

A DESCRIPTIVE ANALYSIS OF EMPLOYEE PERSONAL
ASSISTANCE PROGRAMS OF SELECTED
OKLAHOMA BUSINESSES

By

STANLEY ROBERT MITCHELL
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Bachelor of Business Administration
University of Texas at Austin
Austin, Texas
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Master of Business Administration
University of Texas at Austin
Austin, Texas
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Thesis Approved:

Robert J. Galley

Thesis Adviser

Joe W. Fowler

Jimmy C. Kaeninger

L. W. Sibbald

Norman D. Henshan

Dean of the Graduate College

1064673

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CHAPTER I

THE DEFINITION OF THE PROBLEM

Introduction

In the decade of the 1970's people began demanding more of themselves, their employers, and their jobs than ever before. Businesses are faced with employees who are interested in the actualization of their own potential. The Yankelovich opinion polling organization discovered that employees for the first time are more interested in personal development and growth than in a new washer, a second car, or even a big promotion at work (65).

While firms are facing this type of pressure from their employees, inflation is making it difficult for the firms to satisfy both their stockholders and their employees. In order to overcome the problems caused by inflation and employees need for self-actualization, employers need to develop new methods and approaches that can be of mutual benefit to themselves and their employees. A partial solution to these problems might be for businesses to offer both employee personal assistance programs (EPAP), and consumer education programs for their employees.

Although EPAP may be broadly defined to encompass consumer education, this study will address the issue of consumer education programs separately. This study will separate the two areas by referring to consumer education as the training people receive while they are in

school (formal education) and employee assistance programs as the training people receive after they have finished their formal education and are employed in business. EPAP and consumer education programs could help both employees and businesses. The programs would aid employees by helping them become more efficient maximizers of their resources, both human and financial, and by providing them with the opportunity to become more self-fulfilled individuals. Businesses would also be benefited. They would have more satisfied employees. By alleviating employee personal and medical problems, the firm's productivity would increase since employees would be able to concentrate more fully at work. By teaching employees to become better utilizers of their financial resources, employees would demand less of their employer in the form of financial and fringe benefit remuneration.

Need for Consumer Education Programs

Since the 1930's, there has been an increasing awareness among consumer educators of the need for education directed at improving consumer efficiencies (30). A series of studies in the middle 1970's indicated that consumer educators have not been very successful at improving consumer efficiencies.

A study in 1975 for the General Mills Consumer Center found "that large numbers of Americans lack knowledge and skills in financial management and the ability to cope with economic change" (38, p. 16). Another study in 1975 by the United States Department of Health, Education, and Welfare found that "almost 30 percent of the adult population were incompetent in consumer economics, an additional 33 percent were

functional but not proficient in such basics as money management" (38, p. 16).

A survey conducted by the National Assessment of Education Progress shows that consumers were generally unable to use and apply basic math principles. More specifically:

1. 80 percent of the population between 25 and 36 years of age could not balance a checkbook.
2. 50 percent of the population between 25 and 36 years of age could not correctly select the most economical box of a product based on unit price information.
3. 50 percent of the population between 25 and 36 years of age could not fill out a simple income tax form correctly.
4. 80 percent of the population between 25 and 36 years of age could not correctly calculate a taxi fare (42, p. 8).

A Harris poll conducted in 1976 found that:

. . . 74 percent of the public believed students leaving high school were either not very well prepared or not prepared at all as consumers . . . in that same study 92 percent of the public supported compulsory consumer education (35, p. 1).

Educational programs have not met their obligation and responsibility to prepare students to become concerned for the ways they spend their money. The market place "demands intelligent, informed consumers in order that competition can be effective in maximizing the benefits of that economy" (63, p. 90). Students, however, are still involved in an educational environment that emphasizes production/producer courses.

Charles R. Hopkins observed that both secondary schools and colleges have spent

. . . hundreds of hours and thousands of dollars preparing young people to assume their economic roles as active producers in our society. Yet they have spent little time, and money, if any, to help those people be more effective and efficient in their economic roles as consumers (cited in 3, p. 27).

Even if the schools had been effective in producing intelligent, informed

consumers, there would still be a need for businesses to offer these types of programs to their employees.

The market place is not a stable environment. It is in a constant state of flux as new products are introduced and new marketing and financial institutions and practices are developed. Without continuing consumer education, the individual is soon left behind (63, p. 91).

Need for Employee Assistance Programs

Employees are not able to leave their personal problems at home while they are at work. An employee's personal problem effects his/her performance on the job. As an employee's performance decreases, so does the firm's productivity (53). By helping employees to rid themselves of personal problems, a firm benefits by having both happier and more satisfied employees while, at the same time, increasing productivity.

Businesses in the United States spend roughly \$300 billion on fringe benefits per year. The amount spent on fringe benefits, which is increasing almost twice as fast as the amount spent on employees' wages, is approximately one-third of the total payroll cost (18). By implementing certain types of employees' assistance programs, firms might be able to reduce the amount spent on fringe benefits while at the same time reduce other costs of employing people.

In 1976, statistics indicated that stress had passed the common cold as the most prevalent health problem in the United States (55). This statement is supported by the fact that industry lost between \$17 and \$25 billion each year in lost performance and health benefits payments due to stress disorders (39).

Employee assistance programs should be considered as an avenue for reducing stress related loss in the future. The average executive is functioning with 250 stress points. Psychologists regard a score of 300 stress points as the "breaking point" for the average person (46).

Business and industry spends over \$4 billion annually on training and development programs for employees (67). By providing some of this money for EPAP within the context of an organization's needs, it is possible for both employees and employers to benefit.

Statement of the Problem

The objective of this study is to determine the current status of EPAP offered by Oklahoma businesses. This study will seek to answer the following research questions:

1. How do employees working in the area of Training and Development perceive EPAP?
2. What EPAP are currently being offered by the firms represented by Oklahoma businesses?
3. How are EPAP being administered by Oklahoma businesses?

With employee interest in personal growth and development on the rise, it is important to know what type of training in the area has been offered in the past and what type of training in the area is being offered currently. Only when the status of training in the past is known and when the status of training currently being undertaken is known can recommendations for the future programs be made.

