.58)	3.00 (.58)	3.82 (.40)	3.33 (.59)	3.72 (.45)	3.20 (.84)
Skills in validating people's use of their strengths	.002	3.43 (.58)	3.00 (.00)	3.36 (.50)	3.28 (.57)	3.72 (.45)	3.00 (1.00)
Brief treatment skills	.004	3.07 (.85)	2.57 (.98)	2.91 (.70)	2.62 (.93)	3.48 (.69)	3.20 (.45)



Table 7: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On The Level Of Formal Education Of Respondents (cont.)

Trait	Significance of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=11)
Family counselling skills	.004	2.72 (.83)	2.14 (.90)	2.50 (.71)	2.47 (.87)	3.14 (.64)	2.25 (.96)
Consultation skills	.008	3.35 (.64)	2.86 (.38)	2.91 (.54)	3.50 (.62)	3.53 (.57)	3.40 (.89)
Analytical skills	.009	3.36 (.64)	3.00 (.00)	3.36 (.50)	3.11 (.76)	3.66 (.48)	3.00 (1.00)
Planning skills	.009	3.53 (.61)	3.14 (.69)	3.82 (.40)	3.28 (.67)	3.72 (.45)	3.20 (.84)
Proficiency in providing feedback	.013	3.50 (.58)	3.00 (.58)	3.45 (.52)	3.56 (.51)	3.69 (.47)	3.00 (1.00)
Implementation skills	.017	3.57 (.55)	3.29 (.49)	3.91 (.30)	3.39 (.61)	3.69 (.47)	3.20 (.84)

Table 7: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On The Level Of Formal Education Of Respondents (cont.)

Trait	Significance of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=11)
Teaching skills	.027	3.03 (.65)	2.57 (.53)	2.82 (.60)	2.89 (.58)	3.30 (.60)	3.00 (1.00)
Skills in recognizing people's strengths	.036	3.40 (.57)	3.14 (.38)	3.27 (.47)	3.22 (.55)	3.66 (.48)	3.20 (1.10)
Assessment skills applied to workplace needs	.048	3.34 (.61)	2.71 (.49)	3.36 (.50)	3.39 (.70)	3.48 (.51)	3.20 (.84)
Credibility	.007	3.89 (.32)	4.00 (.00)	3.91 (.30)	3.89 (.32)	3.93 (.25)	3.40 (.55)
Flexibility	.016	3.62 (.57)	3.29 (.49)	3.55 (.52)	3.83 (.38)	3.70 (.54)	3.00 (1.00)

( ) Standard Deviation

ii) Amount

Mean ratings of the amount of trait required for 24 of the 96 traits were significantly different based on the level of formal education of the respondent. These traits included 6 knowledge items, 15 skills, and 3 other personal characteristics. Respondents with Master's degrees tended to rate the amount of traits required highest while those with high school educations tended to provide the lowest ratings. A comparison of the mean ratings of these traits is provided in Table 8.

iii) General Analysis

The vast majority of traits affected by the level of education of respondents were knowledge items and skills. For the most part these traits related to clinical intervention tasks. Approximately half of the traits rated significantly different according to level of education appeared on both scales.

Table 8: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Level Of Formal Education Of Respondents

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=5)
Knowledge of life transitions	.003	2.99 (.65)	2.43 (.53)	2.70 (.48)	2.89 (.47)	3.31 (.71)	2.80 (.45)
Knowledge of relevant clinical modalities	.005	3.11 (.79)	2.71 (.49)	2.73 (.65)	2.83 (.79)	3.45 (.74)	3.60 (.89)
Knowledge of systems theory	.010	2.69 (.73)	2.43 (.53)	2.36 (.50)	2.39 (.78)	3.03 (.73)	2.80 (.45)
Knowledge of workplace stressors	.012	3.46 (.61)	3.00 (.58)	3.18 (.60)	3.39 (.70)	3.63 (.49)	4.00 (.00)
Knowledge of group dynamics	.019	2.78 (.64)	2.14 (.38)	2.80 (.42)	2.83 (.51)	2.97 (.68)	2.40 (.89)

Table 8: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=5)
Knowledge of crisis theory	.033	3.19 (.69)	2.86 (.69)	2.82 (.60)	3.06 (.64)	3.45 (.69)	3.40 (.55)
Couples counselling skills	.000	2.69 (.87)	2.00 (.82)	2.40 (.52)	2.35 (.86)	3.21 (.67)	2.40 (1.14)
Family counselling skills	.000	2.66 (.86)	2.00 (.82)	2.40 (.52)	2.35 (.86)	3.17 (.71)	2.00 (.82)
Consultation skills	.001	3.30 (.68)	2.86 (.38)	2.64 (.81)	3.44 (.70)	3.47 (.51)	3.80 (.45)
Brief treatment skills	.001	2.97 (.91)	2.29 (1.11)	2.73 (.79)	2.53 (.87)	3.49 (.69)	3.00 (.71)
Written communication skills	.001	3.21 (.63)	3.00 (.58)	2.73 (.47)	3.06 (.73)	3.55 (.51)	3.20 (.45)

Table 8: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=5)
Planning skills	.011	3.31 (.65)	2.57 (.53)	3.45 (.52)	3.39 (.61)	3.45 (.57)	3.00 (1.00)
Skills in validating/re-enforcing people's use of their strengths	.011	3.33 (.63)	2.71 (.49)	3.18 (.75)	3.28 (.67)	3.59 (.50)	3.20 (.45)
Oral communication skills	.014	3.49 (.63)	3.00 (.58)	3.64 (.50)	3.28 (.75)	3.72 (.45)	3.20 (.84)
Crisis counselling skills	.018	3.23 (.81)	2.43 (.98)	3.27 (.79)	3.12 (.86)	3.52 (.63)	3.00 (.71)
Assessment skills applied to workplace needs	.019	3.21 (.66)	2.57 (.53)	3.100 (.30)	3.22 (.73)	3.45 (.63)	3.00 (.71)

Table 8: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=5)
Teaching skills	.020	2.99 (.73)	2.43 (.79)	2.64 (.67)	2.94 (.64)	3.27 (.64)	3.00 (1.00)
Time management skills	.033	3.17 (.65)	2.43 (.53)	3.18 (.40)	3.28 (.67)	3.27 (.64)	3.20 (.84)
Decision making skills	.037	3.47 (.65)	3.00 (.82)	3.55 (.52)	3.39 (.70)	3.69 (.47)	3.00 (1.00)
Implementation skills	.038	3.36 (.57)	2.86 (.38)	3.55 (.52)	3.50 (.51)	3.38 (.56)	3.00 (.71)
Follow-up skills	.043	3.20 (.69)	3.14 (.69)	3.55 (.52)	3.17 (.71)	3.24 (.69)	2.40 (.55)
A self directed/self motivated approach to work	.024	3.58 (.55)	3.14 (.38)	3.55 (.52)	3.39 (.61)	3.77 (.50)	3.80 (.45)

Table 8: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Level Of Formal Education Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	High School (N=7)	Certificate Course (N=11)	Bachelor's Degree (N=18)	Master's Degree (N=30)	PhD (N=5)
Stability in life	.033	3.37 (.61)	3.14 (.38)	3.27 (.65)	3.28 (.46)	3.60 (.62)	2.80 (.84)
Tolerance for frustration and stress	.035	3.45 (.60)	3.00 (.58)	3.36 (.50)	3.28 (.57)	3.63 (.61)	3.80 (.45)

( ) Standard Deviation



Both the ratings of the level of importance and the amount required of knowledge of systems theory were affected by level of education. Ratings of the amount of crisis theory needed were also affected by respondents' level of education. A previous supposition was that the level of formal education of respondents may significantly affect ratings of theories, which are generally taught at the university level, and more specifically at the Master's level. These findings, coupled with the fact that they were rated highest by those with a Master's degree, provide some support to this. However, it is somewhat surprising that more theoretical knowledge items were not found to be rated significantly different based on level of education.

One possible explanation for these findings is the possibility that these significant differences may be caused by the fact that managers with different levels of education tend to be hired into different kinds of jobs with different kinds of tasks, therefore requiring different kinds of knowledge and skills to perform these tasks.

Some degree of caution should be used in interpreting these findings as the size of one group of respondents is quite small ( $N=7$ ). A sample size of less than 10 makes the findings questionable.

(b) Variance Of Ratings According To The Professional Background Of Respondents

i) Importance

Among respondent characteristics, an analysis of variance based on the professional background of respondents yielded the second most notable findings. Mean ratings of the level of importance of 14 traits were found to be significantly different according to the professional background of the EAP managers. These traits included 3 knowledge items, 8 skills, and 3 other personal characteristics. Respondents with nursing and psychology backgrounds tended to rate the level of importance of traits higher than the other professional groups, while those with business administration backgrounds tended to provide the lowest ratings. A comparison of means is provided in Table 9.

ii) Amount

The mean ratings of the amount of trait required were significantly different for 7 traits when analyzed for variance according to professional background of respondents. Among these traits were 4 knowledge items and 3 other personal characteristics. Respondents with professional backgrounds in social work, psychology, and nursing tended to rate the amount of these traits higher than the other groups, while respondents with business administration and other professional backgrounds tended to provide the lowest ratings. Table 10 provides a comparison of the mean ratings of these traits.

Table 9: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Professional Background Of Respondents

Trait	Sig. of F Value	Total Group (N=71)	Social Work (N=23)	Business Admin. (N=7)	Nursing (N=13)	Psychology (N=13)	Other (N=15)
Knowledge of crisis theory	.015	3.23 (.64)	3.35 (.57)	2.71 (.49)	3.64 (.50)	3.38 (.65)	2.87 (.64)
Knowledge of adult education theory	.027	2.77 (.66)	2.74 (.62)	2.57 (.53)	3.17 (.39)	3.15 (.55)	2.27 (.70)
Knowledge of systems theory	.048	2.71 (.68)	3.09 (.67)	2.57 (.53)	2.62 (.51)	2.92 (.29)	2.13 (.74)
Crisis counselling skills	.001	3.33 (.78)	3.50 (.60)	2.43 (.79)	3.67 (.49)	3.54 (.66)	3.07 (.96)
Leadership skills	.007	3.38 (.66)	3.35 (.57)	2.71 (.76)	3.77 (.44)	3.46 (.78)	3.33 (.62)
Assessment skills applied to workplace needs	.010	3.34 (.61)	3.52 (.51)	2.71 (.49)	3.50 (.52)	3.38 (.65)	3.20 (.68)

Table 9: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Professional Background Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	Social Work (N=23)	Business Admin. (N=7)	Nursing (N=13)	Psychology (N=13)	Other (N=15)
Couples counselling skills	.022	2.74 (.87)	3.14 (.77)	2.29 (.76)	2.55 (.82)	3.15 (.69)	3.20 (.56)
Computer skills	.022	2.65 (.72)	2.70 (.63)	2.14 (.38)	2.77 (.83)	3.15 (.69)	2.27 (.59)
Brief treatment skills	.025	3.07 (.85)	3.36 (.79)	2.43 (.79)	3.00 (.85)	3.46 (.66)	2.67 (.82)
Skills in validating and re-enforcing people's use of their strengths	.028	3.43 (.58)	3.61 (.50)	3.43 (.53)	3.17 (.39)	3.77 (.60)	3.07 (.59)
Time management skills	.033	3.31 (.65)	3.35 (.57)	2.86 (.69)	3.54 (.52)	3.62 (.51)	3.00 (.76)
A willingness to take risks	.033	3.07 (.72)	3.43 (.59)	3.00 (.58)	2.77 (.72)	3.31 (.75)	2.60 (.63)

Table 9: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Professional Background Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	Social Work (N=23)	Business Admin. (N=7)	Nursing (N=13)	Psychology (N=13)	Other (N=15)
A desire to learn	.040	3.46 (.58)	3.57 (.51)	3.00 (.58)	3.46 (.52)	3.69 (.48)	3.33 (.72)
Sense of humour	.049	3.51 (.61)	3.48 (.59)	3.14 (.69)	3.85 (.38)	3.62 (.51)	3.33 (.72)

( ) Standard Deviation

Table 10: Comparison Of Mean Amounts Of Traits Required For Traits Rated Significantly Different According To Professional Background Of Respondents

Trait	Sig. of F Value	Total Group (N=71)	Social Work (N=23)	Business Admin. (N=7)	Nursing (N=13)	Psychology (N=13)	Other (N=15)
Knowledge of systems theory	.011	2.69 (.73)	3.13 (.76)	2.43 (.53)	2.54 (.52)	2.58 (.51)	2.33 (.82)
Knowledge of crisis theory	.012	3.19 (.69)	3.35 (.78)	2.43 (.53)	3.17 (.39)	3.38 (.65)	3.13 (.64)
Knowledge of relevant clinical modalities	.031	3.11 (.79)	3.22 (.85)	2.57 (.53)	3.00 (.58)	3.58 (.67)	2.93 (.88)
Knowledge of industrial relations	.044	2.59 (.69)	2.78 (.74)	2.43 (.53)	2.83 (.39)	2.25 (.45)	2.47 (.92)
Tolerance for frustration and stress	.006	3.45 (.60)	3.65 (.49)	3.14 (.38)	3.31 (.63)	3.85 (.38)	3.07 (.70)

Table 10: Comparison Of Mean Amounts Of Traits Required For Traits Rated Significantly Different According To Professional Background Of Respondents (cont.)

Trait	Sig. of F Value	Total Group (N=71)	Social Work (N=23)	Business Admin. (N=7)	Nursing (N=13)	Psychology (N=13)	Other (N=15)
A professional presentation of self	.018	3.65 (.51)	3.74 (.45)	3.14 (.38)	3.77 (.44)	3.69 (.48)	3.60 (.63)
Persever-ance	.021	3.34 (.63)	3.39 (.58)	2.71 (.76)	3.61 (.51)	3.46 (.66)	3.20 (.56)

( ) Standard Deviation



### iii) General Analysis

In examining the results of the analysis of variance on both scales it is apparent that respondents with a professional background in business administration tended to rate the significantly different traits lower than those of other professional backgrounds, and that those with backgrounds in the typical helping professions of nursing, social work, and psychology tended to rate traits similarly. A possible explanation for the higher ratings by those with backgrounds in nursing, social work, and psychology is that they may have received professional training in these kinds of traits, including assessment skills (granted applied to varying contexts), clinical skills in crisis counselling, and knowledge of crisis theory, and therefore perceive them as more valuable.

One would expect respondents to rate traits typically associated with their professional background higher than those with different backgrounds. The fact that traits not typically related to business administration were rated lower by those with business administration backgrounds could have been predicted, however, this does not explain the low ratings given to leadership and time management skills. A possible explanation for this finding could be that those with business administration backgrounds used the lower end of the

rating scales in most cases. One could argue that those with a business administration background might have rated all traits related to EAP management low as this type of management could be interpreted as being outside of the mainstream, and therefore valued less by them. In a less valued job, one would expect related traits to also be valued less. It is impossible to tell with this level of analysis whether the traits rated significantly different according to professional background appear strictly because of the low ratings provided by those with business administration backgrounds.

Another possible explanation for the differences in ratings of these traits could be that managers with different professional backgrounds are hired into different kinds of jobs requiring different kinds of traits or utilizing traits to differing degrees.

As previously identified, the design of the questions relating to professional background and level of education did not facilitate the kind of differentiation expected. Characteristics of respondents were such that the majority of respondents with completion of a certificate course were nurses, those with Master's degrees tended to have backgrounds in social work, and the majority with PhDs tended to have psychology backgrounds. Conclusions

about the affects of professional background and level of education are therefore limited.

It was thought that those with backgrounds in the helping professions, namely nursing, social work, and psychology, might more highly value traits related to the manager's personal and professional reputation and the manner in which she/he interacts with others, and therefore rate them higher. This analysis does not support this expectation as none of the traits associated with personal and professional values or interactions with others were among the significantly different rated traits.

(c) Variance Of Ratings According To The Respondent's Years Of EAP  
Management Experience

i) Importance

The mean level of importance of 11 traits were significantly different based on the years of EAP management experience of respondents. These traits included 5 knowledge items, 2 skills, and 4 other personal characteristics.

The mean ratings by managers with over 10 years of EAP management experience was highest in all cases. Eight of the traits had a linear progression in that as the number of years of EAP management experience increased, so did the ratings of the level of importance of traits. These progressions tended to be related to personal characteristics. Also ratings of knowledge of addictions and crisis theory had linear progressions. This later finding could be attributed to the primary focus of programs over 10 years ago.

A comparison of the mean ratings of the level of importance of these traits is provided in Table 11.

Table 11: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Respondents' Years Of EAP Management Experience

Trait	Sig. of F Value	Total Group (N=70)	5 Yrs And Under (N=38)	Over 5 Yrs Thru 10 Yrs (N=23)	Over 10 Yrs (N=9)
Knowledge of group dynamics	.005	2.88 (.58)	2.82 (.56)	2.78 (.52)	3.50 (.53)
Knowledge of the decision making process of the organization	.011	3.54 (.56)	3.36 (.59)	3.68 (.48)	3.89 (.33)

Table 11: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Respondents' Years Of EAP Management Experience

Trait	Sig. of F Value	Total Group (N=70)	5 Yrs And Under (N=38)	Over 5 Yrs Thru 10 Yrs (N=23)	Over 10 Yrs (N=9)
Knowledge of the labour unions within the organization	.035	3.22 (.71)	3.16 (.55)	3.09 (.92)	3.78 (.44)
Knowledge of addictions	.048	3.29 (.60)	3.18 (.51)	3.30 (.70)	3.75 (.46)
Knowledge of crisis theory	.049	3.24 (.65)	3.14 (.59)	3.22 (.74)	3.75 (.46)
Computer skills	.007	2.64 (.72)	2.55 (.69)	2.52 (.67)	3.33 (.71)
Time management skills	.043	3.30 (.65)	3.18 (.65)	3.30 (.63)	3.78 (.44)
Stability in life	.009	3.33 (.61)	3.13 (.62)	3.52 (.51)	3.67 (.50)
A developed/ reliable sense of Intuition	.011	3.13 (.61)	3.00 (.62)	3.13 (.55)	3.67 (.50)
A willingness to take risks	.033	3.07 (.73)	2.89 (.76)	3.17 (.65)	3.56 (.53)
Foresight	.044	3.21 (.61)	3.11 (.65)	3.22 (.52)	3.67 (.50)

( ) Standard Deviation

ii) Amount

An analysis of variance of the amount of traits required according to respondents' years of EAP management experience yielded 12 traits rated significantly different. These traits included 6 knowledge items, 1 ability, and 5 other personal characteristics. The mean ratings of managers with over 10 years of EAP management experience was higher in all cases as it was for ratings of level of importance. A linear progression exists for the majority of traits.