Although some form of EPAP has been around since the beginning of the century, it has only been recently that businesses have begun to take a real interest in the field.

Delimitations

The population for this study will consist of members of the Oklahoma Chapters of the American Society of Training and Development who are employed by businesses located in Oklahoma. Members employed in education, government, or as consultants were excluded from the population. The findings of this study are generalizable only to these companies although the findings may have implications for other businesses located in and out of Oklahoma.

Limitations

It is not intended that this study attempt to compare how training and development programs at these businesses compare to the training and development programs of other businesses. No attempt will be made to compare content of courses taught in businesses with those taught on the secondary school and college level.

Definition of Terms

To clarify the interpretation of data, the following terms are defined as used in this study:

Consumer Education: "The preparation of the individual in the skills, and understandings that are required for everyday living to achieve, within the framework of his own values, maximum satisfaction and utilization of his resources" (61, p. 14).

Employee Assistance Programs: A stress intervention program that, combined with other stress prevention procedures, can serve as an effective base for developing a comprehensive managerial system for combating organizational stress (39).

Employee Personal Assistance Program (EPAP): As developed for this study, it is an attempt to integrate both consumer education programs and employee assistance programs. Employee Personal Assistance Programs are those programs offered by businesses in an attempt to help employees lead happier, healthier, more satisfied lives while also helping them to become more productive employees.

Business: Any business/industrial enterprise engaged in profit making endeavors.

Secondary School: Schools that have students enrolled in grades 9-12, or 10-12.

College: All schools that offer college credit courses leading to a baccalaureate degree. This would include junior or community colleges, senior colleges, and universities.

CHAPTER II

REVIEW OF LITERATURE

Introduction

The focus for the review of literature is twofold, both consumer education and employee assistance programs were included in the search. The review of literature is, therefore, divided into two sections. The first section deals with consumer education. The second section deals with employee assistance programs.

Consumer Education

Teacher Education Competencies

High school teachers are generally unprepared to teach consumer education. Coleman (13, p. 32) stated that "almost universally collegiate business teachers education programs have not required courses in consumer education . . . to be a part of the undergraduate business education requirements." Coleman felt that "it is doubtful if any greater need exists than providing instruction which will produce individuals who will exercise intelligence in the marketplace and in planning the use of their personal resources" (p. 35).

English (19) conducted a survey of 273 consumer education teachers in Illinois that supported Coleman's position. Of the 273 consumer education teachers surveyed, over 54 percent indicated that they were

unprepared to teach consumer education. Only 29.4 percent of the teachers had any academic preparation in any area of consumer education, only 40.3 percent of them had any experience in the area of consumer education, and only 36.9 percent had any individual reading and/or study in any area of consumer education. Of the 273 teachers, only 77 had ever taken a course in the improvement of instruction in consumer education or basic business.

Garman (22, p. 53) expanded on English's study and conducted a "nation-wide assessment of the consumer education literacy of prospective consumer education teachers." The Test of Consumer Competencies was used to test knowledge of teachers. This is a standardized 55 item multiple choice test "designed to measure cognitive consumer knowledge in 14 areas of consumer education" (p. 55). Of the 4,309 prospective teachers who returned usable tests, the mean score was 32.67 with a standard deviation of 6.06. This converts to 59.4 percent correct score. Based on this test, it appears

. . . that prospective teachers do not possess a high level of cognitive understanding of consumer education subject matter. Although there was a significant difference at the .001 level between scores of prospective teachers who had taken one or more consumer education courses and those who had not, the prospective teacher with consumer education content could only average 34.14 correct answers, or a 62.1 percent correct score (p. 60).

To the extent that a consumer educator lacks understanding of all major areas, the effectiveness of the educational programs is reduced (63).

Student Consumer Education Competencies

In 1958, Jelley (30) conducted a study to determine the money management understanding of second-semester high school seniors. The test

was administered to 603 high school seniors regardless of academic background in Cincinnati, Ohio. "A 60-item multiple choice test and accompanying interview guide, constructed to measure their understanding, covered three major areas: borrowing money and using credit, managing personal finances, and insurance" (p. 15). The results of this study indicated that these high school seniors could have used more instruction in the areas of credit and insurance.

Meiselwitz's (40) 1967 study tested 592 high school students in Wisconsin. The test contained 162 objective-type questions covering banking, credit, installment buying, budgeting, saving, investing, housing, wills, taxation, insurance, social security, and consumer protection; and it was given to two groups of students. One group had taken courses relating to economics, consumer education, and general business while the other group had not taken courses in those areas. The results of this study were: (1) that there was a small difference in test scores between the two groups; (2) graduating seniors need a greater understanding in the areas of insurance, social security, and consumer protection; (3) seniors should have a greater knowledge of personal and family finance.

Larson (37) reached basically the same conclusion in the study of senior students in Minnesota during the academic year of 1967-68. Larson's study tested seniors enrolled in general business, seniors enrolled in consumer economics, and seniors enrolled in neither of these classes. The Beattie Consumer Information List was administered. Four areas of personal finance were covered: money management, credit, insurance, and savings and investment. Analysis of variance techniques were used to test for significant differences. There were no significant

differences among any of the groups in the area of money management. No significant differences existed between the students enrolled in consumer economics and the students enrolled in neither course in the areas of credit, insurance, and savings and investments. Both of these groups, however, scored significantly higher than the students enrolled in general business.

Bibb's (8) study re-enforced both of the other studies. Bibb's study dealt with a multiple-choice consumer information test administered to 1,058 university freshmen in the states of Indiana, Illinois, and Wisconsin. The results of this study found that:

There was no significant difference in the knowledge of budgeting, installment purchasing, and the comparison of prices possessed by university freshmen who received high school instruction in the three units and university freshmen who did not receive high school instruction in the three units but who completed one or more of the following high school courses: a one- or two-semester course in economics, a one-semester course in consumer economics, a one-semester course in business mathematics, a two-semester course in family living, or a one- or two-semester course in problems in a democracy (p. 217).

Hawkins' (24) study involved questioning Kansas high school students two years after graduation to determine if there would be a significant difference between the response given by students who had taken a course in consumer education and by students who had not taken a course in consumer education. The questionnaire contained 18 questions. It was designed so that the responses that were selected indicated the graduate's feelings or behavior.