One possible explanation is that as the manager's mastery of the job increases with years of experience, she/he becomes more aware of the importance of these particular traits to the job. Many of the knowledge items rated significantly different were related to understanding and working within the organizational environment as well as interacting with the multitude of people interfacing with the EAP. These include knowledge of the occupational and professional groups within the organization, knowledge of the formal decision making process of the organization, knowledge of group dynamics, and knowledge of human behaviour and motivation. The value of such traits as the ability to learn from experience, stability in life, a developed and reliable

sense of intuition, a desire to learn, patience, and foresight could also have been learned through years of experience.

Of particular interest is the rating of the required amount of ability to learn from experience. Those with the most experience perceived this trait to be required in the greatest amount. In fact, there was no variability of ratings. All managers with over 10 years EAP management experience gave it the highest rating possible.

Table 12 provides a comparison of mean ratings of amount of trait required for these significantly different rated traits.

Table 12: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Respondents' Years Of EAP Management Experience.

Trait	Sig. of F Value	Total Group (N=70)	5 Yrs And Under (N=38)	Over 5 Yrs Thru 10 Yrs (N=22)	Over 10 Yrs (N=9)
Knowledge of the occupational professional groups within the organization	.001	2.93 (.67)	2.81 (.70)	2.83 (.49)	3.67 (.50)
Knowledge of the decision making process of the organization	.005	3.31 (.67)	3.11 (.62)	3.39 (.72)	3.89 (.33)
Knowledge of group dynamics	.018	2.78 (.64)	2.71 (.65)	2.68 (.57)	3.37 (.52)
Knowledge of crisis theory	.031	3.19 (.69)	3.05 (.70)	3.22 (.67)	3.75 (.46)
Knowledge of human behaviour and motivation	.033	3.33 (.74)	3.18 (.80)	3.35 (.65)	3.89 (.33)
Knowledge of adult education theory	.044	2.661 (.72)	2.55 (.72)	2.64 (.66)	3.25 (.71)
The ability to learn from experience	.007	3.56 (.50)	3.55 (.50)	3.39 (.50)	4.00 (.00)
Stability in life	.000	3.36 (.61)	3.11 (.61)	3.61 (.50)	3.78 (.44)



Table 12: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Respondents' Years Of EAP Management Experience. (cont)

Trait	Sig. of F Value	Total Group (N=70)	5 Yrs And Under (N=38)	Over 5 Yrs Thru 10 Yrs (N=22)	Over 10 Yrs (N=9)
A developed and reliable sense of intuition	.003	3.09 (.65)	2.89 (.65)	3.17 (.58)	3.67 (.50)
A desire to learn	.007	3.31 (.60)	3.24 (.68)	3.22 (.42)	3.89 (.33)
Patience	.014	3.51 (.58)	3.34 (.63)	3.65 (.49)	3.89 (.33)
Foresight	.029	3.20 (.60)	3.08 (.59)	3.22 (.60)	3.67 (.50)

( ) Standard Deviation

(d) Variance Of Ratings According To The Gender Of The Respondent

i) Importance

The mean ratings of two traits were significantly different according to the gender of the respondent. These two traits were both personal characteristics: flexibility and stability in life. Flexibility was rated higher by

female respondents while stability in life was rated higher by male respondents.

A comparison of the mean ratings of these traits is provided in Table 13.

Table 13: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To The Gender Of The Respondent

Trait	Sig. of F Value	Total Group (N=70)	Female Respondents (N=43)	Male Respondents (N=27)
Flexibility	.009	3.63 (.60)	3.77 (.48)	3.41 (.64)
Stability in life	.037	3.33 (.61)	3.21 (.60)	3.52 (.58)

( ) Standard Deviation

One possible explanation is that these traits are reflective of the fact that women tend to experience more change in their lives, therefore valuing the ability to be flexible in the face of this change higher than men. Stability in life, something women often experience less of, is valued less. However, although the significance of the F value was very low in both cases, the fact that only two traits appear suggests these findings may well be due to chance. Out of 96 traits, with a probability of .05, one would expect approximately 5 traits to appear significant due to chance alone. With only two traits resulting from this analysis, they could be statistical artifacts.

ii) Amount

The mean ratings of the amount of trait required for five traits were significantly different on the basis of gender of respondent. These traits included 2 knowledge items, 2 skills, and 1 other personal characteristic. The ratings of male respondents for the amount of these traits required were greater in all five cases. The type of traits with significantly different ratings according to gender tended to be practical knowledge and skills such as knowledge of how to promote and market the EAP within the organization, employee selection skills, and analytical skills. Findings of the analysis of variance of amount of trait required according to gender are reported in Table 14.

iii) General Analysis

It is possible that these findings are due to chance as one would expect approximately five traits to appear significant due to chance alone. However, the fact that stability in life also appears in the analysis of variance of ratings of the level of importance suggests that there may be meaningful differences

Table 14: Comparison Of Mean Amounts Of Traits Required For Traits Rated Significantly Different Based On The Gender Of The Respondent

Trait	Sig. of F Value	Total Group (N=70)	Female Respondents (N=43)	Male Respondents (N=27)
Knowledge of crisis theory	.004	3.19 (.69)	3.00 (.70)	3.48 (.58)
Knowledge of how to promote and market EAP	.021	3.49 (.63)	3.35 (.69)	3.70 (.47)
Employee selection skills	.022	2.46 (.98)	2.26 (.93)	2.81 (.98)
Analytical skills	.041	3.28 (.67)	3.15 (.65)	3.48 (.64)
Stability in life	.031	3.36 (.61)	3.23 (.57)	3.56 (.64)

( ) Standard Deviation

in ratings of this trait based on gender. It is also possible that because males tend to be hired into different kinds of jobs than women they may more highly value the traits associated with the tasks they perform. Since men tend to be hired into larger EAPs where tasks of marketing and employee selection would likely be components of the job, it is not surprising that traits related to these tasks are rated significantly different. Further, it is possible that because women tend to have different kinds of professional backgrounds, for example

social work and nursing, and tend to have different levels of education, in this case certificates and masters' degrees, these findings could be influenced by other characteristics. However, a re-examination of ratings of these traits on the basis of level of education and professional background indicates that although ratings of these traits tended to be influenced by these respondent characteristics, the highest ratings were typically provided by levels of education and professional backgrounds dominated by women. This latter theory can therefore be dismissed.

#### (e) Overall Variance Of Traits According To Respondent Characteristics

##### i) Importance

The mean levels of importance of a total of 38 of the 96 traits were significantly affected by respondent characteristics. The majority of these were affected by respondents' level of education and professional background. Of these 38 traits, 11 were knowledge items, 20 were skills, and 7 were other personal characteristics.

The mean levels of importance of three knowledge items, knowledge of the labour unions within the organization, knowledge of systems theory, and knowledge of crisis theory were significantly affected by more than one respondent characteristic. Knowledge of the labour unions existing within the organization was rated significantly different according to both level of education and years of EAP management experience. Those with certificates rated this knowledge item highest as did those with over 10 years EAP management experience. Knowledge of crisis theory was rated significantly different according to professional background and years of EAP experience. As previously indicated, differentiation of the influence of professional background and level of education are not clear. If in fact there is no difference, these two traits could be interpreted as being affected by the same respondent characteristics.

The mean levels of importance of seven skills were significantly affected by more than one respondent characteristic. These skills include skills in validating and re-enforcing people's use of their strengths, assessment skills applied to workplace needs, clinical skills in brief treatment, clinical skills in couples counselling, time management skills, and computer skills. Ratings of the intervention related skills were significantly affected by level of education

and professional background in all cases, adding support to the feeling that these are one in the same. Ratings of the two traits related to administrative tasks were affected by professional background and years of EAP management experience. In both cases these traits were rated higher by respondents with psychology backgrounds and over 10 years EAP management experience. Given that those with psychology backgrounds tend to have PhDs this finding is not surprising. Respondents having completed a PhD would likely value time management skills and computer skills more than those with other levels of education. It is also not surprising that the importance of these skills is rated highest by those with over 10 years EAP management experience as their value may have been demonstrated over time.

The mean level of importance of abilities was not significantly affected by respondent characteristics in any case.

Mean levels of importance of three personal characteristics were significantly affected by more than one respondent characteristic. These characteristics were a willingness to adhere to a set of professional values and ethics (affected by professional background and years of EAP management experience), flexibility (affected by level of education and gender of

respondent), and stability in life (affected by years of EAP management experience and gender of respondent). The fact that the two characteristics affected by the gender of the respondent were also affected by another characteristic of respondents add support to the belief that these gender related findings are not due to chance alone.

ii) Amount

The amount required of 39 traits were significantly affected by respondent characteristics. Twelve of these traits were knowledge items, 17 were skills, 1 was an ability, and 9 were other personal characteristics. The means of three knowledge items were significantly affected by two respondent characteristics. These are knowledge of systems theory, knowledge of relevant clinical modalities, and knowledge of group dynamics. Knowledge of systems theory was affected on this scale by the same characteristics as the level of importance, namely professional background and level of education. This finding adds further support to the supposition that traits typically related to one's training are perceived as most valuable. Significant differences in ratings of amount of knowledge of relevant clinical modalities required, also affected by both level of education and professional background, adds additional



support of this theory and further reflects the lack of differentiation between level of education and professional background. Ratings of the amount of knowledge of group dynamics required were affected by the level of education of respondents and their years of EAP management experience.

The amount of knowledge of crisis theory believed to be required was affected by all four respondent characteristics indicating that it is particularly susceptible to these influences and that it is viewed as very different by numerous groupings of managers.

None of the mean amounts of skills or abilities were affected by more than one respondent characteristic.

The personal characteristic tolerance for frustration and stress was affected by level of education and professional background, further reflecting the lack of differentiation between these characteristics. Stability in life was affected by 3 of the 4 respondent characteristics: level of education, years of EAP management experience, and gender of respondent. This finding again adds support to the supposition that the variance of ratings of this trait are true and not due to chance.

## Analysis Of Variance According To Program Characteristics

Survey information related to characteristics of the EAPs in which respondents worked allowed analysis of variance to be carried out according to five program characteristics: 1) number of years of program operation; 2) whether the program had one, or more than one, staff position; 3) whether the program had a non-voluntary component; 4) whether the manager spent over or under 50% of her/his time performing EAP management tasks; 5) the EAP's point of accountability within the organization. The highest number of differences based on program characteristics were found to be according to years of program operation.

### (a) Variance Of Ratings According To Years Of Program Operation

#### i) Importance

An analysis of variance of the level of importance of traits according to years of program operation resulted in the identification of 14 traits that were rated significantly different. These traits included 3 knowledge items, 4 skills, 1 ability, and 6 other personal characteristics. Managers of programs

operating over 10 years provided the highest mean ratings in all cases. A linear progression existed for all six personal characteristics. Knowledge and skill items tended to be related to general management tasks such as analytical skills, decision making skills, supervisory skills, written communication skills, and knowledge of theories and styles of management. A comparison of means is provided in Table 15.

Table 15: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On Years Of Program Operation

Trait	Sig. of F Value	Total Group (N=67)	Programs Operating 5 Yrs And Under (N=14)	Programs Operating Over 5 Yrs Thru To 10 Yrs (N=26)	Programs Operating Over 10 Yrs (N=27)
Knowledge of relevant clinical modalities	.005	3.18 (.74)	3.07 (.62)	2.88 (.77)	3.52 (.64)
Knowledge of the labour unions within the organization	.030	3.21 (.71)	3.43 (.85)	2.92 (.64)	3.37 (.63)
Knowledge of theories and styles of management	.036	2.81 (.61)	2.86 (.36)	3.00 (.62)	2.58 (.64)
Analytical skills	.019	3.35 (.64)	3.50 (.65)	3.08 (.69)	3.54 (.51)
Decision making skills	.019	3.56 (.59)	3.43 (.65)	3.39 (.64)	3.81 (.40)

Table 15: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different Based On Years Of Program Operation (cont.)

Trait	Sig. of F Value	Total Group (N=67)	Programs Operating 5 Yrs And Under (N=14)	Programs Operating Over 5 Yrs Thru To 10 Yrs (N=26)	Programs Operating Over 10 Yrs (N=27)
Supervisory skills	.027	2.89 (.75)	2.93 (.62)	2.60 (.77)	3.15 (.72)
Written communication skills	.030	3.20 (.64)	3.21 (.58)	2.96 (.66)	3.42 (.58)
Ability to conceptualize and think clearly	.002	3.69 (.47)	3.58 (.51)	3.50 (.51)	3.93 (.27)
Personal insight	.006	3.63 (.52)	3.29 (.61)	3.62 (.50)	3.81 (.40)
Foresight	.001	3.2 (.60)	2.79 (.70)	3.19 (.49)	3.48 (.51)
Professional presentation of self	.004	3.61 (.52)	3.36 (.63)	3.50 (.51)	3.85 (.36)
Creativity in problem solving	.021	3.37 (.60)	3.07 (.62)	3.31 (.55)	3.59 (.57)
Maturity	.021	3.49 (.61)	3.29 (.91)	3.35 (.49)	3.74 (.45)
A self directed/ motivated approach to work	.022	3.66 (.51)	3.43 (.65)	3.58 (.50)	3.85 (.36)
Willingness to take risks	.025	3.03 (.72)	3.00 (.78)	2.77 (.71)	3.30 (.61)

( ) Standard Deviation

ii) Amount

The amounts required of 12 traits were rated significantly different according to years of program operation. This group of traits was comprised of 6 knowledge items and 6 other personal characteristics. As with ratings of level of importance, managers of programs operating over 10 years rated the amount of trait required higher than the other groups in all significant cases. A linear progression existed for ratings of knowledge of occupational/professional groups within the organization, knowledge of employee assistance professional ethics and values, knowledge of life transitions, a balance between personal and professional life, foresight, assertiveness, and flexibility. Findings are reported in Table 16.

iii) General Analysis

Four traits, knowledge of theories and styles of management, knowledge of relevant clinical modalities, foresight, and a willingness to take risks were viewed as being more important and required to greater degrees by managers in programs that had been operating for over 10 years.

Table 16: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Years Of Program Operation

Trait	Sig. of F Value	Total Group (N=67)	Programs Operating 5 Yrs And Under (N=14)	Programs Operating Over 5 Yrs Thru 10 Yrs (N=26)	Programs Operating Over 10 Yrs (N=27)
Knowledge of the role of the EAP within the organization	.003	3.60 (.52)	3.43 (.51)	3.42 (.58)	3.85 (.36)
Knowledge of relevant clinical modalities	.006	3.09 (.79)	3.00 (.68)	2.77 (.82)	3.44 (.70)
Knowledge of occ/ prof groups within the org.	.008	2.92 (.66)	2.69 (.48)	2.73 (.60)	3.22 (.70)
Knowledge of theories and styles of management	.010	2.63 (.71)	2.57 (.51)	2.35 (.80)	2.93 (.62)
Knowledge of EA prof. ethics and values	.042	3.67 (.61)	3.43 (.65)	3.58 (.70)	3.89 (.42)
Knowledge of life transitions	.048	2.97 (.64)	2.71 (.61)	2.88 (.58)	3.20 (.65)
A willingness to take risks	.012	2.81 (.72)	2.86 (.66)	2.50 (.65)	3.07 (.73)

Table 16: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Years Of Program Operation (cont.)

Trait	Sig. of F Value	Total Group (N=67)	Programs Operating 5 Yrs And Under (N=14)	Programs Operating Over 5 Yrs Thru 10 Yrs (N=26)	Programs Operating Over 10 Yrs (N=27)
Personal/ prof. life balance	.013	3.42 (.58)	3.21 (.70)	3.27 (.53)	3.67 (.48)
Foresight	.018	3.22 (.60)	2.86 (.53)	3.23 (.59)	3.41 (.57)
A desire to learn	.022	3.31 (.61)	3.21 (.70)	3.12 (.59)	3.56 (.51)
Assertiveness	.022	3.42 (.58)	3.07 (.73)	3.42 (.50)	3.59 (.50)
Flexibility	.049	3.40 (.58)	3.07 (.47)	3.46 (.58)	3.52 (.58)

( ) Standard Deviation

Ratings of these traits tended not to have a linear progression over time. For the most part respondents' perceptions of the value of personal characteristics such as maturity, a willingness to take risks, a balance between personal and professional life, a desire to learn, and assertiveness that increased according to the number of years the program had been operating. This finding begged the question of whether or not the same traits were identified as significantly different based on the manager's years of EAP experience. A visual

comparison of the two groups of traits revealed that five traits, knowledge of occupational and professional groups in the organization, knowledge of labour unions in the organization, a desire to learn, a willingness to take risks, and foresight, appeared in findings of analysis of variance according to years of EAP management experience and years of program operation. Given the amount of overlap, this finding is not likely due to chance. One possible explanation may be that respondents with more than 10 years of EAP management experience may tend to be employed in programs that have been operating for over 10 years.

#### (b) Variance Of Ratings According To The Number Of EAP Staff Positions

Respondents were asked to indicate on the questionnaire the number of staff positions their EAP had in each of three categories: management, clinical, and clerical. In many cases the amount of detail expected was not provided. Respondents often identified a combined number of management and clinical positions without identifying numbers in each category. Many respondents did not seem to differentiate between a worker and a staff position. For example one clerical staff person devoting a third of her time to EAP duties would often



be reported as one clerical position rather than .33. Therefore the need existed to regroup this data into categories of one staff person and more than one. This did not allow the type of analysis to be conducted that was intended, however, it is believed to add some valuable insights.

i) Importance

An analysis of variance on whether the program consisted of one, or more than one, staff position yielded the second greatest number of differences in this category of program characteristics. These two groups rated the level of importance of 10 traits significantly different. These traits consisted of 2 knowledge items, 5 skills, and 3 other personal characteristics. Managers of programs with more than one staff position rated 9 of these 10 traits significantly higher than managers of programs with only one staff position. The one trait rated highest by respondents in the sole EAP position was referral skills. One possible explanation for this finding is that referring clients to other sources of help may be necessary in order to deal with the manpower demands of being the sole member of the EAP.

A cluster of traits related to interacting with the organization as well as

the obvious supervisory skills emerged. These traits included knowledge of occupational and professional groups within the organization, knowledge of the role of work in people's lives, analytical skills, assessment skills applied to workplace needs, self confidence, and a professional presentation of self.

A comparison of means is provided in Table 17.

Table 17: Comparison Of Mean Level Of Importance Of Traits Rated Significantly Different According To Whether The EAP Consists Of A Single Staff Position Or More Than One Staff Person

Trait	Significance of F Value	Total Group (N=54)	Programs With One Staff Position (N=33)	Programs With More Than One Staff Position (N=21)
Knowledge of occupa/prof groups within org.	.002	3.09 (.65)	2.88 (.64)	3.43 (.51)
Knowledge of the role of work in people's lives	.048	3.13 (.61)	3.00 (.60)	3.33 (.58)
Supervisory skills	.007	2.89 (.77)	2.67 (.78)	3.24 (.62)
Referral skills	.008	3.59 (.69)	3.79 (.48)	3.29 (.85)
Analytical skills	.014	3.41 (.63)	3.24 (.66)	3.67 (.48)

Table 17: Comparison Of Mean Level Of Importance Of Traits Rated Significantly Different According To Whether The EAP Consists Of A Single Staff Position Or More Than One Staff Person (cont)

Trait	Significance of F Value	Total Group (N=54)	Programs With One Staff Position (N=33)	Programs With More Than One Staff Position (N=21)
Implementation skills	.033	3.56 (.57)	3.42 (.56)	3.76 (.54)
Assessment skills applied to workplace needs	.034	3.37 (.56)	3.24 (.56)	3.57 (.51)
Self confidence	.026	3.55 (.57)	3.41 (.61)	3.76 (.44)
Self direction and self motivation	.033	3.73 (.49)	3.68 (.55)	3.90 (.30)
Professional presentation of self	.034	3.67 (.51)	3.56 (.56)	3.86 (.36)

( ) Standard Deviation

ii) Amount

The amount required of 13 traits obtained significantly different ratings from groups of managers who themselves are the sole staff member of their EAP and those who have other program staff working with them. These traits consisted of 4 knowledge items, 5 skills, 1 ability, and 3 other personal

characteristics. They were all rated higher by managers of programs with more than one staff position. The traits that were rated significantly different tended to relate to interacting with the organization such as knowledge of the organization, knowledge of the occupational and professional groups within the organization, knowledge of the role of work in people's lives, skills in communicating orally with a wide variety of audiences, analytical skills, assessment skills applied to workplace needs, the ability to conceptualize and think clearly, and self confidence. A comparison of means is provided in Table 18.

Table 18: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Whether The EAP Consisted Of A Single Staff Position Or A Staff Of More Than One

Trait	Significance of F Value	Total Group (N=54)	Programs With One Staff Position (N=33)	Programs With More Than One Staff Position (N=21)
Knowledge of occ/prof groups within org.	.014	2.93 (.63)	2.76 (.60)	3.19 (.60)
Knowledge of the role of work in people's lives	.028	2.96 (.61)	2.82 (.58)	3.19 (.60)

Table 18: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Whether The EAP Consisted Of A Single Staff Position Or A Staff Of More Than One (cont.)

Trait	Significance of F Value	Total Group (N=54)	Programs With One Staff Position (N=33)	Programs With More Than One Staff Position (N=21)
Knowledge of relevant clinical modalities	.037	3.24 (.80)	3.06 (.79)	3.52 (.75)
Knowledge of the organization	.039	3.13 (.72)	2.97 (.72)	3.38 (.67)
Assess. skills appl. to work-place needs	.011	3.2593 (.6200)	3.0909 (.6307)	3.5238 (.5118)
Oral communication skills	.015	3.59 (.53)	3.45 (.56)	3.81 (.40)
Analytical skills	.020	3.32 (.64)	3.16 (.68)	3.57 (.51)
Computer skills	.028	2.76 (.78)	2.58 (.75)	3.05 (.74)
Employee selection skills	.048	2.44 (.94)	2.24 (.90)	2.76 (.94)
Ability to conceptualize & think clearly	.021	3.62 (.49)	3.50 (.51)	3.81 (.40)

Table 18: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Whether The EAP Consisted Of A Single Staff Position Or A Staff Of More Than One (cont.)

Trait	Significance of F Value	Total Group (N=54)	Programs With One Staff Position (N=33)	Programs With More Than One Staff Position (N=21)
Desire to learn	.009	3.25 (.61)	3.09 (.62)	3.52 (.51)
Maturity	.022	3.56 (.63)	3.41 (.70)	3.81 (.40)
Self confidence	.038	3.42 (.57)	3.29 (.58)	3.62 (.50)

( ) Standard Deviation

### iii) General Analysis

Five traits were rated higher on both scales by managers of programs with more than one staff position. These included knowledge of the occupational and professional groups within the organization, knowledge of the role of work in people's lives, analytical skills, assessment skills applied to workplace needs, and self confidence. The fact that the majority of traits related to what could be interpreted as the broader scope of larger programs is

not at all surprising. One could assume that managers of programs with more than one staff person have the manpower to move beyond intervention at the individual level to greater involvement in the organization. Another possible explanation is that programs of more than one staff position may exist in larger organizations and that the nature of programs in larger organizations may well be different. This supposition can be further examined in the analysis of variance according to size of organization.

As expected, supervisory skills are seen as more important by those in EAPs consisting of more than one staff position. This stands to reason and adds support to the notion that traits related to tasks performed are more highly valued. Adding further support is the finding that managers of programs with more than one staff position rated employee selection skills higher than those who are alone in the program. This is understandable as employee selection would more likely to be a part of their job than that of the other group of managers.

(c) Variance Of Ratings According To Whether The Program Has A Non-Voluntary Component

i) Importance

An analysis of variance between totally voluntary programs and those with a non-voluntary component revealed a significant difference in ratings of level of importance on four traits. Respondents working in totally voluntary programs rated the level of importance of 2 knowledge items, 1 skill, and 1 personal characteristic significantly higher than those in programs with a non-voluntary component. These traits were related to general management functions (knowledge of theories and styles of management and budgeting skills) and professionalism (knowledge of employee assistance ethics and values). Respondents in programs with a non-voluntary component perceived one personal characteristic as significantly more important than their counterparts, that of patience. A comparison of the means is provided in Table 19.



Table 19: Comparison Of Mean Level Of Importance Of Traits Rated Significantly Different According To Whether The Program Was Totally Voluntary Or Had A Non-Voluntary Component

Trait	Significance of F Value	Total Group (N=71)	Totally Voluntary Programs (N=55)	Programs With Non-Voluntary Component (N=16)
Knowledge of theories and styles of management	.018	2.82 (.62)	2.91 (.59)	2.50 (.63)
Knowledge of EA. ethics and values	.030	3.79 (.48)	3.85 (.40)	3.56 (.63)
Budgeting skills	.011	2.88 (.79)	3.00 (.75)	2.44 (.81)
Patience	.024	3.61 (.55)	3.53 (.54)	3.87 (.50)

( ) Standard Deviation

ii) Amount

The mean amount of trait required varied significantly between those working in totally voluntary programs and those working in programs with a non-voluntary component on ratings of 5 traits: 3 skills and 2 other personal characteristics. Managers of totally voluntary programs rated skills in setting boundaries and saying "no" when appropriate and budgeting skills significantly

higher than managers in programs with a non-voluntary component. Managers of programs that are not totally voluntary rated insight into one's own personal values, strengths, weaknesses, and learning needs, active listening skills, and patience significantly higher than managers of totally voluntary programs. Findings are reported in Table 20.

Table 20: Comparison Of Means Of Amount Of Trait Required For Traits Rated Significantly Different According To Whether The Program Was Totally Voluntary Or Had A Non-Voluntary Component

Trait	Significance of F Value	Total Group (N=71)	Totally Voluntary Programs (N=55)	Programs With Non-Voluntary Component (N=16)
Skills in setting boundaries	.018	3.38 (.62)	3.47 (.60)	3.06 (.57)
Budgeting skills	.021	2.77 (.80)	2.89 (.74)	2.37 (.89)
Active listening skills	.028	3.79 (.45)	3.72 (.49)	4.00 (.00)
Patience	.005	3.52 (.58)	3.42 (.57)	3.87 (.50)
Personal insight	.031	3.50 (.53)	3.43 (.54)	3.75 (.45)

( ) Standard Deviation

iii) General Analysis

Given the small number of significantly different ratings, one possible interpretation of these findings is that they are due solely to chance. However, given that two of these traits appear on both scales one could argue against this possibility in at least one case.

One possible explanation of patience being rated higher by managers of programs with a non-voluntary component is that this trait is more necessary in dealing with the issues related to this type of involvement, such as client resistance and demands from supervisors for confidential information.

No apparent explanation for the appearance of budgeting skills on both scales exists. However, one could speculate that budgeting tasks are more often a part of the manager's job in totally voluntary programs than in non-voluntary programs.

It is not surprising that skills in setting boundaries and saying "no" are more highly valued by managers of voluntary programs. This could be a result of the differing amount of structure and definition of roles between the two

types of programs. One would expect that the need for this trait would be less in programs with a non-voluntary component, as these types of programs tend to have clearer boundaries in their design.

What is surprising is that managers of programs with a non-voluntary component place significantly less importance on knowledge of employee assistance professional ethics and values. One possible explanation for this may be that they perceive less of a need to base their conduct on ethics and values when clear guidelines for conduct may exist in the structure of the non-voluntary component of the program.

Another surprising finding is that managers in totally voluntary programs place less value on insight into one's own personal values, strengths, weaknesses, and learning needs. Since non-voluntary involvement in EAPs is generally the result of structured job performance evaluation, it may hold true that EAP managers themselves go through structured and routine job performance evaluations. If so they would likely be routinely examining their strengths, weaknesses, and learning needs and may have grown to see the value in such awareness.

(d) Variance Of Ratings According To Percentage Of Time Spent On EAP Management Tasks

i) Importance

Managers who spend under 50% of their time performing EAP management functions and those who spend 50% and over performing such tasks, rated the level of importance of three traits significantly different. These traits consisted of 2 knowledge items (knowledge of family dynamics and knowledge of workplace stressors) and 1 personal characteristic (honesty). The mean ratings of those spending under 50% of their time on EAP management tasks were higher in all three cases. Findings are reported in Table 21.

ii) Amount

Ratings of the amounts required of three traits were significantly different between managers spending under 50% of their time performing EAP management tasks and those spending 50% or more of their time on these duties.

Table 21: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Percentage Of Time Spent Performing EAP Management Tasks

Trait	Significance of F Value	Total Group (N=69)	Under 50% EAP Man. (N=40)	50% And Over EAP Man. (N=29)
Knowledge of family dynamics	.018	3.16 (.59)	3.31 (.61)	2.96 (.51)
Knowledge of workplace stressors	.020	3.61 (.49)	3.72 (.45)	3.45 (.51)
Honesty	.013	3.90 (.30)	3.97 (.16)	3.79 (.41)

( ) Standard Deviation

These traits consisted of 2 knowledge items (knowledge of family dynamics knowledge of where and how to recruit EAP staff) and 1 skill (supervisory skills). A comparison of means is provided in Table 22.

Table 22: Comparison Of Mean Amount Of Traits Required For Traits Rated Significantly Different According To Percentage Of Time Spent Performing EAP Management Tasks

Trait	Significance of F Value	Total Group (N=69)	Under 50% EAP Man. (N=40)	50% And Over EAP Man. (N=29)
Knowledge of family dynamics	.006	3.02 (.69)	3.21 (.62)	2.75 (.70)
Knowledge of where and how to recruit EAP staff	.043	2.82 (.76)	2.669 (.71)	3.03 (.78)
Supervisory skills	.028	2.80 (.80)	2.97 (.73)	2.55 (.83)

( ) Standard Deviation

### iii) General Analysis

It is possible that given the low number of significantly different traits, that these findings are due to chance alone. However, the fact that one trait, knowledge of family dynamics, appears on both scales leads to the questioning of this possibility. It is, perhaps, equally possible that this finding can be logically explained. It may be that managers who spend 50% or more of their time performing EAP management functions have less time available to them to engage in clinical intervention with clients so their need for knowledge of

family dynamics and knowledge of workplace stressors is less. This explanation, however, does not account for the fact that other traits related to clinical intervention do not appear here.

The fact that supervisory skills were rated lower by managers spending the majority of their time performing EAP management tasks is surprising. It was previously speculated that managers spending most of their time in EAP management functions would rate supervisory skills higher than the other group of managers. This was not the case. A possible explanation for this might be that managers who share an active role in providing clinical services to clients may be more attune to the value of clinical supervision and therefore place greater value on supervisory skills.

Another expectation was that managers spending the majority of their time performing EAP management tasks would rate traits related to these tasks, such as computer skills, budgeting skills, employee recruitment and selection, higher than other managers. This expectation was largely untrue as knowledge of where and how to recruit EAP staff was the only such trait appearing here.



(e) Variance Of Ratings According To The Program's Point Of Accountability In The Organization

Four groupings were used in this analysis: 1) managers reporting to the chief executive officer, or president, of the organization, 2) managers reporting to the manager, or vice president, of human resources, 3) those reporting directly to a joint labour/management committee, and 4) managers reporting to other points in the organizational structure including safety directors, assistant executive directors or vice presidents, deputy ministers, medical or health services, officers, employee services personnel, and junior executives. It was possible to provide additional groupings by breaking down the "other" category, however, the extremely small size of these groupings would have made the findings questionable.

i) Importance

Managers accountable to varying points in the organizational structures rated the level of importance of two traits significantly different. One skill, computer skills, and 1 other personal characteristic, assertiveness, were identified as being rated significantly different by these groups. Computer

skills were viewed as most important by managers directly accountable to the CEO while assertiveness was perceived as most important by those accountable to the manager of human resources. A comparison of means is provided in Table 23.

Table 23: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To The EAP's Point Of Accountability In The Organizational Structure

Trait	Sig. of F Value	Total Group (N=71)	CEO (N=9)	H.R. (N=36)	Jt. Conm. (N=14)	Other (N=12)
Computer skills	.054	2.65 (.72)	3.22 (.83)	2.50 (.65)	2.71 (.73)	2.58 (.67)
Assertiveness	.032	3.46 (.61)	3.11 (.78)	3.58 (.55)	3.64 (.50)	3.17 (.58)

( ) Standard Deviation

ii) Amount

An analysis of the amount of traits required according to the EAP's point of accountability within the organization revealed that 4 traits were rated significantly different: 1 skill, 2 abilities, and 1 other personal characteristic. These were skills in obtaining necessary financial resources, the ability to

maintain a neutral and objective perspective, the ability to accept and respond to feedback, and creativity in problem solving. All but the ability to maintain a neutral and objective perspective, which was rated highest by those accountable to joint committees, were rated highest by the group of managers directly accountable to "other" points in the organizational structure. A comparison of means is provided in Table 24.

Table 24: Comparison Of Mean Amounts Of Traits Required For Traits Rated Significantly Different According To The EAP's Point Of Accountability Within The Organization

Trait	Sig. of F Value	Total Group (N=70)	CEO (N=9)	H.R. (N=35)	Jt. Com. (N=14)	Other (N=12)
Skills in obtaining financial resources	.013	2.99 (.79)	2.89 (.93)	3.11 (.72)	2.43 (.65)	3.33 (.78)
Ability to maintain a neutral/objective perspective	.041	3.70 (.46)	3.89 (.33)	3.56 (.50)	3.92 (.27)	3.73 (.47)
The ability to accept and respond to feedback	.049	3.55 (.55)	3.78 (.44)	3.39 (.55)	3.58 (.65)	3.83 (.39)
Creativity in problem solving	.019	3.28 (.68)	3.11 (.78)	3.17 (.65)	3.21 (.69)	3.83 (.39)

( ) Standard Deviation

iii) General Analysis

Given that there is no overlap between traits appearing on the two scales, and given the low number of traits found to be statistically significant, it is highly possible that these findings are due to chance alone. However, it is also possible that some of these findings may reflect real, meaningful differences among subgroups.

It is understandable that managers reporting to "other" points in the organizational structure may be working in programs with less stability and security than those reporting to the stable and powerful positions of CEO, human resource manager, or joint labour/management committees. It may well be important to the EAP manager to be creative in problem solving, skilful in obtaining financial resources and able to maintain neutrality and objectivity in order to survive.

(f) Overall Variance According To Program Characteristics

i) Importance

Ratings of the level of importance of 29 traits were significantly different based on program characteristics. Eight of these traits were knowledge items, 9 were skills, 1 was an ability, and 11 were other personal characteristics. The majority of these traits were significantly affected by either the number of years the program had been operating or whether the program consisted of more than one staff person.