The results, all but one question were found not to be significant, it was concluded that a consumer education course had little or no significant affect upon the responses given by the graduates two years after completing the course when compared with the response given by a similar group who had not taken the course. During the two years following high school graduation, those who did not enroll in a consumer

education course managed their money, used credit, borrowed money, and made purchases very much like those who had been given instructions in those areas (p. 222).

In 1970, 92 percent of the 194,000 bankruptcies were personal cases. "All in some way are directly or indirectly related to consumer and family financial relationships" (13, p. 33). Disagreements concerning family finance and household management were ranked either first or second as the topics married couples fought about most often (29). A study for the General Mills Consumer Center found that over one half of the families surveyed argued a great deal about money (38).

Troelstrup (62) reported that Mandell conducted a survey of American's knowledge of credit and found that personal characteristics do not have a bearing on knowledge about consumer credit. Most Americans do not have enough of an economic understanding of consumer credit to make intelligent decisions regarding its use. This study even showed that college graduates were no more knowledgeable than those who never attended college.

Cunningham and Cunningham (15) conducted a survey of consumer protection laws. The 10 areas of consumer protection laws investigated were false or deceptive advertising, false or deceptive retail advertising, credit regulation and reporting, door-to-door selling, automobile sales, credit cards, truth-in-lending, and deceptive retail practices. The 2,200 consumers were selected in late spring 1975 from a medium sized Texas city. The respondents were divided into six segments based on family income in an attempt to determine if knowledge of consumer protection laws differed according to family income level. The "f" test of the differences in means was used to determine if there were significant differences between the six income groups for each area of the law. The

findings of the study indicated a significant difference between the different income groups was found in the truth-in-lending area ($p < .02$).

Employee Assistance Programs

In the future, the effectiveness of business and its executives will not be judged by numbers and dollars alone, but will also be measured in human terms--the extent to which the enterprise contributes to society and the individuals associated with it (34, p. 1).

In a typical business, the dollar cost spent on human time and the employee's presence on the job accounts for roughly 70 percent of the total cost of operation. While this includes the direct cost of payroll and employee benefits, it does not include the business cost of employment, training, and other costs. Businesses can control all other expenses and still only achieve "limited results unless it concentrates on the largest, most flexible element of operating cost--human time" (34, p. 5).

This statement is supported by the fact that while approximately 70 percent of an operating budget is related to the employee cost, human productivity on the job approached only 30 percent of capacity (41). In May, 1976, American workers lost approximately 80 million hours a week due to health and personal reasons (25). These two figures re-enforce the idea that "those who control company activities should recognize that human concerns must be served" (34, p. 3).

Review of Studies in the Area of EPAP

Some form of employee assistance programs have been around at least since 1900. Eilbirt (16, p. 521) defined employee counseling as "any interpersonal interviewing initiated by management to help an employee

who faces a problem." As early as 1900, some businesses initiated employee assistance programs. These consisted of businesses utilizing special social or welfare secretaries who provided individual counseling of employees. Business medical personnel had also appeared by 1900. Their role as counselors developed after that time.

Between 1900 and 1920, the modern personnel administration emerged in business. During that time period, foremen began to receive training in the handling of employees. It took the wartime labor shortage, however, before the development of employment management received a strong commitment from business.

Psychiatrists became interested in industry during the 1920's as industrial mental hygiene made its appearance in industry. Businesses were also concerned with solving labor unrest at that time.

Accident proneness and the problem of older employees brought psychologists into the field of employee counseling in the 1930's. The development of nondirective and psychodramatic techniques expanded the role of psychologists in the area of employee counseling.

Personnel counseling as we know it today was developed in the Western Electric experiments. Wartime employee counseling was referred to as personnel counseling. During this time period, it was expanded to meet the need of the wartime workforce. After World War II, the services provided by personnel counselors diminished sharply.

Based on the half century review of employee counseling, Eilbirt (16, p. 521) stated that "measured quantitatively, the impact upon management of the development in employee counseling in the use of specialized personnel and methods seems slight." Eilbirt recommended that

management should get training in employee counseling and there should be more professionalization of employee counseling.

Zoll (69) conducted a study, the purpose of which was to add to the understanding of employee economic education programs conducted by business. The study concluded that efforts of business are being directed into two major areas: general economic education and company economic education. Two major problems arose in the selection of subject matter. Businesses experience problems in "(1) determining approach, depth, and breadth of treatment; and (2) selecting the specific economics facts to be taught" (p. 1607). This study also discussed the problems of raising the level of economic literacy among the general public and among businessmen.

Beyda (7) performed a similar study 11 years after Zoll. Beyda's study was entitled "Employee Economics Education Programs by Business Firms." In her study, she stated that "business has shown an interest in programs for increasing economic literacy particularly for employees" (p. 1573A). This study was concerned with "the emerging patterns and directions of employee economic education programs provided by business firms" (p. 1573A).

The information for Beyda's study was gathered from a random sample of firms listed in the 1962 Fortune directory. There were several major findings of this study:

1. Executives believe that school should be responsible for a share of the economic education. These executives want the schools to teach their students (and business's future employees) basic economic principles, the executives also would like their

future employees to understand the operations of the American economic system.

2. Business executives want economic education programs to improve the employees' understanding of the American economic system, improve the citizenship activities of their employees, and develop employee understanding of the firm's operations and procedures.
3. Businesses have demonstrated their belief in the importance of employee economic education through their administrative and operational practices.
4. The major problem encountered in past employee economic education involves the selection and preparation of content, determining the subject-matter focus, and the selection of participants.

The conclusions reached by Beyda's study were that interest in employee economic education programs has not increased to the extent indicated by the review of literature. The evolution of employee economic educational programs is a gradual process. Executives seem to believe that economic education is important; however, most of the firms surveyed do not provide it. At the time of this study, few employees were participating in the program, the objectives of the programs were broad, the range of topics was large, and the total number of hours devoted by businesses to economic education seemed too small to have much impact on the employees who chose to participate. The evaluation of the programs tended to be based on subjective opinions rather than systematic, objective evaluation.