Years of program management significantly affected ratings of level of importance of three knowledge items: knowledge of the labour unions within the organization, knowledge of theories and styles of management, and knowledge of relevant clinical modalities. Whether or not the program had a non-voluntary component significantly affected ratings of two traits: knowledge of theories and styles of management and knowledge of employee assistance professional ethics and values. The percentage of time spent performing EAP management tasks significantly affected two knowledge items: knowledge of workplace stressors and knowledge of group dynamics. Whether or not the

program consisted of one or more than one staff position affected knowledge of the role of work in people's lives and knowledge of the occupational and professional groups within the organization. Of particular note is that knowledge of theories and styles of management was affected by two program characteristics: years of program operation and whether the program had a non-voluntary component.

Years of program operation significantly affected ratings of four skills: skills in communicating in written form using a variety of venues, analytical skills, decision making skills, and supervisory skills. Whether the program consists of one or more than one staff position affected five skills: assessment skills applied to workplace needs, analytical skills, implementation skills, follow-up skills, and supervisory skills. Whether the program had a non-voluntary component affected ratings of budgeting skills. The program's point of accountability in the organization significantly affected ratings of computer skills. Of particular note is that two skills, analytical skills and supervisory skills, were rated significantly different according to two program characteristics: years of program operation and whether the program consisted of one or more than one staff person.

Levels of importance of one ability, the ability to conceptualize and think clearly, were significantly affected by years of program operation.

Levels of importance of 11 personal characteristics were significantly affected by program characteristics. Years of program operation affected rating of seven personal characteristics: a willingness to adhere to a set of professional values and ethics, a self directed and self motivated approach to work, a professional presentation of self, foresight, creativity in problem solving, maturity, and insight into one's own personal values, strengths, weaknesses, and learning needs. Whether the program consisted of one or more than one staff position affected ratings of three personal characteristics: a professional presentation of self, a self directed and self motivated approach to work, and self confidence. The percentage of time spent performing EAP management tasks significantly affected perceptions of the level of importance of honesty. Whether the program had a non-voluntary component affected the level of importance of patience. The program's point of accountability in the organizational structure affected perceptions of the level of importance of assertiveness. Two personal characteristics, a professional presentation of self and a self directed and self motivated approach to work, were affected by more than one program characteristic: years of program operation and whether the

program consisted of one or more than one staff position.

ii) Amount

The amount of traits required for 34 of the 96 traits was significantly different based on program characteristics. Ten of these characteristics were knowledge items, 10 were skills, 3 were abilities, and 11 were other personal characteristics.

Six knowledge items were affected by the years of program operation. These included knowledge of the role of the EAP within the organization, knowledge of the occupational and professional groups within the organization, knowledge of employee assistance professional ethics and values, knowledge of theories and styles of management, knowledge of relevant clinical modalities, and knowledge of life transitions. Four knowledge items were affected by whether the program consisted of one or more than one staff position: knowledge of the organization, knowledge of the occupational and professional groups within the organization, knowledge of the role of work in people's lives, and knowledge of relevant clinical modalities. The percentage of time spent on EAP management tasks significantly affected ratings of



knowledge of family dynamics and knowledge of where and how to recruit EAP staff. Two knowledge items, knowledge of occupational and professional groups within the organization and knowledge of relevant clinical modalities were affected by more than one program characteristic: years of program operation and whether the program consists of one or more than one staff position.

Nine skills were significantly affected by program characteristics. Whether the program consisted of one or more than one staff position affected perceptions of the amount required of five skills: skills in communicating orally with a wide variety of audiences, assessment skills applied to workplace needs, analytical skills, employee selection skills, and computer skills. Whether or not the program had a non-voluntary component affected ratings of two skills: skills in setting boundaries and saying "no" and budgeting skills. The percentage of time spent performing EAP management tasks significantly affected ratings of the amount of supervisory skills required. The program's point of accountability in the organizational structure affected the amount of skill required in obtaining necessary financial resources. None of the skills were affected by more than one program characteristic.

Three abilities were significantly affected by program characteristics. The program's point of accountability in the organization affected ratings of two abilities: the ability to conceptualize and think clearly and the ability to accept and respond to feedback. Whether the program had one or more than one staff position significantly affected the ability to maintain a neutral and objective perspective.

Ten personal characteristics were significantly affected by program characteristics. The number of years of program operation affected six personal characteristics: a willingness to adhere to a set of professional values and ethics, a desire to learn, assertiveness, foresight, flexibility, and an established balance between personal and professional life. Whether the program consisted of one or more than one staff position affected ratings of three personal characteristics: a desire to learn, self confidence and maturity. Whether the program had a non-voluntary component significantly affected ratings of two personal characteristics: patience and insight into one's own personal values, strengths, weaknesses, and learning needs. The program's point of accountability in the organizational structure significantly affected the amount required of creativity in problem solving. One personal characteristic, a desire to learn, was also affected by two program characteristics: years of

program operation and whether the program consisted of one or more than one staff position.

iii) General Analysis

Significantly different ratings of nineteen traits appeared on both of the scales. Five were knowledge items: knowledge of the occupational and professional groups within the organization, knowledge of employee assistance professional ethics and values, knowledge of the role of work in people's lives, knowledge of theories and styles of management, and knowledge of clinical modalities. Five were skills: assessment skills applied to workplace needs, analytical skills, supervisory skills, budgeting, and computer skills. One was an ability: the ability to conceptualize and think clearly. The greatest number, eight, were personal characteristics: a willingness to adhere to a set of professional values and ethics, self confidence, assertiveness, patience, foresight, creativity in problem solving, maturity, and insight into one's personal values, strengths, weaknesses, and learning needs.

The type of traits affected by program characteristics tended to be related to interacting with the organization and performing general management

tasks. The size of the program, in terms of whether the EAP consisted of one or more than one staff position, and the program's stage of development, in terms of the number of years it had been operating, had the most affect on the importance attributed to the identified EAP management traits. Knowledge of theories and styles of management, analytical skills, supervisory skills, a professional presentation of self, and a self directed and self motivated approach to work were particularly sensitive to program characteristics demonstrated by having been affected by more than one characteristic.

The nature of the EAP management job was affected by program design characteristics as expected. The nature of the job and the tasks performed have clearly influenced ratings of the level of importance of management traits.

#### Analysis Of Variance According To Organization Characteristics

Survey data provided the necessary information to analyze the variance between mean trait ratings according to: 1) the organization characteristics of whether or not the majority of employees belonged to labour unions; 2) the size of the organization; 3) the type of industry in which the organization

exists; 4) and the gender ratio of employees. An analysis of variance between managers in organizations where the majority of employees belonged to labour unions and those where 50% or fewer employees belonged to unions yielded the most significant differences of the four organization characteristics.

(a) Variance Of Ratings According To The Percentage Of Employees  
Belonging To Unions

i) Importance

The mean level of importance of eight traits were found to be significantly different based on the percentage employees belonging to labour unions. These traits included 2 knowledge items, 2 skills, 1 ability, and 3 other personal characteristics. The mean level of importance of all eight traits was higher for managers in organizations with 50% or fewer unionized employees. A comparison of means of the two groups is provided in Table 25.

Table 25: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To Whether The Majority Of Employees In The Workplace Belong To Labour Unions

Trait	Significance of F Value	Total Group (N=68)	50% And Fewer Unionized Employees (N=11)	Over 50% Of Employees Unionized (N=57)
Knowledge of the role of work in people's lives	.004	3.07 (.61)	3.55 (.52)	2.98 (.58)
Knowledge of the organization	.005	3.43 (.63)	3.91 (.30)	3.33 (.64)
Follow-up skills	.027	3.19 (.63)	3.60 (.52)	3.12 (.63)
Crisis counselling skills	.035	3.32 (.79)	3.80 (.42)	3.23 (.81)
Ability to accept/respond to feedback	.033	3.60 (.52)	3.91 (.30)	3.54 (.54)
Intuition	.015	3.13 (.62)	3.55 (.52)	3.05 (.61)
A desire to learn	.018	3.44 (.58)	3.82 (.40)	3.37 (.59)
A sense of humour	.047	3.49 (.61)	3.82 (.40)	3.42 (.63)

( ) Standard Deviation

ii) Amount

An analysis of variance of mean amounts of traits required based on whether the EAP existed in an organization with 50% or fewer unionized employees or whether more than half of the organization's employees were belonged to labour unions yielded six traits with significantly different means. These traits included 1 knowledge item, 1 skill, and 4 other personal characteristics. As with ratings on the level of importance scale, mean ratings for all six traits were higher where 50% or fewer of the organization's employees belonged to labour unions. A comparison of means is provided in Table 26.

iii) General Analysis

Significantly different ratings of knowledge of the organization in which the EAP exists, a developed and reliable sense of intuition, and a desire to learn occurred on both scales. These traits, therefore, can be interpreted as having the greatest sensitivity to whether the majority of employees are unionized or not. Both the level of importance attributed to them and the

Table 26: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To Whether The Majority Of Employees In The Workplace Belong To Unions

Trait	Significance of F Value	Total Group (N=68)	50% And Fewer Unionized Employees (N=11)	Over 50% Unionized Employees (N=57)
Knowledge of the organization	.013	3.12 (.76)	3.64 (.67)	3.02 (.74)
Skills in validating and re-enforcing people's strengths	.035	3.31 (.62)	3.70 (.48)	3.25 (.63)
Intuition	.011	3.09 (.66)	3.55 (.52)	3.00 (.65)
Interest in and commitment to the job	.023	3.69 (.50)	4.00 (.00)	3.63 (.52)
Credibility	.030	3.743 (.44)	4.00 (.00)	3.68 (.47)
A desire to learn	.038	3.29 (.60)	3.64 (.50)	3.23 (.60)

( ) Standard Deviation

amount thought to be required were significantly higher in organizations where 50% or fewer employees were unionized.



One possible explanation for these findings is that the union, where the majority of employees are unionized may take on some of the roles otherwise provided by employee assistance, thereby decreasing the need for traits related to these roles. These findings could be interpreted to indicate that tasks related to the role of work in people's lives, "getting around" in the organization in which the program exists, and providing crisis intervention may be performed to a lesser extent in EAPs where the majority of potential clients belong to unions.

Another possible explanation could be related to other characteristics of organizations where the majority of employees tend to be unionized. Such organizations are typically large with more structure and standardization regarding roles and interactions. If this is true, it makes sense that there would be less need for and therefore less value placed on intuition, learning new things, and knowing one's way around the organization.

The consistent top rating of a genuine interest and commitment to the job by managers of EAPs in organizations where fewer than 50% of employees belong to labour unions is of interest. Although the sample size is relatively small (N=11), the fact that every manager in this group gave this trait the

highest possible rating is of great interest. One possible explanation for this is that these managers value the looser structure often associated with an organization of minimal unionization and have a high degree of interest and commitment to their job and therefore rated this trait accordingly.

Of great surprise is the fact that knowledge of labour unions within the organization, including their role, history within the organization, and means of operating, is not significantly affected by the percentage of employees that are unionized. This finding disproves the earlier expectation that such a finding would occur.

( b) Variance Of Ratings According To The Size Of The Organization

i) Importance

The size of the organization in which the EAP exists was found to significantly affect ratings of the level of importance of four traits, all skills. Mean ratings of managers of programs in organizations of under 1,000 employees, those in organizations employing between 1,001 and 3,000

employees, managers of programs in organizations of between 3,001 and 5,000 employees, and those who's EAPs exist within an organization of over 5,000 employees were significantly different for: skills in obtaining necessary financial resources, skill in providing constructive feedback, follow-up skills, and analytical skills. A comparison of these ratings is provided in Table 27.

Table 27: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To The Size Of The Organization In Which The EAP Exists

Trait	Sig. of F Value	Total Group (N=71)	Under 1,000 (N=14)	1,001 to 3,000 (N=26)	3,001 to 5,000 (N=8)	Over 5,000 (N=23)
Skills in obtaining financial resources	.007	3.09 (.79)	2.92 (.64)	3.08 (.89)	2.37 (.52)	3.43 (.66)
Skill in providing constructive feedback	.020	3.50 (.58)	3.71 (.47)	3.28 (.68)	3.25 (.46)	3.70 (.47)
Follow-up skills	.029	3.21 (.63)	3.50 (.52)	3.32 (.63)	2.75 (.46)	3.09 (.67)
Analytical skills	.031	3.36 (.64)	3.00 (.55)	3.28 (.68)	3.62 (.52)	3.57 (.59)

( ) Standard Deviation

ii) Amount

The mean amount of trait required was significantly different for seven traits based on the size of organization in which the EAP exists. These traits included 2 knowledge items, 4 skills, and 1 other personal characteristic: knowledge of how to access relevant resources both within the organization and the external environment, skills in setting boundaries and saying "no" when appropriate, consultation skills, skills in obtaining necessary financial resources, skills in communicating in written form using a variety of venues, and tolerance for frustration and stress. Table 28 provides a comparison of these mean ratings.

iii) General Analysis

Traits rated significantly different according to the size of the organization in which the EAP exists tend to be related to interacting with the organization, for example, knowledge of how to access relevant resources in the organization, skills in setting boundaries and saying "no" when appropriate, consultation skills, skills in obtaining necessary financial resources, skills in

Table 28: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Size Of The Organization In Which The EAP Exists

Trait	Sig. of F Value	Total Group (N=71)	Under 1,000 (N=14)	1,001 to 3,000 (N=26)	3,001 to 5,000 (N=8)	Over 5,000 (N=23)
Knowledge of relevant resources in the organization	.000	3.37 (.64)	3.64 (.50)	3.46 (.51)	2.50 (.53)	3.39 (.66)
Knowledge of relevant resources in the external environment	.027	3.63 (.57)	3.71 (.47)	3.84 (.37)	3.25 (.71)	3.48 (.67)
Skills in setting boundaries	.006	3.38 (.62)	3.00 (.55)	3.27 (.67)	3.62 (.52)	3.65 (.49)
Consultation skills	.034	3.30 (.68)	2.86 (.77)	3.35 (.63)	3.25 (.71)	3.52 (.59)
Skills in obtaining financial resources	.040	2.99 (.79)	2.77 (.60)	3.08 (.80)	2.37 (.74)	3.22 (.80)
Oral communication skills	.044	3.21 (.63)	2.86 (.53)	3.16 (.69)	3.37 (.52)	3.43 (.59)
Tolerance for frustration and stress	.019	3.45 (.60)	3.07 (.62)	3.62 (.50)	3.75 (.46)	3.39 (.66)
Written communication skills	.044	3.21 (.63)	2.86 (.53)	3.16 (.69)	3.37 (.52)	3.43 (.59)

( ) Standard Deviation

communicating in written form using a variety of venues, analytical skills, and tolerance for frustration and stress.

Caution should be used in interpreting implications regarding organizations of 3,001 to 5,000 employees due to the small sample size of this group. In fact, the entire findings could potentially be affected by the size of this group. However, some findings do stand out as logical.

Skills in obtaining necessary financial resources appears in variances on both scales. The level of importance and the amount of skill required is rated highest by managers of programs in the largest organizations. If one assumes that in larger organizations the EAPs themselves are larger, this finding makes sense. Managerial tasks, such as obtaining necessary financial resources could be more a part of the job in larger EAPs where other staff would likely be tending to the majority of the direct service responsibilities. Also, large programs would require larger amounts of finances and there may be more effort required to obtain these larger amounts.

It is interesting to note that contrary to what might be expected, there

are few linear progressions in these findings. It would have been understandable if the level of importance or amount of traits required increased as the size of the organization increased. The only traits for which this progression occurred were skills in setting boundaries and saying "no" when appropriate and skills in communicating in written form using a variety of venues. These findings are understandable. With increasing demands of increasing numbers of people, the ability to set boundaries and say "no" would also be expected to increase, as it does. In addition, one would expect that with increasing numbers of people with whom to communicate the need to do this is writing rather than in person would increase, as is found.

The analysis suggests that managers in programs in smaller organizations perceive greater amounts of knowledge of how to access resources both within and outside of the organization to be needed than managers of programs in larger organizations. A possible explanation for this finding is that the job of the manager in smaller organizations has a larger component of tasks related to direct intervention, and given the demands, the reliance on other resources to decrease the load could be greater.

(c) Variance Of Ratings According To The Type Of Industry In Which  
The EAP Exists

i) Importance

Managers of EAPs in 10 categories of industries rated the level of importance of four traits significantly different. These traits consisted of 2 knowledge items, 1 ability, and 1 other personal characteristic: knowledge of industrial relations, knowledge of where and how to recruit EAP staff, the ability to be sensitive to and respectful of differences in individuals and groups, and a fair and consistent approach to people. A comparison of ratings of level of importance of traits according to the industry in which the EAP exists is provided in Table 29.

ii) Amount

Managers of EAPs in the 10 categories of industries rated the amount of trait required significantly different on 2 traits, 1 knowledge item and 1 other personal characteristics. These significant traits were knowledge of industrial relations and credibility. A comparison of the ratings of these groups



Table 29: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To The Industry In Which The EAP Exists

Trait	Sig. of F Value	Total Group (N=71)	Health Care (N=10)	Social Services (N=3)	Manufacturing (N=5)	Business (N=3)	Education (N=5)	Transportation (N=3)	Utilities/Communication (N=8)	Government (N=19)	Police (N=7)	Other (N=6)
Knowledge of industrial relations	.004	2.70 (.76)	2.90 (.88)	2.33 (.58)	3.00 (.00)	2.33 (.58)	2.60 (.55)	2.67 (1.15)	2.87 (.64)	3.00 (.69)	1.57 (.53)	2.80 (.45)
Knowledge of recruitment	.033	2.94 (.83)	3.20 (.63)	3.00 (.00)	1.80 (.45)	2.33 (.58)	3.20 (.45)	2.33 (.58)	3.25 (1.03)	3.11 (.83)	3.14 (.69)	2.60 (1.14)
Sensitivity and respect	.039	3.78 (.42)	3.70 (.48)	3.33 (.58)	4.00 (.00)	4.00 (.00)	3.40 (.55)	4.00 (.00)	3.87 (.35)	3.95 (.23)	3.57 (.53)	3.67 (.526)
A fair and consistent approach to people	.007	3.85 (.36)	3.90 (.32)	3.67 (.58)	4.00 (.00)	3.00 (.00)	3.60 (.55)	4.00 (.00)	4.00 (.00)	3.89 (.32)	4.00 (.00)	3.67 (.52)

( ) Standard Deviation

is reported in Table 30.

iii) General Analysis

Given the small number of traits generated in this analysis it is possible that findings are due to chance alone. Findings are further questionable as the size of the industry groupings is very small in many cases, for example, business administration, social services, and transportation have only 3 respondents each, manufacturing and education only 5 each, "other" has 6, police 7, and utilities/communications 8. These very small sample sizes suggest that it would be erroneous to draw conclusions from these findings.

(d) Variance Of Ratings According To The Gender Ratio Of Employees In The Organization

i) Importance

Managers in organizations with 50% or fewer female employees rated the level of importance of one trait, a willingness to adhere to a set of professional values and ethics, significantly higher than their counterparts in organizations where over 50% of employees are female. Table 31 reports the mean ratings of importance for this trait based on the gender ratio of employees.

Table 30: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Industry In Which The EAP Exists

Trait	Sig. of F Value	Total Group (N=71)	Health Care (N=10)	Social Services (N=3)	Manufacturing (N=5)	Business (N=3)	Education (N=5)	Transportation (N=3)	Util/Comm (N=8)	Government (N=19)	Police (N=7)	Other (N=6)
Knowledge of industrial relations	.034	2.58 (.70)	2.90 (.74)	2.33 (.58)	2.60 (.55)	2.33 (.58)	2.40 (.55)	3.00 (1.00)	2.62 (.52)	2.67 (.69)	1.71 (.49)	3.00 (.71)
Credibility	.034	3.74 (.44)	3.30 (.48)	3.67 (.58)	3.80 (.45)	3.67 (.58)	3.60 (.55)	4.00 (.00)	4.00 (.00)	3.74 (.45)	4.00 (.00)	3.83 (.41)

( ) Standard Deviation

Table 31: Comparison Of Mean Level Of Importance For Traits Rated Significantly Different According To The Gender Ratio Of Employees In The Organization

Trait	Sig. of F Value	Mean Total Group (N=65)	Mean 50% Or Fewer Female Employees (N=37)	Mean Over 50% Female Employees (N=28)
A willingness to adhere to a set of professional values and ethics	.003	3.83 (.45)	3.97 (.16)	3.64 (.62)

( ) Standard Deviation

ii) Amount

Based on the gender ratio of employees in the organization, the mean ratings of the amount of trait required for six traits were rated significantly different. These traits included 1 knowledge item, 3 skills, and 2 other personal characteristics: knowledge of relevant resources available in the external environment, referral skills, follow-up skills, networking skills, a fair and consistent approach to people, and credibility. The mean ratings of the group of managers in organizations where the minority of employees were female were higher for all six traits. Means for this analysis of variance are reported in Table 32.

Table 32: Comparison Of Mean Amount Of Trait Required For Traits Rated Significantly Different According To The Gender Ratio Of Employees

Trait	Sig. of F Value	Total Group (N=65)	50% Or Fewer Female Employees (N=37)	Over 50% Female Employees (N=28)
Knowledge of relevant resources available in the external environment	.004	3.65 (.54)	3.81 (.40)	3.43 (.63)
Referral skills	.001	3.45 (.73)	3.70 (.57)	3.11 (.79)
Follow-up skills	.003	3.18 (.70)	3.40 (.55)	2.89 (.79)
Networking skills	.021	3.38 (.63)	3.54 (.56)	3.18 (.67)
A fair and consistent approach to people	.027	3.75 (.47)	3.86 (.35)	3.61 (.57)
Credibility	.037	3.74 (.44)	3.84 (.35)	3.61 (.57)

( ) Standard Deviation

### iii) General Analysis

One notable finding in this analysis is that there is no overlap of traits between scales. Given only one trait was generated for one of the scales, the

opportunity of overlap was minimal, however, this one trait could have appeared on the second scale.

Another notable finding is that managers in organizations with 50% or fewer female employees rated all the significant traits lower than their counterparts in organization where over 50% of employees are women. This is contrary to what might have been expected. Given the types of problems women in society tend to have, such as child care, elder care, and battering, one would have expected EAP managers in organizations where the majority of employees are female to rate traits such as knowledge of relevant resources available in the external environment, referral skills, and follow-up skills higher than the other group. The opposite, however, was found. No plausible explanation exists for this finding.

One could anticipate some overlap of findings between gender ratio of employees and type of industry given that some industries tend to be dominated by one gender or the other. Credibility and a fair and consistent approach to people appear in both analyses. In order to be consistent one would expect these traits to be rated lowest in female dominated industries such as health care, education, and social services. This in fact tended to be

the case.

(e) Overall Variance Of Ratings According To Characteristics Of The Organization In Which The EAP Exists

i) Importance

The levels of importance of 16 traits were significantly affected by characteristics of the organization in which the EAP exists. Five of these traits were knowledge items, 4 were skills, 2 abilities, and 5 other personal characteristics.

The percentage of employees belonging to labour unions significantly affected ratings of three knowledge items: knowledge of the formal decision making process of the organization, knowledge of the role of work in people's lives, and knowledge of crisis theory. The type of industry in which the EAP exists significantly affected ratings of knowledge of industrial relations and knowledge of where and how to recruit EAP staff.

The size of the organization in which the EAP exists significantly affected ratings of four skills: proficiency in providing constructive feedback, analytical skills, follow-up skills, and skills in obtaining the necessary financial resources. The percentage of unionized employees significantly affected ratings of follow-up skills. Follow-up skills was the only skill affected by more than one organization characteristic.

The type of organization in which the EAP exists significantly affected the rating on one ability: the ability to be sensitive to and respectful of differences in individuals and groups. The percentage of employees belonging to unions significantly affected ratings of one ability as well: the ability to accept and respond to both positive and negative feedback.

Percentage of unionized employees significantly affected ratings of three personal characteristics: a desire to learn, a developed and reliable sense of intuition, and a sense of humour. The type of industry in which the program exists significantly affected ratings of one personal characteristic: a fair and consistent approach to people. Finally, the gender ratio of employees significantly affected one personal characteristic: a willingness to adhere to a set of professional values and ethics.



ii) Amount

The mean amount of traits required was significantly affected by organization characteristics in 17 cases. These included 4 knowledge items, 7 skills, and 6 other personal characteristics.

The size of the organization in which the EAP exists significantly affected ratings of two knowledge items: knowledge of how to access relevant resources in the organization and knowledge of the relevant resources available in the external environment. The percentage of employees belonging to labour unions significantly affected ratings of one knowledge item: knowledge of the organization, including history, philosophy, culture, rituals, goals, and values. The type of industry in which the program exists affected ratings of one knowledge item: knowledge of industrial relations. The gender ratio of employees significantly affected ratings of the amount required of knowledge of the relevant resources available in the external environment.

The size of the organization in which the program exists significantly affected ratings of the amount required of four skills: skills in communicating in written form using a variety of venues, consultation skills, skills in setting

boundaries and saying "no" when appropriate, and skills in obtaining necessary financial resources. The gender ratio of employees significantly affected ratings of two skills: referral skills and networking skills. The percentage of employees belonging to labour unions significantly affected ratings of one skill: skills in validating and re-enforcing people's use of their strengths.

Characteristics of the organization did not have any significant affect on ratings of abilities.

The percentage of employees belonging to unions significantly affected ratings of four personal characteristics: a genuine interest and commitment to the job, a desire to learn, a developed and reliable sense of intuition, and credibility. The gender ratio of employees significantly affected ratings of two personal characteristics: credibility and a fair and consistent approach to people. The size of the organization in which the program exists significantly affected ratings of one personal characteristic: tolerance for frustration and stress. The type of industry in which the EAP exists affected ratings of the amount required of one personal characteristic: credibility. Credibility had the greatest sensitivity to characteristics of the organization as demonstrated by the significant affects of three such characteristics on its ratings.

iii) General Analysis

The organization characteristics of percentage of employees unionized and size of the organization had the most affect on ratings. The type of traits tending to be affected by organizational characteristics were related to general management tasks, and tasks related to interacting with the organization. As one would expect, it appears that characteristics of the organization in which the program exists affects the nature of the EAP management job in terms of the tasks important to it, and consequently the traits required to perform these tasks. As expected, characteristics of the organization had fewer effects on ratings of the traits than characteristics of the program. This is consistent with the premise that the nature of the organization effects the nature of the EAP which in turn effects the nature of the EAP management job. Based on this premise one would expect fewer effects as characteristics of the organization are one step further removed.

Summary Of Variance Of Ratings According To Respondent, Program, and Organization Characteristics

An examination of the combined affects of respondent, program, and organization characteristics on the level of importance of traits yielded findings that the levels of importance of 65 of the 96 traits (68%) were rated significantly different according to one or more characteristic. Eighteen knowledge items (69%), were affected by one or more characteristic, 26 skills (67%), 3 abilities (38%), and 18 personal characteristics (75%) were affected by one or more characteristic of respondents, programs, or organizations. Twenty eight of these 65 traits were significantly affected by more than one of these characteristics.

i) Importance

The mean levels of importance of five knowledge items were significantly affected by two characteristics. Knowledge of the formal decision making process in the organization was affected by respondents' years of EAP management experience and whether or not the majority of the organization's employees were unionized. Knowledge of the role of work in people's lives

was affected by whether or not the majority of employees were unionized and whether the program consisted of more than one staff person. Knowledge of systems theory was affected by the level of education and the professional background of respondents. Knowledge of clinical modalities was affected by the level of education of the respondent as well as the number of years the program had been operating. Knowledge of group dynamics was affected by the gender ratio of employees in the organization and the respondent's years of EAP management experience.

Two knowledge items, knowledge of crisis theory and knowledge of the labour unions within the organization, were significantly affected by three characteristics. In both of these cases, the respondent's years of EAP management experience was a factor. In addition, the professional background of the respondent and whether or not the majority of employees in the organization were unionized affected the ratings of knowledge of crisis theory, while the respondent's level of education and the number of years the program had been operating affected ratings of knowledge of labour unions within the organization.

Nine of the skills with significantly different mean levels of importance

were affected by two characteristics. Skills in validating and re-enforcing people's use of their strengths, clinical skills in brief treatment, and clinical skills in couples counselling were significantly affected by both the respondent's professional background and level of education. Skills in providing constructive feedback were affected by respondents' level of education and the size of the organization. Ratings of the level of importance of decision making skills were affected by the level of education of respondents and the number of years the program had been operating. The levels of importance of implementation skills were affected by both the respondent's level of education and whether the program consisted of one or more than one staff position. Time management skills were affected by the professional background of respondents and respondents' years of EAP management experience. Supervisory skills were affected the number of years the program had been operating and whether the program consisted of one or more than one staff position. Ratings of the importance of follow-up skills were significantly affected by the size of the organization and whether or not the majority of employees belonged to unions.

Ratings of the level of importance of assessment skills applied to workplace needs were significantly affected by three characteristics:

respondents' professional background, their level of education, and whether the program consisted of more than one staff person. The levels of importance of analytical skills were significantly affected by four characteristics: respondents' level of education, the number of years the program had been operating, whether the program consisted of one or more than one staff position, and the size of the organization.

None of the abilities were found to be affected by more than one characteristic.

The mean levels of importance of seven personal characteristics were affected by two characteristics. Perceptions of the importance of a professional presentation of self and a self directed and self motivated approach to work were significantly affected by the number of years the program had been operating and whether or not the program consisted of one or more than one staff position. Ratings of the importance of a desire to learn and a sense of humour were affected by the professional background of respondents and whether the majority of employees belonged to unions. Perceptions of the importance of foresight were significantly affected by the number of years the program had been operating and the respondent's years of EAP management

experience. Ratings of the level of importance of flexibility were significantly affected by the gender of the respondent and the respondent's level of education. Levels of importance of stability in life were affected by the gender of the respondent and the respondent's years of EAP management experience.

Ratings of the level of importance of a willingness to adhere to a set of professional values and ethics was affected by four characteristics: respondents' professional background, respondents' years of EAP management experience, the number of years the program had been operating, and the gender ratio of employees in the organization.

ii) Amount

An examination of the affects of the three categories of characteristics on ratings of the amount of each trait required yielded findings that 70 of the 96 traits (73%) were significantly affected by one or more characteristics. Twenty one knowledge items (84%), 25 skills (64%), 4 abilities (50%), and 20 personal characteristics (83%) were significantly affected by these characteristics. Twenty five of the 70 traits were affected by two or more characteristics.



The mean amount of six knowledge items were significantly affected by two characteristics. Perceptions of the amount of systems theory knowledge required were significantly affected by respondents' level of education and their professional background. Ratings of the amount of knowledge of life transitions believed necessary were significantly affected by the level of education and the number of years the program had been operating. Ratings of the knowledge of group dynamics were affected by respondents' level of education and respondents' years of EAP management experience. Perceptions of the amount of knowledge of industrial relations required for the job were significantly affected by the professional background of respondents and the type of industry in which their EAP existed. Ratings of the amount of knowledge of the organization were affected by whether or not the majority of employees belonged to labour unions and whether the program consisted of one or more than one staff position. Ratings of the amount of knowledge of external resources required were affected by the gender ratio of employees and the size of the organization.

One knowledge item, knowledge of the occupational/professional groups within the workplace, was rated significantly different according to three characteristics: the respondent's years of EAP management experience, the

number of years the program had been operating, and whether the program consisted of more than one staff person. Ratings of the amount of knowledge of relevant clinical modalities necessary were affected by four characteristics: respondents' level of education, respondents' professional background, the number of years the program had been operating, and whether or not the program consisted of one or more than one staff position. Ratings of the amount of knowledge of crisis theory were affected by four characteristics, all related to the respondent: level of education, professional background, years of EAP management experience, and gender.

Ratings of the amount required of nine skills were significantly affected by two characteristics. Two skills, analytical skills and employee selection skills, were significantly affected by the gender of the respondent and whether or not the program consisted of one or more than one staff position. Oral communication skills and assessment skills applied to workplace needs were significantly affected by the respondent's level of education and whether or not the program consisted of more than one staff position. Perceptions of the amount of written communication skills and consultation skills required were significantly affected by the respondent's level of education and the size of the organization. Skills in validating and re-enforcing people's use of their

strengths were significantly affected by respondents' level of education and whether or not the majority of employees belonged to unions. Ratings of the amount of skill required in setting boundaries and saying "no" were significantly affected by whether or not the program had a non-voluntary component and the size of the organization. Ratings of the amount of skill required in obtaining necessary financial resources were affected by the point of accountability of the program as well as the size of the organization.

Three personal attributes, patience, foresight, and a developed and reliable sense of intuition, were affected by two characteristics. Each of these traits were affected by the respondent's years of EAP management experience while whether or not the program had a non-voluntary component also affected the amount of patience seen as required, the number of years the program had been operating also affected the amount of foresight required, and whether or not the majority of employees belonged to labour unions affected the amount of intuition required. Ratings of tolerance for frustration and stress were affected by three characteristics: the respondent's level of education, the respondent's professional background, and the size of the organization. The amount of credibility thought to be required was also affected by three characteristics, all related to the organization: the gender ratio of employees,

the type of industry in which the program exists, and whether the majority of employees were unionized. Ratings of the amount of desire to learn were significantly affected by four characteristics: the number of years the program had been operating, whether the program consisted of more than one staff position, whether the majority of employees were unionized, and the respondent's years of EAP management experience.

### iii) General Analysis

Eighty four of the 96 traits (88%) were affected, either in terms of the level of importance or the amount required, by at least one characteristic of the respondents, programs, and organizations: 20 of the 25 knowledge items (92%), 30 of the 39 skills (77%), 5 of the 8 abilities (63%), and 26 of the 27 personal characteristics (96%).

Of the three categories of characteristics, those related to respondents affected the greatest number of traits. The level of education and professional backgrounds of respondents had the greatest effect. These characteristics tended to influence ratings of knowledge and skill related to clinical interventions. Characteristics related to the program affected the second

greatest number of traits, with whether the program consisted of one or more than one staff position and the number of years the program had been operating providing the greatest influence on ratings. These characteristics tended to have the most affect on traits related to interacting with the organization. Characteristics of the organization had the least affect on ratings. In this category, the percentage of employees belonging to labour unions and the size of the organization had the most affect, tending to influence traits related to general management tasks and interacting with the organization.

### **Additional Traits Identified**

Survey respondents were asked to identify any other knowledge, skills, abilities, or other characteristics important to the management of an internal, broad-brush EAP. Twenty-eight traits were suggested as important to EAP management, consisting of 10 knowledge items, 4 skills, 1 ability, and 13 other personal characteristics.

#### **Knowledge**

- 1) knowledge of one's own limitations in providing assistance to employees.

- 2) knowledge of differences between helping, enabling, and resolving.
- 3) knowledge of policy development.
- 4) knowledge of chronic health concerns.
- 5) knowledge of the affects of change in the workplace.
- 6) knowledge of how to integrate the program into the organization.
- 7) knowledge of current trends in employee assistance.
- 8) knowledge of current trends in the industry in which the organization exists.
- 9) knowledge of spiritual development.
- 10) knowledge of how to work within a political environment.

### Skills

- 1) skills in balancing competing interests of several parties.
- 2) psychotherapy skills.
- 3) vocational testing skills.
- 4) skills in working as a member of a team.

### Abilities

- 1) the ability to keep focused.