The purpose of Baker's (6, p. 866A) study in 1970 was "to examine the role and effectiveness of company-sponsored educational programs for non-supervisory exempt personnel in research- and development-oriented companies." The population of his study consisted of approximately 1,000 employees from five research and development companies in the Baltimore-Washington areas.

The results of Baker's study indicated that employees viewed participation in company-sponsored educational programs as being related to job needs. "The study revealed that such programs are particularly effective in influencing the opportunity for personal growth and development and the desire to do interesting and challenging work" (p. 866A). His study reinforced the findings of other studies in that it found that encouragement of employees to participate in company-sponsored programs was equally effective whether it was given by a co-worker, direct supervisor, or another member from management. Baker's study also indicated possible growth in company-sponsored educational programs because 63 percent of the employees who had not participated in these educational programs had never received any encouragement to participate from any fellow employee, either co-worker or supervisor.

One of the purposes of Baker's study was to furnish information on the current status of training for non-management office personnel. Questionnaires were mailed to 721 firms in six states. Of these 721 firms, 434 responded and 122 of these firms provide their employees with classroom training. Another questionnaire was mailed to the 122 firms involved in classroom training. The purpose of this questionnaire was to collect information on the nature and purpose of in-service classroom

training programs. Information was supplied by 65 of the remaining firms.

The study by Baker revealed that in 72 percent of the 434 firms, the only training provided was job specifics, provided on the job, and it was given by the employee's supervisor. All of the 65 firms that responded to the second questionnaire had classroom orientation training, 88 percent had classroom office skill training, and 72 percent had classroom general education training. The general education training was providing the employee with opportunities for individual growth.

In 1978, Personnel Journal reported the research conducted by a bank in an attempt to diagnose its "people problems" as perceived by the bank's employees (20). A random sample of 263 employees were selected from the 2,000 employees that work in the main office comprised the population for this study.

Of the employees that responded, over 63 percent were in the 20 to 40 age range and over two-thirds of the respondents were females. Of the questionnaires mailed, 53 percent of the questionnaires were valid.

The results of this survey indicated the following:

1. If company sponsored counseling were available, roughly one-third of the employees would seek information.
2. Of the participants, 26.1 percent knew someone who had missed work because of a personal problem.
3. Marital and psychological problems were most often the reason for absence.
4. Twenty-seven percent knew someone who had been a hindrance to the bank's business. (Psychological, marital, or alcohol problems were most often the cause of the problem.)

5. A large proportion thought the bank should provide private employee assistance programs.
6. Approximately 75 percent of the employees felt health care programs should be implemented by the bank.

In the area of company policy regarding personal problems, roughly 54 percent believe that the bank had the right to fire an employee with an alcohol problem. The bank's right to terminate an employee whose work had suffered but who refused to get help was substantially supported by the respondents to the survey.

Over two-thirds of the employees in this study by a bank, did not feel free to talk to their supervisors. The majority of the respondents did not feel their supervisor should be made aware of their problem. Over half felt the bank's programs should be held inside the bank. Nearly one-half felt the bank should pay for the program, while over one-third felt the cost of the program should be split between the bank and the employees.

Review of Articles in the Area of EPAP

Employee assistance programs have become an employee benefit in many companies. These programs are designed to provide counsel for employees in order to help them through the spectrum of life's problems. Employee assistance programs have evolved to the point today where most firms attempt to handle virtually all personal problems. Employee assistance programs seem to be gaining acceptance.

In the Wall Street Journal, Ricklefs (53) reported recently on employee assistance programs. Metropolitan Life Insurance Company started offering employee counseling in the form of a "housemother"

over 60 years ago. Today their employee assistance programs help roughly 1,500 employees. Currently, a major emphasis of Metropolitan's employee assistance program deals with retirement planning. International Telephone and Telegraph Corporation reported that approximately 2,000 employees have participated in its seven-year-old employee assistance program. In International Paper Company, executives, managers, and professionals account for one-third of the participants in its employee assistance programs. J. C. Penney Company started its employee assistance program in 1977. Donald V. Sievert, chairman of the company, stated that from a productivity viewpoint, there is an economic advantage to the firm that offers employee assistance programs.

Employees seek assistance in many areas. The major areas in which employee assistance programs are helping are as follows:

1. providing financial advice,
2. providing medical advice,
3. helping employees deal with stress,
4. helping employees deal with family problems, and
5. the largest area, providing help in the area of alcoholism.

The confidentiality of employee assistance programs is a major concern. The potential for management abuse of employee assistance programs is immense. The programs will not work without the belief on the part of the employee that the information he/she provides is going to be held in strict confidence by the counselors in charge of the programs. The American Civil Liberties Union is not presently aware of any situations where businesses have gained information through employee assistance programs and use that information against the employee (53).

Wellness training is another subset of employee assistance programs. "Wellness is a way of thinking, a way of eating, a way of exercising, a way of living" (14, p. 30). Wellness training involves behavior modification of the employee. It is concerned with getting workers to exercise, reduce their weight, stop smoking, improve their nutrition, and learn to recognize and overcome enervating factors that effect an employee's mind, body, and spirit. Wellness training has the same purpose as other EPAP: to reduce employee illness cost and to increase productivity.

One study dealing with the implementation of wellness training produced favorable results. The study isolated seven behaviors that had a significant influence on the life expectancy of 7,000 Alameda County, California adults (56). These factors were analyzed over a five and one-half years period. Some of the results of the study were:

1. A 45-year-old man who followed between six and seven of these factors would expect a life expectancy of 78 years or 11 years longer than a 45-year-old man who followed no more than three of the behavior changes.
2. The study also found that people "who practiced all seven of the habits were in about the same shape as people 30 years younger who followed a few or none of them" (p. 25).

The Air Force has initiated personal financial management programs. Weldon L. Jackson (31), Chief of the Education Service Branch Personnel Division at Tinker Air Force Base in Oklahoma City, reported that several studies had demonstrated the need for personal financial management competency among Air Force personnel. A general lack of personal money management skills has caused a large number of airmen to be in serious

enough personal financial difficulties to threaten their jobs in the Air Force. The emotional and psychological stress caused by financial difficulties adversely affect's the airman's production level at work. The inability to manage family finances successfully is also contributing to family breakup and/or divorce. In order to help alleviate the problem Tinker Air Force Base has initiated a comprehensive personal financial management program.