### Other Personal Characteristics

- 1) discretion.
- 2) compassion.
- 3) empathy.
- 4) a genuine like of people.
- 5) forward thinking.
- 6) trustworthiness.
- 7) humility.
- 8) reliability.
- 9) outgoing.
- 10) capacity to work alone.
- 11) sound judgement.
- 12) a forgiving attitude.
- 13) pride in one's work.

The majority of these additional traits can be seen as falling into four categories: 1) traits related to increasing knowledge and skill in particular content areas; 2) traits related to increasing one's effectiveness in providing direct service to employees; 3) traits valued as personal characteristics; and 4) traits related to working within the context of an organizational structure.

Content areas identified include knowledge of chronic health concerns, knowledge of the affects of change in the workplace on people's lives, knowledge of spiritual development, knowledge of new developments in the industry, knowledge of new developments in the field of employee assistance, vocational testing skills, and team work skills.

Traits related to increasing one's effectiveness in direct service to employees included psychotherapy skills, knowledge of one's own limitations in providing assistance, and knowledge of the differences between helping, enabling, and resolving.

A number of personal characteristics identified as valued in interactions with others included a forgiving attitude, reliability, humility, trustworthiness, a genuine like of people, empathy, compassion, and discretion.

Traits related to working within the context of an organization included skills in balancing competing interests of several parties, knowledge of how to work within a political environment, knowledge of how to integrate the program into the organization, and knowledge of policy development.



Although the level of importance and amount of trait required cannot be rated in this study, nor can any interpretations of the contexts in which these traits might be of most importance or required to the greatest extent, these additional traits are of value to recognize and should be considered in further research. If these traits were found to be important to internal, broad-brush EAP managers, or subgroups of managers, many of them could be developed or enhanced through professional curriculums or professional development training courses. The number of additional personal characteristics identified may suggest that screening for these type of valued characteristics is important.

### **Possible Affects of Fatigue And Desirability On Survey Responses**

The design of the questionnaire included three subtle negative traits, aggressiveness, cunningness, and aloofness. These traits were included in the listing of other personal characteristics, the last category of traits, in attempt to gather a rough indication of the possible affects of fatigue and or social desirability. These means, as well as the means for all traits in this final category are reported in Table 33.

Table 33: Mean Ratings Of Personal Characteristics

Personal Characteristics	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number of Ratings
Honesty	3.89	.32	3.86	.35	71
Credibility	3.89	.32	3.75	.44	71
Fair and consistent approach to people	3.86	.35	3.73	.56	71
Willingness to adhere to prof. ethics	3.85	.44	3.77	.42	71
Interest and commitment to job	3.80	.40	3.70	.49	71
Self motivation and self direction	3.66	.51	3.58	.55	71
Personal insight	3.63	.51	3.50	.53	71
Professional presentation of self	3.62	.52	3.65	.51	71
Flexibility	3.62	.57	3.44	.58	71
Patience	3.61	.55	3.52	.58	71
Self confidence	3.55	.56	3.45	.56	71
Personal/ professional life balance	3.54	.56	3.45	.58	71
Maturity	3.52	.61	3.55	.60	71
Tolerance	3.52	.56	3.45	.60	71

Table 33: Mean Ratings Of Personal Characteristics (cont.)

Personal Characteristics	Mean Importance	Standard Deviation	Mean Amount	Standard Deviation	Number of Ratings
Sense of humour	3.51	.61	3.41	.67	71
Assertiveness	3.46	.61	3.41	.60	71
A desire to learn	3.46	.58	3.31	.60	71
Open-mindedness	3.41	.60	3.27	.56	71
Perseverance	3.41	.60	3.34	.63	71
Creativity in problem solving	3.38	.59	3.28	.68	71
Stability in life	3.34	.61	3.37	.62	71
Foresight	3.23	.61	3.21	.61	71
Reliable intuition	3.14	.62	3.10	.66	71
Willingness to take risks	3.07	.72	2.86	.74	71
Cunningness	1.99	.85	1.87	.84	71
Aggressive-ness	1.96	.80	1.85	.77	71
Aloofness	1.56	.77	1.59	.87	71
All personal characteristics excluding the three negative traits	3.54		3.46		71
All personal characteristics	3.35		3.27		71

Given the range of mean ratings (3.89 to 1.59 on the level of importance scale and 3.86 to 1.59 on the amount required scale), it is unlikely that fatigue was a factor in respondents' ratings of the traits. If fatigue had been a factor the ratings of all the personal characteristics, including the three subtle negatives, would have been very similar. This, however, was not the case.

As expected, the three subtle negative traits had the lowest mean ratings. However, they had the greatest variability in responses as indicated by their high standard deviations. This indicates that although some respondents rated them as expected, others rated them higher than would have been thought.

To further explore the possible influence of social desirability on questionnaire responses, a series of t-tests was executed. Responses to the traits of aggressiveness, cunningness, and aloofness were grouped into two categories; low ratings, (none and minimal), and high ratings (moderate or critical/a great deal). T-tests were run using each of the subtle negative traits as independent variables, to assess whether significant differences in ratings of the other personal characteristics existed between those rating the negative traits higher than expected, and those rating them low.

An examination of the results of the t-tests indicated that respondents rating the level of importance of aloofness higher than expected also rated the level of importance of the traits patience and self-confidence significantly higher than respondents who rated this negative trait low (Table 34). One possible interpretation of this finding could be that some respondents may have perceived aloofness in a positive light believing that a certain amount of detachment from situations, and perhaps even other personnel, would be of some value. This detachment, combined with the characteristics of patience and self-confidence, may be seen as important "survival skills" in some situations. This interpretation could be seen as consistent with the relatively high ratings of traits associated with coping with stress. Although 2 of the 24 traits were statistically significant (8.3%), and this is a slightly greater number than one would expect due to chance alone, the possible affects of chance can not be ruled out.

There was no statistical significance between the ratings of the two groups on aggressiveness or cunningness and any other personal characteristic.

Table 34: Differences In The Level Of Importance Of Personal Characteristics Between Those Rating The Level Of Importance Of "Aloofness" High And Those Rating It Low

Trait	Mean High Raters (N=19)	Mean Low Raters (N=52)	2-Tail Significance
Patience	3.79 (.41)	3.48 (.60)	.015
Self confidence	3.72 (.45)	3.43 (.59)	.026

( ) Standard Deviation

T-test results indicated that those rating the amount of aggressiveness higher than expected rated the amount of stability in life significantly higher as well (Table 35). Given that only one trait (4.2%) was statistically significant, and a reasonable connection between aggressiveness and stability in life is difficult to make, a likely interpretation of this finding is that it is due to chance alone.

Table 35: Differences In Ratings Of The Amount Of Personal Characteristics Required Between Those Rating The Amount Of "Aggressiveness" Required High And Those Rating It Low

Trait	Mean High Raters (N=14)	Mean Low Raters (N=57)	2 - Tail Significance
Stability in life	3.64 (.50)	3.26 (.61)	.035

( ) Standard Deviation

Respondents rating amount of cunningness higher than expected also rated the amount of foresight, intuition, willingness to take risks, stability in life, and desire to learn higher (Table 36). Notable is the fact that although there was no statistical difference in the ratings of level of importance of these traits a statistical significance between ratings of amount of cunningness required and these traits does exist. One possible explanation is that cunningness was interpreted positively, perhaps as sly cleverness, by some respondents, and therefore rated higher by such respondents. This could be seen as consistent with the significantly different ratings of foresight, intuition, and a willingness to take risks. Stability in life is found here to be significantly different, as it was with amount of aggressiveness required. Given that five traits were generated as being statistically significant (20.8%), it is

unlikely that all of these findings are due to chance alone.

There were no statistically significant differences between those rating the amount of aloofness higher than expected and those rating it low on any of the other characteristics.

Table 36: Differences In Ratings Of The Amount Of Personal Characteristics Required Between Those Rating The Amount Of "Cunningness" Required High and Those Rating It Low

Trait	Mean High Raters (N=15)	Mean Low Raters (N=56)	2 - Tail Significance
Stability in life	3.73 (.46)	3.23 (.60)	.004
Intuition	3.53 (.52)	3.04 (.60)	.005
Foresight	3.53 (.52)	3.14 (.62)	.028
Desire to learn	3.73 (.46)	3.39 (.59)	.043
Willingness to take risks	3.40 (.74)	2.98 (.70)	.046

( ) Standard Deviation

These findings could be interpreted to suggest that social desirability may have had an influence on ratings of the amount of traits required. Given the few significant differences in ratings of the other personal characteristics



between those rating the negative traits high and those rating them as expected, the affect of these biases appears to have been minimal. An equally possible explanation of these differences could lie in respondents' interpretation of aggressiveness, cunningness, and aloofness. Some respondents may have perceived these traits in a positive light rather than the subtle negative intended. The possibility of lack of clarity is a limitation to the conclusions that can be drawn from this analysis.

## CHAPTER V

### **Conclusions And Implications**

The findings of this study fulfilled the basic purposes of the research: 1) to determine what knowledge, skills, abilities, and other personal characteristics are important to management of internal, broad-brush employee assistance programs, and 2) to identify the extent to which characteristics of the program itself, the organization in which it is found, and the individual EAP manager affect the importance and amount of traits necessary to manage this type of program. This research was a first step in beginning to understand these issues. Although no firm conclusions can be made on the basis of this one preliminary study, the findings do provide some basic insights to the topic.

The findings suggest that there is indeed a distinct set of traits important to EAP management. This set of traits relates to the importance of such job tasks as interacting with a wide variety of people both within and outside of the program and organization, conducting oneself in a professional manner at

all times, performing employee assistance specific tasks, program management, and coping with the stresses of the job.

The EAP manager's job differs from general management and other human service management jobs. This job exists in a cultural setting often quite different from that of the professional background of the EAP manager, with different values, goals, and perceptions of situations. The EAP manager interacts with a variety of stakeholders in the program, such as senior management, personnel of other departments within the organization, unions, and employees. The manager must often balance the competing interests of these groups and must work against being seen as aligned with any one group. She/he must perform tasks related to general management, human service program management, as well as employee assistance.

Since EAP management consists of many tasks also found in other disciplines, traits important to the job can be found in other types of management or other aspects of employee assistance as well. Individual traits unique only to employee assistance program management do not exist. It is the combination of traits, the set of knowledge, skills, abilities, and other characteristics, that is unique to employee assistance program management.

The findings of this study are consistent with much of the literature. Rudkin and Veal Jr. (1978), Stewart (1978), Lefton, Buzzotta, and Sherberg (1980), Alban Metcalfe (1982), Brown (1982), Grossman (1984), Austin (1985), Harold (1985), Middleman and Rhodes (1985), Hoffer (1989), and Tanner (1991) all emphasize, or at least speak to, the importance of many of these traits. However, such authors as Kilburg (1970), McCool and Brown (1977), Francek, Klarreich, and Moore (1984), and Ford and Ford (1986) place greater value on conceptional and theoretical knowledge than did participants in this study. Also, traits related to clinical skills were not given the same level of importance attributed to them by such authors as Birkland (1984), Dickman (1985), Masi and Maiden (1985), Quick, Sonnenstuhl, and Trice (1987), Nida, Foley, Maze, and Braucht (1987), McClellan and Miller (1988), and Gustavsson and Balgopal (1991). It must be noted, however, that many of the authors writings on the importance of traits found to be of lesser importance in this study, were not relating their importance directly to EAP management.

Ratings of traits on the two scales were often very similar, although based on the results of the Pearson's Product-Moment Correlation, the similarity in ratings was not sufficient to suggest respondents were not able to

differentiate between the two scales. The overall mean ratings of the level of importance of all categories of traits were slightly higher than the overall mean ratings of the amount of traits required. This suggests that generally respondents thought the level of importance of a trait was greater than the amount required.

Knowledge items related specifically to employee assistance were among the highest rated knowledge items. These included knowledge of employee assistance professional ethics and values, knowledge of the role of the EAP within the organization, knowledge of the relevant resources available in the external environment, knowledge of how to access relevant resources in the organization, knowledge of how to promote and market the EAP within the organization, and knowledge of workplace stressors. Respondents also identified these employee assistance specific knowledge items as being required to the greatest extent. This would suggest that these traits are highly important to the job of EAP management and should be given adequate attention in professional training programs and should be an area of careful scrutiny in selecting and hiring EAP managers.

Knowledge items considered of least importance tended to be of a

theoretical nature. These included knowledge of systems theory, adult education theory, organizational theories, and management theories. Although the mean ratings of these traits indicate that such knowledge items are of minimal value to the job, when analyzed for variance of ratings, significant differences in ratings were found for all but organizational theory. This would suggest that while knowledge of organizational theory is perceived as unimportant by most managers, regardless of characteristics of the managers themselves or the programs or organizations in which they work, this is not the case for the other theories. Ratings of all of these theories were affected on each of the scales by either respondent or program characteristics, with the majority of effects resulting from characteristics of the manager. This would suggest that a manager's training and background influences her/his perceptions of the theoretical knowledge important to the job.

Other knowledge items considered of least importance tended to be related to specific types of problems that may be presented to an EAP as requiring professional intervention. These include knowledge of industrial relations, group dynamics, the role of work in people's lives, life transitions, and occupational/professional groups in the organization including the issues they face. Although these knowledge items had the lowest mean ratings, they

had the highest variability in ratings indicating a wide range of perceptions about the importance of these traits. They tended to be most affected by characteristics of the program such as the number of EAP staff, the maturity of the program, and the percentage of time the manager spends performing EAP management duties. One might interpret this finding to indicate that such characteristics of the program impact the tasks performed by the manager. For example, those in larger, more developed programs may have the opportunity to involve themselves in a wider range of interventions and therefore would place greater value on the types of knowledge referred to here. On the other hand, managers not involved in these types of interventions would likely value this type of knowledge less.

The highest rated skills included interpersonal skills, skills in maintaining and utilizing confidential information, and active listening. The ratings of these skills are likely reflective of the critical importance of the EAP manager's interactions with others and the extent to which such interactions are a part of the job. The extremely high rating of these traits, coupled with the low variability of ratings, suggest that these skills are perceived by most EAP managers to be of high value to the job. Adding further support to their perceived value to the job is the fact that the levels of importance of all of

these skills were unaffected by characteristics of the manager, the program, or the organization in which the program exists. Given this universal importance, special attention should be given to ensure EAP managers have adequate training in these skills .

Also among the highest rated skills are those related to general management tasks. These include decision making, information gathering, planning, providing feedback, and managing stress. These skills tend to have very practical applications. The high rating of these skills adds further support to the premise that managers more highly value traits that are of practical value to the performance of their job. Since general management tasks tended to be most affected by characteristics of the organization, matching the amount of skill managers have in these areas to the organization's needs would be an important consideration in hiring.

The lowest rated skills tended to be related to human resource tasks (employee selection skills, job analysis skills, and supervisory skills), and specific types of clinical intervention (family counselling and couples counselling skills). In addition, budgeting skills and computer skills were perceived as being of minimal value. However, as with knowledge items,



these lowest rated skills had the greatest variability in ratings, indicating that there is a wide spectrum of opinion about their importance. It is possible that the variability could be explained on the basis of whether or not managers perform tasks related to the these traits.

The low mean rating of skills related to clinical intervention such as clinical skills in couples counselling and clinical skills in family counselling was surprising as such tasks tend to be the basis of employee assistance. The level of importance of these traits would no doubt be considerably higher in a study of traits related to general employee assistance practice.

The overall mean rating of abilities was higher than in any other category of traits. The small number of traits in this category could have influenced this finding, however, since the other category of largely inherent traits, personal characteristics, was rated second highest, this may be an important finding.

Abilities related to one's approach to people, situations, and life in general tended to be rated highest and have the least variability in ratings. These include sensitivity to and respect of differences in individuals and

groups, a neutral and objective perspective, the ability to conceptualize and think clearly, the ability to learn from experience, the ability to accept and respond to feedback, and the ability to integrate life, theory, and intuition. The high ratings of these abilities is consistent with the high ratings of other traits related to the EAP manager's approach to a variety of people in a multitude of situations. These traits tended to be affected by very few characteristics suggesting that they are perceived as important by the majority of managers, regardless of background, and are relevant to a wide spectrum of programs in a variety of organizations. This finding has implications for potential admissions screening for professional training of employee assistance program managers.

Cognitive abilities of focusing on detail as well as the larger picture and moving between the two as needed as well as predicting potential outcomes of situations were considered of lesser value than other abilities. However, according to this study's definition of "least important" (a mean rating of less than 3.0), these abilities could not be described as among the least important traits. Their lower ratings, nevertheless, are consistent with the lower ratings of other abstract traits such as theoretical knowledge.

Three groupings of personal characteristics were considered most important to EAP management: 1) characteristics related to professional values including honesty, credibility, a fair and consistent approach to people, a willingness to adhere to a set of professional ethics and values, an interest and commitment to the job, self-motivation and self-direction, and a professional presentation of self; 2) characteristics related to personal values including self-confidence, maturity, and insight into one's own values, strengths, weaknesses, and learning needs; and 3) characteristics related to coping with stress including flexibility, patience, an established balance between personal and professional life, tolerance for frustration and stress, and a sense of humour. This latter group of characteristics likely reflects the extent to which stress is a part of the EAP management job, while the former two potentially reflect the critical importance of the manager's professional image.

The importance of these valued personal characteristics tended to be most affected by program characteristics. Although one might have expected such traits to be universally valued and minimally affected by characteristics of managers, program, or organizations, as with abilities, this was not the case. This finding would suggest that particular personal characteristics have varying degrees of importance based on design characteristics of the EAP. Again, the

relevance of screening for the most valuable personal characteristics according to the individual design of program when hiring should be underscored.

The only personal characteristic that could be described as being of minimal importance was a willingness to take risks. It was speculated that the high variability in ratings of this trait might be explained by the managers' years of EAP experience, in that as her/his level of comfort in the job increased one would expect the manager's willingness to take risks to increase. This expectation was not found to be true. In fact, the high variability in ratings was not explained by any of the analysis of variance. It could be that EAP managers' willingness to take risks would be affected by their level of security and comfort in their current job. Information regarding the length of time in their present position, however, was not obtained so this supposition could not be explored.

In general, the traits considered to be most important to the management of internal, broad-brush employee assistance programs related to the managers' interactions with others. These traits include interpersonal skills, skills in maintaining and utilizing confidential information, honesty, credibility, a fair and consistent approach to people, a willingness to adhere to professional

values and ethics, the ability to be sensitive and respectful of differences in individuals and groups, knowledge of employee assistance professional ethics, and the ability to maintain a neutral and objective perspective. Not only did these traits receive the highest ratings, they tended to have the least variability.

These highly valued traits tended to be less affected by characteristics of the EAP managers, their programs, and the organizations in which their programs exist. While the level of importance of 68% of traits were affected by characteristics of the manager, program, and or organization, 55% of these 9 highly valued traits were affected. While the amount of trait required of 73% of the traits was affected by one or more of these characteristics, 55% of these highly valued traits were affected. Eighty eight percent of all traits were affected in some way, either level of importance or amount required, by these characteristics, while 78% of these highly important traits were affected.

Traits related to the EAP manager's professionalism are also viewed as highly important. Some of these traits, such as skills in maintaining and utilizing confidential information and knowledge of employee assistance professional ethics are learned and are therefore important considerations in professional training and development. Others of these highly rated traits, such

as honesty, credibility, a fair and consistent approach to people, a willingness to adhere to a set of professional values and ethics, sensitivity to and respect for differences in individuals and groups, neutrality, and objectivity are arguably traits that are inherent to the individual, although admittedly potentially enhanced by training. This finding emphasizes the importance of screening for these traits both in hiring and admission to professional training facilities.

Also considered to be of great importance to EAP management were skills related to interactions with others, such as interpersonal skills, oral communication, and active listening, as well as program management skills such as information gathering, planning, decision making, and implementation. Based on their high ratings, these traits might well be considered by those developing curriculums for professional employee assistance management training.

Knowledge items related to working within an organization were among traits considered most important. These items include knowledge of how to access relevant resources within the organization, knowledge of the role of the EAP within the organization including the underlying assumptions, beliefs, and

values, knowledge of workplace stressors, and knowledge of the formal decision making process of the organization including key personnel and their formal responsibilities. The significance of this finding is that this type of information can be easily incorporated by organizations into the orientation of new managers thereby potentially enhancing their early effectiveness on the job.

Traits related to coping with stress were seen as being both highly important to EAP management and being required in the greatest amounts. Patience, flexibility, self confidence, skills in managing stress, an established balance between personal and professional life, tolerance for frustration and stress, skills in setting boundaries and saying "no", and a sense of humour are all perceived as among the most important traits for EAP managers to possess. Although the importance of these skills varies according particularly to program characteristics, the high mean ratings and moderate standard deviations suggest that they are generally important traits to possess. This level of importance is no doubt reflective of the demands of employee assistance program management.

The fact that 20 of the 40 traits considered most important to employee

assistance program management, and 21 of the 40 traits considered to be required in the greatest amounts, are inherent to the individual emphasized the value of effective screening processes related to both hiring and admission to professional training programs and should be underscored.

Standard deviations of traits perceived as being of lesser importance tended to be higher than standard deviations of traits perceived as being of most importance. This indicates that the range of responses was generally greater for traits rated lower. One explanation could be that those respondents not performing the tasks requiring the identified trait rated the trait lower, while those performing the tasks saw the trait as being more important. Skills and knowledge related to such tasks as hiring, supervising staff, budgeting, and counselling may have lower mean ratings and higher standard deviations due to a difference in perception of importance by those who perform these tasks and those who don't. Further research to explore the level of importance attributed to traits related to specific tasks confirmed to be performed by respondents would be useful in understanding these ratings. If indeed there is a group of traits relevant to particular tasks performed by a segment of managers, these traits would be important to consider in hiring for particular jobs, and in providing professional development courses or seminars.



The range of mean ratings of both level of importance and amount of trait required was narrow. It is not surprising that traits were seen as being of some importance to the job and as being required to some extent as the list of traits was developed from extensive prior stages of research and were included in the listing because of having been identified as important to EAP management. A broader scale with a larger number of intervals is recommended for further research in attempt to differentiate to a greater extent the differences in level of importance and amounts required of traits.

The knowledge, skills, abilities, and other personal characteristics relevant to employee assistance program management appear to have varying degrees of importance based on the EAP's phase of development, whether the program consists of one or more than one staff position, and whether the majority of employees in the organization are unionized. The extent to which these traits are required appears to be affected by these program and organization characteristics as well as the size of the organization, and the gender ratio of employees. These findings could be of value in selecting a manager with traits most relevant to the specific characteristics of the program and organization. They could also be useful for curriculum developers in deciding what knowledge and skills should be taught to all students, and which

should be elective course content.

Characteristics of the manager produced the most significant variances in ratings. One possible explanation for this effect could be that respondents' perceptions of what is important are influenced by their own experience in terms of what they have been exposed to through formal education, what is considered important in their own professions, and what they have learned is important through years of job experience.

It was anticipated that characteristics of the manager, organization, and program would affect ratings of the traits. This was certainly true. Eighty four of the 96 traits (88%) were affected by at least one such characteristic: 20 of the 25 knowledge items (92%), 30 of the 39 skills (77%), 5 of the 8 abilities (63%), and 26 of the 27 personal characteristics (96%).

Findings of this study of the knowledge, skills, abilities, and personal characteristics important to the management of internal, broad-brush employee assistance, suggest that effective EAP management requires a combination of traits related to one's ability to interact with others, a reputable and professional presentation, various aspects of the field of employee assistance,

general management functions, program management functions, and interacting within the context of an organization. Variances in the levels of importance of these traits and the amount required should be considered in hiring and professional development of EAP managers. The overall importance of these traits should be considered in screening for admission to professional training programs, developing professional training curriculums, and hiring.

Further research might want to consider exploring the relationships between these traits and job performance. One would expect that if traits are indeed important to a job, they would influence job performance. Such a study would be an alternate approach to assessing the traits important to the job of employee assistance program management. Also of potential value would be to explore relationships between particular characteristics and clusters of traits.

Further research might also want to attempt to assess the effect of industry type on the level of importance and amount of traits required. Although this study attempted to do this, it was unsuccessful due to the small sample sizes in the various categories of industries. The questionnaire included a total of 12 industry categories, which in hind sight was clearly too many. Broader categories of industries such as not for profit and for profit, or private

sector and public sector, or some other meaningful categories would yield the sample sizes necessary to assess the effect of industry type on the ratings of the traits.

Future researchers may wish to address the issue of whether managers rated the traits related to the tasks they perform higher than those not performing particular tasks, such as was the speculation concerning ratings of traits related to such tasks as human resource management, budgeting, providing direct counselling services, and providing intervention services at the organizational level. Designing a questionnaire to ask respondents if they performed certain tasks and then have them rate the traits related to only the tasks they perform might be of value.

Caution must be used in interpreting findings based on the effects of level of education on ratings of traits due to the small sample sizes of two of the subpopulations. Sample sizes of less than 10 makes the findings questionable. In this case those with PhDs number 5 and those with high school educations numbered 7. Additional analysis could be carried out in the future using different groupings of education in order to form meaningful sample sizes.

The analysis carried out in this study was unsuccessful in differentiating between the effects of professional background and level of education. One possible way of gaining further insight into the effects of these variables would be to perform additional analysis to explore whether those with varying levels of education in the same professional background rated traits the same or different.

Future research may want to redesign the background information questions related to years of EAP management experience and years of operation of the EAP in which they currently work. As the questionnaire exists there is no way to determine if those with the most experience tend to work in programs that have been operating the longest. In addition to the questions of years of EAP management experience and years of program operation, a question related to how long the manager has been working in their current job should be included.

As there seems to be some real effects of unionization on EAP management, it would be interesting to determine the extent of differences according to different categories of percentages of unionization, including no

involvement of unions. This might well be considered in future research. In addition, perhaps the nature and role of the unions as they relate to employee assistance, such as providing support to members and resolving conflict, should also be explored in future research.

As a means of overcoming the difficulties posed by small samples in some categories, future researchers might want to expand the terms of reference of the study, including a wider variety of program models rather than limiting the focus to internal, broad-brush programs. With a larger sample, different types of analysis could be performed which would yield additional information; analysis that was beyond the scope of this study.

Also as a means of dealing with the sample limitations of this study future researchers would be advised to attempt to secure a sample of participants with diverse demographics in order to enhance the generalizability of findings and to attempt to secure an accurate list of the total population under study.

Findings of this research are preliminary and are based on some previously identified limitations of generalizability. Considerable further

research is required before sound conclusions and implications can be made. Learning from the limitations of this study, additional research may want to consider an alternate method of sampling, designing a questionnaire that would ask respondents to rate traits related to tasks they perform, and developing scales with a greater number of rating opportunities.

Sharon L. Ripley

Appendix 1

Winnipeg, Manitoba

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March 1, 1994

Dear M

I am writing to request your participation in a research study in the area of Employee Assistance Program management. This study is being undertaken as a Masters thesis in the Faculty of Social Work at the University of Manitoba under the direction of Professor Paul Newman. The objectives of the study are to identify the tasks performed by managers of internal, broad-brush EAPs and the knowledge, skills, abilities, and other characteristics important to the performance of these tasks. This study embarks on new territory as little research has been conducted in this area. Not only is it important to the general development of the field of Employee Assistance, it is specifically valuable to organizations seeking to establish EAPs, and to institutions and professional organizations concerned with the training and development of Program Managers. Your expertise as a Program Manager in the type of program under study places you in a unique position to assist in the breaking of this new ground.

Your involvement is requested in one or both of two steps of the study. The first step focuses on the identification of the tasks performed by Program Managers. The second step concentrates on the identification of the attributes necessary for the performance of these tasks.



The first step consists of one individual interview, likely to take approximately three hours of your time. The interview will be scheduled for a date, time and location of your convenience. You will be asked questions aimed at generating a thorough list of tasks performed in your position of Program Manager. In addition to task information, some specific information about the Program in which you work, and basic demographics about you as a respondent will be gathered in order to later describe the group of respondents and programs.

Information you provide will be collated with information gathered from approximately three to four other Program Managers in the city and a comprehensive list of managerial tasks will be compiled. Complete anonymity of individual responses is assured. At no time will the source of specific information be available to anyone other than the researcher. All information will be pooled to provide one thorough list of tasks. This is neither a program evaluation nor a comparative study. I will be happy to provide you with this comprehensive list for your use in developing job descriptions, compensation negotiation, and identification of skill development areas.

The second step involves participation in two half-day group sessions. These sessions will be scheduled at a time convenient to all participants and will be held at the University of Manitoba or another suitable location. The purpose of this step is to generate a comprehensive list of knowledge, skills, abilities, and other characteristics required to perform the previously identified managerial tasks. As in step one, participants will be managers of internal, broad-brush EAPs. If you choose to continue in the study, the list of tasks generated in step one will be provided to you prior to the second step of your involvement. Again, anonymity of individual responses is assured.

The list of attributes generated in the group sessions will be formulated into a questionnaire which will be sent to a random sample of relevant Program Managers throughout the country. These managers will be asked to rate the importance of each attribute using a six point scale. Information obtained from this survey will be analyzed to determine the level of importance attributed to each trait by the general sample.

population as well as subgroups of that population. A summary of the findings will be available to you for your personal and professional interest and development.

I will be telephoning you in the near future to address any questions or concerns you may have about the study, and hopefully to obtain your verbal consent for participation in either, or both, of the two phases. If you are interested in participating, an appointment for step one will be established at that time.

Since your involvement in this process is critical to the study, I thank you wholeheartedly for your consideration of involvement.

Looking forward to speaking with you,

Sharon L. Ripley  
Social Worker

FORMAT FOR TELEPHONE FOLLOW-UP TO THE  
LETTER OF INVITATION FOR PARTICIPATION IN THE STUDY

- 1) Introduction of caller
  
- 2) Statement of the purpose of the call: I'm calling as a follow-up to the letter recently sent to you about my research study on EAP Management.
  
- 3) Question: Do you have time to talk about this now?  
  
if yes: proceed to question 4.  
  
if no: establish a time to call back.
  
- 4) Question: Did you receive my letter about the study?  
  
if yes: proceed to question 5.  
  
if no: advise that another copy will be mailed and he/she will be telephoned again in approximately 1 week.

5) Question: Have you had a chance to read the letter?

if yes: proceed to question 6.

if no: establish a convenient time to call again to discuss the letter.

6) Question: Do you have any questions or concerns about the study?

if yes: provide answers to the questions and information about the concerns. When no further questions or concerns are expressed proceed to question 7.

if no: proceed to question 7

7) Question: Are you willing to participate in the initial step of the study?

if yes: establish a date, time, and location to meet. Remind the participant that the interview is likely to last approximately 3 hours.

if no: thank him/her for considering involvement in this step and ask if he/she is interested in being involved in a further step. If an interest is expressed follow up at that time.

8) Termination of the call with expressed appreciation.

**JOB ANALYSIS INTERVIEW FORMAT**

**Introductory Information**

Before we begin the questioning, I want to thank you for your participation in this part of the study. Little has been written about Employee Assistance Program management. You are participating in breaking new ground. My faculty advisor, Paul Newman, and I both believe that this study of the role and skill set of the in-house, broad-brush Employee Assistance Program Manager, will reveal information valuable to the development of the field of Employee Assistance. This information will be of particular value in the training and hiring of Program Managers. Plans are underway to share this information in journal articles. As a Manager of the type of program under study you are in a position to be a key player in establishing this new ground.

Today's interview will take approximately three hours. I will be asking two groups of questions. The first group relates to the EAP in which you work. The purpose of these questions is to gather some brief information about the organizational context of the Program, specific design components of the Program, and basic demographic information. This information will be used to describe the group of Managers participating in this portion of the study. A structured questionnaire requiring single word responses will be used for this portion of the questioning.

The second group of questions relates to the job tasks of the EAP Manager. The information will be used to develop a comprehensive list of job tasks and the knowledge, skills, abilities, and other characteristics important to the work of the Program Manager. A semi-structured

interview will be used to elicit information related to job tasks. We will begin by discussing generalities of the job and move to very specific task statements. For example, discussion of "clinical supervision" responsibilities may lead to a task statement such as "provide technical information and assist staff in defining and clarifying problem situations and/or developing intervention plans based on clinical principles". This process relies on your first hand knowledge of the tasks of an Employee Assistance Program Manager.

I want to assure you of the anonymity of your responses. This is NOT an examination of individual programs. Your responses to all questions will be pooled with responses of other Program Managers in order to understand the TASKS of EAP Manager and the qualities important to the POSITION.

You are under no obligation to complete the interview, or to answer all questions. You may choose not to answer any question as we go along and you may end the interview at any point if you wish.

Do you have any questions or concerns at this point? (Any requested information or clarification is provided.)

I have a Participant Consent Form that I would like you to read. Do you have any questions or concerns about the form? (Any questions or concerns are responded to.) Would you be willing to provide your written consent to participation in the study by signing the form? (If yes, signed consent is received and the interview continues using the following format. If no, the participant is thanked for his/her time, potential involvement in other aspects of the study are discussed, and the interview is terminated.)

**PARTICIPANT CONSENT FORM**

**Identification of Employee Assistance Program Management Tasks  
And The  
Critical Attributes in the Performance of These Tasks**

Having been informed of and understanding the purpose and process of this study, I, \_\_\_\_\_, agree to the following:  
That:

- 1) all responses to all phases of the study remain in the possession of the researcher, Sharon Ripley.
- 2) the identity of individual responses will not be revealed at any time.
- 3) no individual responses will be released. All information will be aggregated with other information before being reported.
- 4) participation in the study is completely voluntary.
- 5) participants can withdraw from the study at any time.
- 6) following completion of the study, results will be available on request.

\_\_\_\_\_  
Participant

\_\_\_\_\_  
Date

**Letter of Invitation to Participate in Phase 2 of the Study**

Sharon L. Ripley

Winnipeg, Manitoba

Dear \_\_\_\_\_:

I am writing to request your participation in a research study in the area of Employee Assistance Program management. This study is being undertaken as a Masters thesis in the Faculty of Social Work at the University of Manitoba under the direction of Professor Paul Newman. The objectives of the study are to identify the tasks performed by managers of internal, broad-brush EAPs and the knowledge, skills, abilities, and other characteristics important to the performance of these tasks. This study embarks on new territory as little research has been conducted in this area. Not only is it important to the general development of the field of Employee Assistance, it is specifically valuable to organizations seeking to establish EAPs, and to institutions and professional organizations concerned with the training and development of Program Managers. Your expertise as a Program Manager in the type of program under study places you in a unique position to assist in the breaking of this new ground.

Your involvement is requested in one or both of two steps of the study. The first step is concerned with the identification of the tasks performed by Program Managers,



and second step concentrates on the identification of the attributes necessary for the performance of these tasks. Step one asks for approximately three hours of your time and will take place at a time and location of your convenience. This step consists of individual interviews between the researcher and current job holders such as yourself. The purpose of the individual interview is to generate a list of tasks performed in your position of Program Manager. In addition to task information, some specific information about the Program in which you work, and basic demographics about you as a respondent will be gathered in order to later describe the group of respondents and programs. Information you provide will be collated with information gathered from approximately three to five other Program Managers in the city and a comprehensive list of managerial tasks will be compiled. Complete anonymity of individual responses is assured. At no time will the source of specific information be available to anyone other than the researcher. All information will be pooled to provide one thorough list of tasks. This is neither a program evaluation nor a comparative study. I will be happy to provide you with this comprehensive list for your use in developing job descriptions, compensation negotiation, and identification of skill development areas.