Kansas State University, in connection with Fort Riley Army Base, is offering financial counseling to military personnel and their dependents. This program began in 1970 when the Army Community Services at Fort Riley approached the Kansas State Department of Family Economics seeking assistance in its offering of financial counseling (52).

Businesses are also concerned about the personal problems of their employees and those of his/her immediate family. While employee assistance programs may differ between companies, they tend to have five characteristics:

1. The programs are designed to serve the non-alcoholic employee as well as the alcoholic employee.
2. The programs are designed to provide help for the employee and his/her entire family.
3. The business and the employee's supervisor are excluded from direct involvement in providing assistance to the employee.
4. The programs are designed to provide preventative assistance.
5. The programs are designed so the confidentiality of the employee and the problem are maintained (12).

In order of frequency, employee assistance programs deal with the following types of employee problems: the employee's family problem,

the employee's financial problems, the employee's legal matters, and the employee's drug problem. An employee assistance program counselor at one company stated that by having someone for the employee to turn to can mean the difference between life or death of an employee (12). This statement was made on the basis of suicide rates of employees and dependents, since the integration of the company's employee assistance programs.

Specific Employee Assistance Programs

The alcoholic employee has been one of businesses' biggest personnel concerns for a long time. The cost of alcohol misuse and alcoholism is estimated to cost business \$9.35 billion in lost production and \$8.29 billion in medical and health cost (20). Over four times the number of businesses operate alcoholism programs today as were offered in 1973 (53).

In 1972, then Secretary of HEW, Casper Weiberger, stated that alcoholism is the United States' number one drug problem (67). It has been estimated that alcoholism is quite prevalent among the employed. Between five percent and 10 percent of the work force is affected by alcoholism in some form. Business executives, professional people, and business managers account for 45 percent of the alcoholics in the United States.

Businesses that offer an alcoholics assistance program have experienced recovery rates of employees of 60 to 80 percent. The recovery rates for job related programs are substantially higher than the recovery rates for non-job related programs (53). Businesses need to make a firm commitment to the continuation of these programs because stress from all

sources has been found to significantly relate to the development of alcoholism and the continuation of alcoholism (47).

Although stress can be directly related to alcoholism, it can also be directly related to other areas that affect employee's health and performance. Stress disorders cost business between \$17 billion and \$25 billion each year in absenteeism, lost performance, and health benefit payments (39).

Women traditionally have had fewer stress related physical problems than men. This is changing, however, as more women become executives. Women executives have health profiles more like their male executive counterpart (59). The potential for stress related problems is staggering. Dr. James J. Gallagher, chairman of Career Management Associates, New York City, stated that the typical executive is five-sixths of the way toward a nervous breakdown (46). Dr. Gallagher based this statement on a table of 43 personal and business life events. Stress rating points are assigned to each event (for example, divorce = 73 points). As mentioned earlier, psychologists consider a score of 300 stress points by an individual as being the "breaking point." The average executive is functioning with 250 stress points.

Stress related illnesses are not, unfortunately, common only to business executives. In a study of 270,000 employees of a large American business, "the incidence rate of first disabling coronary heart disease was two and a half times greater among skilled manual workers than among the executive grades. Furthermore, the rate increases inversely with occupational grade" (21, p. 31).

A similar relationship was noticed in a study by Hinkle (23). His study dealt with 260,000 career employees of the Bell System. The

results of his study found that blue-collar workers and foremen experienced a significantly higher rate of disabling heart attacks and of death resulting from coronary problems than did management level employees.

Job pressure is not the only producer of stress. Conflicts with spouses, children and personal finances can produce stress for the employee that can impair health, productivity, and performance on the job (39). Stress has become a serious enough problem that it "is now recognized as a condition common to people who work in today's organization" (57, p. 26). Stress management assistance programs appear to be here to stay. "The question for employees is how to best manage it. And for the trainer, how to best teach those management skills" (57, p. 26).

Businesses are also beginning to become aware of the physical, mental, and economic benefits of employee exercise programs. Employees who participate in physical fitness programs, contend that one of the largest benefits they receive from physical training "is that it helps them manage stress more effectively" (14, p. 31).

Dr. Richard Kerlor, director of program development for the President's Council on Physical Fitness and Sports, stated that employee absenteeism and/or sick leave is the major personnel problem for business (49). All of business office workers' health problems could be greatly alleviated by regular exercise.

Businesses have been able to reduce employee expense, employee boredom, and employee absenteeism; at the same time they have been able to increase employee loyalty and employee morale by sponsoring medically approved cardiovascular fitness programs. The trend in physical fitness programs presently is "toward highly disciplined and organized programs

with carefully calculated objectives" (70, p. 40). By making physical fitness part of the employee's job, the employee is then covered by Workman's Compensation and/or the business liability insurance (14).

Although business sponsored cardiovascular fitness programs are less than 10 years old, they are already established in some United States firms. The results of some of the programs are very promising. A Goodyear Tire and Rubber Company reduced employee absenteeism by roughly 50 percent among employees who participated in its fitness program. Research released by Exxon and Mobile indicated a reduction in coronary risk factor by participants in their fitness programs. Studies done in the Soviet Union have also reported increased employee productivity and a reduction in employee absenteeism as a result of physical exercise (70).

There is also substantial research and other documented evidence supporting physiological results of improved physical fitness among employees. Other benefits accrue from employee fitness programs are improved self-image, loss of weight, increased energy, and increased productivity (52).

It has also been widely recognized that an employee with personal/family financial problems is not likely to operate at full performance on the job (1). Traditionally, financial planning formerly was a benefit offered only to top management. Recently, it has begun to be offered to all employees (58). Dillingham Corporation philosophy is that when they hire an employee, that person is only 50 percent of the team. They encourage both employee and spouse to attend the financial planning seminars the company offers (28).

Dillingham and other companies are providing this type of benefit to their employees in part because they believe that employees at all levels of employment need and want independent personal financial help. There is a need for independent help because in a survey by the Association of Financial Planners, approximately two-thirds of the income a financial planner receives is commission from the products he/she sells rather than from a fee for personal financial planning (26). Also, personal financial counseling is becoming so popular that

. . . just about everyone at all involved with financial services is getting into the act, or thinking seriously about it: securities firms, banks, insurance companies, and independent financial counseling firms and individuals (28, p. 1).