The second step involves participation in two half-day group sessions. These sessions will be scheduled at a time convenient to all participants and will be held at the University of Manitoba. The purpose of this step is to generate a comprehensive list of knowledge, skills, abilities, and other characteristics required to perform the previously identified managerial tasks. As in step one, participants will be managers of internal, broad-brush EAPs. If you choose to continue in the study, the list of tasks generated in step one will be provided to you prior to the second step of your involvement. Again, anonymity of individual responses is assured.

The list of attributes generated in the group sessions will be formulated into a questionnaire which will be sent to a random sample of relevant Program Managers throughout the country. These managers will be asked to rate the importance of each attribute using a six point scale. Information obtained from this survey will be analyzed to determine the level of importance attributed to each trait by the general sample population as well as subgroups of that population. A summary of the findings will be available to you for your personal and professional interest and development.

I will be telephoning you in the near future to address any questions or concerns you may have about the study, and hopefully to obtain your verbal consent for participation in either, or both, of the two phases. If you are interested in participating, an appointment for step one will be established at that time.

Since your involvement in this process is critical to the study, I thank you whole heartedly for your consideration of involvement.

Looking forward to speaking with you,

Sharon L. Ripley  
Social Worker

**Format For Telephone Call**  
**Re: Participation In Phase 2 Of The Study**

- 1) Introduction of caller.
  
- 2) Statement of purpose of the call: I'm calling to assure you received the results of the first phase of my study and to discuss the possibility of your involvement in the next phase.
  
- 3) Question: Did you receive the list of Program Manager tasks?

if yes: proceed to question 4

if no: advise that another copy will be mailed along with a letter requesting her/his involvement in the next stage of the study. Advise he/she will be called again in approximately one week to assure they received this copy and to discuss their further involvement.

- 4) Question: Is this a convenient time to discuss your involvement in the next stage of the study?

if yes: proceed to question 5

if no: establish a more convenient time to call back.

5) Question: Do you have any questions or concerns about the next step of the study?  
if yes: provide answers to questions and address concerns. When no further questions or concerns are addressed, proceed to question 6.

if no: proceed to question 6.

6) Question: Are you willing to participate in this step of the study?

if yes: establish some potential dates and times for the group session and advise that confirmation of details will be made as soon as possible.

if no: thank her/him for considering involvement in this step and reiterate appreciation for involvement in step 1.

7) Termination of call.

**A Study Of Human Traits**  
**Important To**  
**Employee Assistance Program Management**

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A Study Of Human Traits  
Important To  
Employee Assistance Program Management

The purpose of this study is to identify the knowledge, skills, abilities, and other human characteristics important to Employee Assistance Program management in internal, broad-brush programs.

**Your Expertise Is Requested In This Study If:**

- ▶ you are an EAP manager, meaning you have the formal authority to oversee the operation of your program. Your EAP management responsibilities may be a portion or all of your current job responsibilities.
- ▶ you are employed by the company/organization for whom you provide services. (i.e., yours is an internal EAP.)
- ▶ your EAP is currently a broad-brush program providing direct service to deal with a variety of employee needs, as opposed to having a single, substance abuse focus or providing solely a referral service.
- ▶ your program is in the implementation stage, rather than the developmental stage, meaning it is currently providing services to employees.
  
- ▶ If you are not the program manager, please pass this questionnaire on to the appropriate person.
- ▶ If your program does not fall within the above criteria of the study, please return the questionnaire uncompleted.
- ▶ If you have any questions please call Sharon Ripley at

**Please return the questionnaire by March 31, 1995.**

If you would like to receive a copy of the results of this survey, please return the attached card. Please do not return the card with the questionnaire; mail the card separately.

Thank you for taking the time to complete this questionnaire and assisting in the further development of the field of Employee Assistance!

**General Instructions:**

This survey consists of a list of traits that people may need in order to manage an internal, broad-brush Employee Assistance Program. Please rate each trait listed below using two scales. One scale rates the level of importance you believe this trait to have in the acceptable performance of the tasks of managing an EAP. The second scale rates the amount of this trait you believe is necessary to perform at an acceptable level of competence. The term "acceptable" refers to a level of job performance that is good, solid, competent, and adequate to carry out the job; more than barely acceptable, and less than outstanding or superior performance. Please check only one response per scale. When more than one response could apply, please check the one which best describes your thoughts.

For Example: If you believe it is of moderate importance that an EAP manager have an understanding of industrial relations, and that a minimal amount of this knowledge would be required to perform the job tasks, you would respond like this:

Level of Importance	Amount of Trait Required
None Minimal Moderate Critical	None Minimal Moderate A Great Deal
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

## I. Knowledge

The term "knowledge" refers to the awareness and understanding of specific technical information and facts. Please check a box on both scales, indicating how important each knowledge item is, and also how much of it is required.

	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
1. Knowledge of the formal decision making process of the organization in which the EAP exists. This includes knowledge of key personnel and their formal responsibilities.	□ □ □ □	□ □ □ □
2. Knowledge of the organization including history, philosophy, culture, rituals, goals, and values.	□ □ □ □	□ □ □ □
3. Knowledge of the labour unions within the organization including their role, history within the organization, and means of operating.	□ □ □ □	□ □ □ □
4. Knowledge of the role of the EAP within the organization, including the underlying assumptions, beliefs, and values.	□ □ □ □	□ □ □ □
5. Knowledge of workplace stressors.	□ □ □ □	□ □ □ □
6. Knowledge of the demographics of the workplace and the issues facing the different subgroups.	□ □ □ □	□ □ □ □
7. Knowledge of the occupational/professional groups within the workplace including knowledge of their individual cultures and values, and the issues they face.	□ □ □ □	□ □ □ □
8. Knowledge of how to access relevant resources in the organization such as occupational health staff, human resource staff, training programs, and employee benefits.	□ □ □ □	□ □ □ □
9. Knowledge of how to promote and market the Employee Assistance Program within the organization.	□ □ □ □	□ □ □ □
10 Knowledge of employee assistance professional ethics and values.	□ □ □ □	□ □ □ □
11 Knowledge of the role of work in people's lives.	□ □ □ □	□ □ □ □
12 Knowledge of organizational theory.	□ □ □ □	□ □ □ □
13 Knowledge of systems theory.	□ □ □ □	□ □ □ □
14 Knowledge of theories and styles of management.	□ □ □ □	□ □ □ □
15 Knowledge of human behaviour and motivation.	□ □ □ □	□ □ □ □
16 Knowledge of relevant clinical modalities.	□ □ □ □	□ □ □ □

	Level of Importance				Amount of Trait Required			
	None	Minimal	Moderate	Critical	None	Minimal	Moderate	A Great Deal
17 Knowledge of the fields of psychology and sociology in the topics of:								
a) crisis theory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) life transitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) family dynamics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) addictions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) group dynamics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) adult education theory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 Knowledge of industrial relations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 Knowledge of where and how to recruit EAP staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 Knowledge of the relevant resources available in the external environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## II. Skills

The term "skill" refers to a proficiency at doing a task acquired through training or experience. Please check the boxes corresponding to the level of importance of each skill and the amount of skill you believe is necessary to adequately manage an EAP.

	Level of Importance				Amount of Trait Required			
	None	Minimal	Moderate	Critical	None	Minimal	Moderate	A Great Deal
1. Interpersonal skills, particularly the ability to effectively interact with a wide variety of personalities using sensitivity, respect, empathy, diplomacy, and tact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Skills in recognizing people's strengths.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Skills in validating and re-enforcing people's use of their strengths.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Proficiency in providing constructive feedback, both positive and negative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Skills in communicating orally with a wide variety of audiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
6. Skills in communicating in written form using a variety of venues such as annual reports, company newsletters, brochures, and letters.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7. Nonverbal communication skills: consciously expressing feelings using facial expressions, gestures, and body language.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
8. Active listening skills.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
9. Skills in maintaining and utilizing confidential information.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
10. Information gathering skills including identifying what information is needed, as well as accessing this information.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
11. Assessment skills applied to individual and group needs.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
12. Assessment skills applied to workplace needs.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
13. Analytical skills: examining and evaluating information to identify process and content issues.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
14. Decision making skills: identifying options for problem resolution, and choosing the best available alternative(s).	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
15. Planning skills: developing goals, short and long term objectives, methods, and strategies.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
16. Implementation skills: putting into place and carrying out action plans.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
17. Evaluation skills: utilizing systemic means of evaluating the effectiveness and efficiency of program strategies and goals.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
18. Clinical skills in:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
a) crisis counselling	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
b) brief treatment	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
c) couples counselling	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
d) family counselling	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
19. Referral skills.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
20. Follow-up skills.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
21. Networking skills including seeking out, establishing, and utilizing connections.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
22 Teaching skills including explaining, demonstrating, and supervising practice. These skills may be applied to individual, small or large group education.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
23 Public relations skills: utilizing a positive and professional approach to achieve program goals and objectives.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
24 Consultation skills.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
25 Conflict management skills.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
26 Time management skills including planning and organizing tasks to accomplish prioritized goals and delegating tasks as required.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
27 Skills in managing stress.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
28 Skills in setting boundaries and saying "no" when appropriate.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
29 Leadership skills including empowering, influencing, and motivating others.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
30 Supervisory skills including determining and interpreting work procedures and assigning work duties.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
31 Skills in establishing and maintaining a climate conducive to quality work.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
32 Job Analysis Skills: the ability to clearly describe the needs of the department, the required job tasks, and the professional and personal characteristics required to perform the job and fit into the department.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
33 Employee selection skills: proficiency in developing mechanisms for gathering and rating information desired on job applicants.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
34 Skills in obtaining necessary financial resources.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
35 Budgeting skills: transforming goals and objectives into financial terms, monitoring expenditures, and taking corrective action as required.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
36 Computer skills applied to the analyzing and disseminating of information.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

### III. Abilities

The term "ability" refers to the innate or developed capacity to perform a task. Please check the boxes corresponding to the level of importance of each ability, and the amount of ability you believe is necessary to adequately perform the job.

	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
1. The ability to be sensitive to and respectful of differences in individuals and groups.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. The ability to conceptualize and think clearly.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3. The ability to predict potential outcomes of situations.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4. The ability to maintain a neutral and objective perspective.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5. The ability to focus on detail as well as to see the larger picture, and to move between the two as necessary.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6. The ability to learn from experience.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7. The ability to integrate life experience, theory, and intuition.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
8. The ability to accept and respond to both positive and negative feedback.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

#### IV. Other Characteristics

The term "other characteristics" refers to human qualities such as personality traits, attitudes, interests, motivation, and values. Please check the boxes corresponding to the degree of importance of each characteristic and the amount you believe is necessary to adequately manage an EAP.

	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
1. A willingness to adhere to a set of professional values and ethics.	□ □ □ □	□ □ □ □
2. A professional presentation of self.	□ □ □ □	□ □ □ □
3. A self directed and self motivated approach to work.	□ □ □ □	□ □ □ □
4. A genuine interest in and commitment to the job.	□ □ □ □	□ □ □ □
5. Insight into one's own personal values, strengths, weaknesses, and learning needs.	□ □ □ □	□ □ □ □
6. Aggressiveness.	□ □ □ □	□ □ □ □
7. A desire to learn.	□ □ □ □	□ □ □ □
8. Self confidence.	□ □ □ □	□ □ □ □
9. Assertiveness.	□ □ □ □	□ □ □ □
10. Patience.	□ □ □ □	□ □ □ □
11. Foresight.	□ □ □ □	□ □ □ □
12. A developed and reliable sense of intuition.	□ □ □ □	□ □ □ □
13. A sense of humour.	□ □ □ □	□ □ □ □
14. Cunningness.	□ □ □ □	□ □ □ □
15. Tolerance for frustration and stress.	□ □ □ □	□ □ □ □
16. Perseverance.	□ □ □ □	□ □ □ □

	Level of Importance	Amount of Trait Required
	None Minimal Moderate Critical	None Minimal Moderate A Great Deal
17 Flexibility.	□ □ □ □	□ □ □ □
18 Credibility.	□ □ □ □	□ □ □ □
19 Creativity in problem solving.	□ □ □ □	□ □ □ □
20 Aloofness.	□ □ □ □	□ □ □ □
21 An openness to new ideas and information.	□ □ □ □	□ □ □ □
22 Honesty.	□ □ □ □	□ □ □ □
23 A fair and consistent approach to people.	□ □ □ □	□ □ □ □
24 A willingness to take risks.	□ □ □ □	□ □ □ □
25 An established balance between personal and professional life.	□ □ □ □	□ □ □ □
26 Maturity.	□ □ □ □	□ □ □ □
27 Stability in life.	□ □ □ □	□ □ □ □

Please identify any other knowledge, skills, abilities or other characteristics you think are important in the management of an internal, broad-brush EAP.

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5. What proportion of employees are:  
 female? \_\_\_\_\_ male? \_\_\_\_\_
6. Approximately what percentage of employees belong to unions?  
 \_\_\_\_\_
7. How many staff positions does the Employee Assistance Program currently have?  
 \_\_\_\_\_ management \_\_\_\_\_ clinical \_\_\_\_\_ clerical
8. How many years has the Employee Assistance Program been operating?  
 \_\_\_\_\_
9. What percentage of your job is comprised of EAP management functions?  
 \_\_\_\_\_ under 50 % \_\_\_\_\_ 50% or more
10. To whom are you directly accountable?  
 \_\_\_\_\_ chief executive officer  
 \_\_\_\_\_ manager, human resources department  
 \_\_\_\_\_ manager, occupational health department  
 \_\_\_\_\_ joint management/union committee  
 \_\_\_\_\_ other (specify) \_\_\_\_\_
11. Are you female? \_\_\_\_\_ male? \_\_\_\_\_
12. What is your professional background?  
 \_\_\_\_\_ social work \_\_\_\_\_ nursing  
 \_\_\_\_\_ human resources \_\_\_\_\_ psychology  
 \_\_\_\_\_ medicine \_\_\_\_\_ business administration  
 \_\_\_\_\_ other (specify) \_\_\_\_\_
13. What is your current level of formal education?  
 \_\_\_\_\_
14. How long have you been working as a manager in the field of Employee Assistance?  
 \_\_\_\_\_

**Thank you very much for your time!**

**EAP Management Study, 14212 Parkside Dr. S.E., Calgary**

Appendix 8

February 28, 1995

1-

Dear 2--,

I am writing to request your participation in a research study on employee assistance program management. While there is a growing body of research in most aspects of the field of employee assistance, little attention has been focused on the area of program management. It is important to address this unmet need in order to identify the complexities and professionalism of the management function. Results of this questionnaire will provide important information for the training and professional development of EAP managers. By completing the enclosed questionnaire you will be making a critical contribution to the understanding of EAP management.

This is the last and most important stage of a study which, through a comprehensive literature review, in depth interviews and a focus group, has generated a comprehensive list of EAP management tasks and characteristics. This study is being undertaken as a Masters thesis in the Faculty of Social Work at the University of Manitoba. The construction of this study has been reviewed and approved by the Ethics Review Committee of the Faculty, with particular concern to protecting the anonymity of respondents. All questionnaires are anonymous, and all individual responses are confidential.

Your name has been provided to me, through your provincial or district EAP Association, as someone who fits the criteria of this study, a manager of an internal, broad-brush employee assistance program. Internal, broad-brush programs have been selected as the focus of this study as it is believed that their managers perform the widest spectrum of tasks, thereby facilitating the most thorough exploration of the topic of employee assistance program management. Your expertise and response are crucial to the success of this study and to the advancement of knowledge in this area. Whether EAP management functions are a portion, or all of you job responsibilities, your unique insights are important to this study.

Would you please take some of your valuable time to complete the attached questionnaire and return it in the enclosed envelope. I truly appreciate your contribution to the study and your prompt attention to the questionnaire. I look forward to receiving your response by March 17, 1995.

If you would like to receive a summary of findings of this study, which you may find useful in developing job descriptions, planning for your own professional development, and securing training funding, please print your name and address on the attached card. To ensure anonymity of your questionnaire response, mail the card separately.

If you have any questions please contact me at the above address or telephone me collect at  
Thank you for your involvement!

Sincerely,

Sharon L. Ripley  
MSW<sup>XXX</sup> Student

XXV



March 15, 1995

Dear

Recently I wrote to you requesting your involvement in a study of the human traits important to the management of internal, broad-brush employee assistance programs. As a manager of such a program, you are in a unique position to assist in the development of knowledge in this, as yet, relatively unexplored area. If you completed and returned the questionnaire, I thank you. You have made a real contribution to the field.

If you have not yet had an opportunity to complete the questionnaire, I urge you to take some time and do so. Since the number of programs of the type under study is limited, it is critical that all questionnaires be returned in order that meaningful conclusions can be made. Internal, broad-brush programs such as yours, were chosen as the focus of study on the basis of the belief that such programs require the greatest variety of management characteristics; this will allow us to do a thorough analysis. Your first hand knowledge and understanding of the EAP management function and the characteristics important to the performance of job duties is crucial to this study. In order for the study to be of optimum value, your response is necessary.

If you or your program do not meet the criteria of the study, as identified on the first page of the questionnaire, please return the questionnaire, uncompleted, in the envelope provided. This is important to the survey process in terms of measuring the sample size.

If you have begun the questionnaire, and do not anticipate having the opportunity to complete it, please return it anyway. Any amount of participation is important and appreciated.

In the event that you have misplaced the original questionnaire, or for some reason did not receive it, I have enclosed another copy.

If you would like a summary of findings of the study, please print your name and address on the enclosed postcard. To ensure the anonymity of your response, please mail the postcard separately from the questionnaire.

If you have any questions about the questionnaire, or the study in general, please do not hesitate to contact me at the above address or call me collect at

Once again, thank you for participation in this important study.

Yours truly,

xxvi

Sharon L. Ripley  
MSW Student

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