Within the next 10 years, revenues generated by personal financial counseling will be approaching the billion dollar level (28).

Personal financial planning programs provide benefits to both the employer and the employee. The benefits to the employer are:

1. Communicates fringe benefits in a way the employee can understand them (e.g., understanding of costs and where they fit into his/her overall financial situation).
2. Promotes a better understanding of how a business is operated (e.g., balance sheet, income statement, forecasting, planning, and budgeting).
3. Develops interest in a well-managed operation and how to measure it.
4. Teaches management by objectives; personal goal setting.
5. Reduces total time on the job wasted by personal money matters.
6. Creates interest in staying current on economics.
7. Creates interest in government actions--taxes, etc.
8. Creates better citizens for the community.
9. Provides excellent public relations for the company by helping employees become money managers.

10. Provides a very low cost fringe benefits, that helps coordinate other fringe benefits.
11. Creates loyalty of employees and spouses (32, p. 42).

The benefits to the employees are:

1. Opens up communications between spouses on the issue of money.
2. Helps to eliminate conflicts (e.g., divorce, despondency--caused by money).
3. Keeps employees current on personal/financial information relevant to their lives.
4. Promotes an appreciation of the basic functions (budgets, financial statements, goals) performed by the company.
5. Motivates employees to plan and set goals.
6. Opens up new thinking as to the purpose of money.
7. Develops money managers out of money spenders.
8. Helps employees save money.
9. Alerts employees to economic and investment risks.
10. Helps employees get more out of life.
11. Provides peace of mind (32, p. 43).

The Bailard, Biehl and Kaiser financial planning program, a financial planning program that is being used and copied by businesses all over the United States:

. . . is aimed at providing corporate employees--at any salary level--with skills necessary to make better personal financial decisions. The result is an economically literate employee who is able to get more out of life than previously, who has attained peace of mind that being able to skillfully interrelate all one's financial decisions can provide and who, often for the first time, understands the benefits and values of his/her corporate fringe benefit program (32, p. 43).

Summary

The literature reviewed for this study revealed a lack of consumer

education competencies being taught by the formal educational systems in our country. It also gave insight into the types of employee assistance programs that are being offered by some businesses. More importantly, the literature demonstrated a need for businesses to offer their employees more comprehensive employee assistance programs in the future.

CHAPTER III

METHODOLOGY

Introduction

The types of employee personal assistance programs offered by selected business firms in Oklahoma were analyzed through the use of descriptive research. Descriptive research is used to gather information to help determine the present status of existing conditions (17).

The following steps were followed to complete this study:

1. Selection of a problem.
2. Review of related literature.
3. Selection of the population.
4. Development of the instrument.
5. Collection of the data.
6. Analysis of the results.

The selection of the problem and the significance of the problem were covered in Chapter I. The review of the related literature was presented in Chapter II. The remaining steps in the study are explained in subsequent paragraphs in this chapter.

Selection of the Population

Members of the Oklahoma City and Tulsa chapters of the American Society of Training and Development were selected as the population for

this study. Since the focus of the research was on the current status of employee personal assistance programs in Oklahoma, it was felt that members of ASTD would be knowledgeable in the type of training programs offered at their firm and interested in participating in a study of this type.

Securing the mailing lists of the members of both the Oklahoma City and Tulsa chapters was the first step in the selection of the participants for this study. The members were then grouped according to employer. Only members working for Oklahoma firms were included. Members who were employed in education, government, and as consultants were removed from the population. This was done because the focus of the study dealt with programs offered by Oklahoma businesses.

Of the remaining group, one participant was selected from each of the remaining employers. In cases where more than one ASTD member was employed by the same business, the member who was thought to be most qualified to provide the required data was selected to participate.

In some cases, particularly when selecting participants from the Oklahoma City chapter, it was difficult to determine from the mailing list who was the most qualified to respond to the questionnaire. When this situation arose, one member from a particular business was selected at random to participate.

Development of the Instrument

The development of the questionnaire involved the following process: First, the literature was reviewed in an attempt to discover what type of research was needed. At the completion of this step, a list of

research questions was conducted. The third step involved studying several books on questionnaires and questionnaire design.

While reviewing the literature, a study was found which closely parallels this study. The purpose of the study reported in the Personnel Journal was to survey employees of a bank to elicit their opinions on the need for employee assistance with personal problems on how assistance programs should be developed and on their perceptions about their jobs (20). The questionnaire for that study was used as the model for the questionnaire used for this study.

The list of questions completed from reviewing the literature was then molded into proper form and included in the questionnaire.

The completed questionnaire was then given to faculty members at Oklahoma State University who comprised the committee for this dissertation and faculty members at Oklahoma State University who taught in the area of training and development. This was done in an attempt to alleviate problems associated with questionnaire design. The suggestions for improvement of the questionnaire were included in the final copy. A copy of the questionnaire that was used in the research is included in Appendix A. A copy of the questionnaire that was used as a model for the questionnaire used in this study is included in Appendix B.

Collection of the Data

On November 26, 1979, the questionnaire along with a cover letter and a brochure describing the Training and Development for Business--Master of Science Program offered through the Department of Administrative Services and Business Education at Oklahoma State University--was sent to the participants in the study. The participants were given

until December 14, 1979, to complete and return the questionnaire. On December 18, 1979, a second letter and questionnaire were sent to those who had not responded to the first one.

Analysis of the Results

The purpose of this study was to discover the current status of EPAP of selected Oklahoma businesses. The analysis of the results had several focuses.

One of the main focuses of the study was to try and determine what the opinions of the participants in the study were with respect to EPAP.

A comparison was made among the participants based on their answers to question number six: Does your firm presently offer any of the programs listed in the column heading at the right? The group answering "yes" to this question was compared with the group answering "no" with respect to their personal opinion concerning:

1. A company's responsibility to provide EPAP.
2. Whether or not EPAP falls within the domain of a company's training and development program.
3. Whether or not EPAP courses should be included in a college level training and development curriculum.

A second comparison was made concerning the above listed opinions but the participants were divided according to the size of the business where they were employed. Participants from businesses with less than 500 employees were compared with participants from businesses with more than 500 employees.

The responses to questions 2, 3, and 25 were given the following numerical rate: no = 0, undecided = 1, and yes = 2. As a result of

assigning numerical values, a "t" test was performed in order "to determine whether the mean performance of the two groups was significantly different" (50, p. 129). The formula used in the computation of the "t" test is as shown below:

$$t = \frac{\bar{X}_1 - \bar{X}_2}{\sqrt{\left(\frac{\sum X_1^2 - \frac{(\sum X_1)^2}{N_1} + \sum X_2^2 - \frac{(\sum X_2)^2}{N_2}}{(N_1 + N_2) - 2} \right) \left(\frac{1}{N_1} + \frac{1}{N_2} \right)}}$$

where

\bar{X}_1 = the mean of the first group of scores

\bar{X}_2 = the mean of the second group of scores

$\sum X_1^2$ = the sum of the squared score value of the first group

$\sum X_2^2$ = the sum of the squared score value of the second group

$(\sum X_1)^2$ = the squared of the sum of the scores of the first group

$(\sum X_2)^2$ = the squared of the sum of the scores of the second group

N_1 = the number of scores of the first group

N_2 = the number of scores of the second group (11).

The analysis of the results also focused on other areas. The percentage of firms offering any type of EPAP were considered important. This information would show generally how widespread the practice of offering EPAP is.

The analysis of the results will breakdown the type of specific EPAP offered by businesses. By showing which specific EPAP are currently being offered, it will be possible to discover which specific programs business considers to be the most and least important.

A major section of Chapter IV will deal with the actual methods used by businesses in their administering EPAP. By focusing on this area,

recommendations can be made concerning possible changes that need to be made in the future.

Limitations

It is not intended that this study attempt to compare how EPAP at these businesses compare to EPAP at other businesses. No attempt was made to compare the content of courses taught in businesses with those taught on the secondary or college level.

CHAPTER IV

PRESENTATION OF DATA

Introduction

The purpose of this chapter is twofold. The first purpose is to determine the participants' opinions concerning EPAP role in business and the need for the college curriculum in the training and development area to include courses in EPAP. The second purpose is to describe the current status of EPAP in businesses located in Oklahoma.

It needs to be noted that all participants did not elect to respond to all the questions in the questionnaire. For this reason, there are some discrepancies in the number of replies within the questionnaire. Where it was determined that an analysis of the data would clarify or provide insight into the participants' answers, a "t" test was used to determine if a statistical difference existed.

Questionnaire Return Data

On November 26, 1979, 153 questionnaires were sent. Included with the questionnaire was a cover letter, a self-addressed stamped envelope, and a brochure describing the Masters Degree Training and Development option offered by the Department of Administrative Services and Business Education at Oklahoma State University. A copy of the letter and a copy of the brochure are included in Appendixes C and D. Seven questionnaires

were returned as not deliverable. The total sample, therefore, consisted of 146 participants. The participants were given until December 14, 1979, to complete and return the questionnaire. By December 14, 1979, 66 questionnaires had been returned. On December 18, 1979, a second questionnaire, cover letter, and self-addressed stamped envelope were sent to the 80 people who had not responded to the first questionnaire. A copy of the second letter is included in Appendix E. Thirty-one questionnaires were returned as a result of the second mailing. Ninety-seven of the 146, or 66.43 percent of the persons surveyed in the study responded.

Nine of the participants who returned their questionnaire stated that they did not feel that they should participate in the study. This left 88 completed questionnaires. Six questionnaires that were completed were determined to be un-usable. The results of this study are, therefore, based on the 82 usable questionnaires.

Of the 82 businesses represented in the study, 44 (53.66 percent) of the businesses do not currently offer any type of EPAP. Thirty-eight (46.43 percent) of the businesses offer at least some EPAP.

Three of the participants failed to indicate the number of full-time employees their business employed. Of the 79 businesses represented in the study that included the number of full-time employees, 39 businesses employed 500 or more, while 40 businesses employed fewer than 500 full-time employees. Of the businesses that employ 500 or more full-time employees, 64.1 percent offer some EPAP, while only 27.5 percent of the businesses employing less than 500 full-time employees offer EPAP. Table I presents a summary of these statistics.

TABLE I

COMPARISON OF EPAP OFFERED BY OKLAHOMA BUSINESSES

	<u>All Businesses</u>		<u>Business with 500 or More Full-Time Employees</u>		<u>Business with Less than 500 Full-Time Employees</u>	
	<u>Number</u>	<u>Percentage</u>	<u>Number*</u>	<u>Percentage</u>	<u>Number*</u>	<u>Percentage</u>
Currently Offering EPAP	38	53.65	25	64.10	11	27.50
Currently Not Offering EPAP	44	46.34	14	35.90	29	72.58

*Because three participants did not indicate the number of full-time persons employed by their businesses, the numbers added do not equal the numbers shown for all businesses.

Participants' Opinions Concerning EPAP

The analysis of the opinions discussed in the first section of this chapter are presented in Table II and Table III.

Table II presents a comparison of the opinions of participants who are employed by businesses that are currently offering EPAP and the opinions of participants who are employed by businesses not currently offering EPAP. A "yes" response was given a numerical coefficient of 2; a "no" response was given the numerical coefficient of 0; and an "undecided" response was given the numerical coefficient of 1. A mean score of greater than one on any question would indicate that the group as a whole had a positive response to the question. A mean score of less than one on any question would indicate that the group as a whole had a negative response to the question.

A "t" test was performed between those participants who were working for a business offering EPAP and those participants working for a business not offering EPAP. There was a significant difference at the .05 level between the groups when asked if they believed a company had the responsibility to provide EPAP. Although both groups had a mean score of greater than one, the participants who were employed by a business currently offering EPAP were much stronger in their belief that a company does have the responsibility to their employees to offer EPAP.

Both groups believe that EPAP falls within the domain of the Training and Development programs of businesses. There was no significant difference between the groups with respect to this question. It is interesting to note that the group with the higher mean score for this question was the group whose business was not currently offering EPAP.

TABLE II

COMPARISON OF THE OPINIONS OF PARTICIPANTS WHO ARE EMPLOYED IN A BUSINESS
 THAT IS CURRENTLY OFFERING EPAP AND THE OPINIONS OF PARTICIPANTS
 WHO ARE EMPLOYED BY A BUSINESS NOT CURRENTLY OFFERING EPAP

	Currently Are Offering EPAP		Currently Are Not Offering EPAP		t	P
	M	σ	M	σ		
Do you believe a company has the responsibility to provide EPAP?	1.50	.796	1.068	.899	2.31	S*
Do you believe EPAP are important enough that one or more courses in a college Training and Development Curriculum should be offered?	1.657	.62	1.41	.74	1.578	NS
Do you believe EPAP fall within the domain of a company's Training and Development program?	1.315	.873	1.418	.851	0.53	NS

*Significant at .05 level.

TABLE III

COMPARISON OF THE OPINIONS OF PARTICIPANTS WHO ARE EMPLOYED BY A BUSINESS WITH OVER 500 EMPLOYEES AND THE OPINIONS OF PARTICIPANTS EMPLOYED BY A BUSINESS WITH UNDER 500 EMPLOYEES

	Employs More than 500		Employs Less than 500		t	P
	M	σ	M	σ		
Do you believe a company has the responsibility to provide EPAP?	1.384	.846	1.225	.891	.819	NS
Do you believe EPAP falls within the domain of a company's Training and Development program?	1.15	.932	1.641	.668	2.654	S*
Do you believe EPAP are important enough that one or more courses in a college Training and Development Curriculum should offer EPAP?	1.48	.768	1.615	.586	.894	NS

*Significant at the .01 level.

Both groups responded positively when the participants were asked if EPAP were of enough importance that one or more courses in this area should be included in a college level training and development curriculum. There was not a significant difference between the group means with respect to this question.

These same three questions were analyzed by dividing the participants into groups based on the number of full-time employees their business hires. This analysis is summarized in Table III. The participants were divided with those who worked for a business employing 500 or more full-time people in one group and those who worked for a business employing less than 500 full-time employees in the other group.

Both groups had a positive mean score for the questions which ask their opinions on whether or not they believed that a business has the responsibility to provide EPAP. There was not a statistically significant difference between the mean score of the two groups with regard to their answers to this question.

The groups were significantly different at the .01 level with respect to their answers concerning whether the participants felt that EPAP falls within the domain of a businesses' training and development programs. The mean scores from both groups were each positive. The participants from businesses employing fewer than 500 full-time people had a much higher mean score than the businesses employing 500 or more full-time employees.

When the participants were asked if they believe that EPAP were of enough importance that one or more EPAP courses in a college level training and development curriculum should be included, both groups tallied

a positive mean score. There was not a statistical difference between the groups with respect to this question. The responses to this question were similar to the responses of the preceding question in that the participants from businesses employing fewer than 500 full-time persons had a higher mean score than did the participants from businesses employing 500 or more full-time persons. It should be pointed out, however, that over twice as many businesses employing 500 or more full-time persons offer EPAP as do businesses employing less than 500 full-time persons.

Current Status of EPAP in Oklahoma Businesses

Participants who were employed by businesses that currently were offering EPAP were asked to complete the second part of the questionnaire. These results are summarized in Tables IV, V, and VI.

The participants were asked to indicate which specific type(s) of EPAP were currently being offered. The summary of the results of this part of the study are presented in Tables IV and V.

Table IV contains a list of specific programs that the review of literature indicated to be the most popular EPAP. All of the specific programs listed in Table III were also included in the questionnaire. While some programs were more popular than others, all of the programs were offered by some of the businesses.

Retirement planning was the most popular program offered. It was offered by over 60 percent of the businesses that were offering EPAP.

Alcoholic rehabilitation and financial counseling were the next most popular programs. They were offered by over 50 percent of the businesses. Cardiovascular fitness programs, overweight counseling, and

TABLE IV
TYPE OF EPAP AND THE PERCENTAGE OF OKLAHOMA
BUSINESSES OFFERING THEM

Types of EPAP	Percentage of Businesses Currently Offering These Programs
Drug Rehabilitation	40.54
Alcohol Rehabilitation	51.35
Financial Counseling	51.35
Marital Counseling	16.21
Family Counseling	24.32
Cardiovascular Counseling	18.91
Other Physical Fitness	32.43
Psychological Counseling	29.72
Stress Reduction	40.54
Legal Matters	16.21
Retirement Planning	62.16
Overweight Counseling	24.32
Smoking	21.62

TABLE V
LIST AND FREQUENCIES OF EPAP THAT WERE NOT INCLUDED ON
THE QUESTIONNAIRE BUT LISTED UNDER "OTHERS"

Type of EPAP	Frequency
Home Repair	1
High School GED	1
Disco	1
Photography	1
High Blood Pressure Checks	1
First Aid	1
CPR	2
Health Screening Program	1
Career Planning	1
Role Negotiation	1
Conflict Management	1
Staff Development	1
Functional Training	1

TABLE VI
THE RESPONSIBILITY FOR HELPING AN EMPLOYEE

The Responsibility for Helping an Employee Rests with:	Percentage of Businesses Utilizing
1. Employee's supervisor only	6.45
2. Someone other than the employee's supervisor--in house	16.12
3. Outside counseling firm only	3.22
1 and 2 above	25.80
1 and 3 above	3.22
2 and 3 above	3.22
1, 2, and 3 above	38.70

help with legal matters were the three most unpopular programs. Even the most unpopular program was offered by 16 percent of the businesses offering any EPAP. If the businesses represented were offering any additional EPAP that were not listed on the questionnaire, the participants were asked to list those programs. Table V contains a list of the additional programs and the frequency with which they were listed. Thirteen additional programs were listed by participants representing nine different businesses. The only additional program that was currently being offered by more than one business was Cardio-Pulmonary Resuscitation (CPR). CPR was being offered by two businesses.

Analysis of the Ways EPAP Were Administered by Businesses

The survey indicated that there was little difference between the type of EPAP offered to the management level employee and the type of EPAP offered to the non-management level employee. Of the businesses represented in the survey, 86.84 percent made no distinction between the type of EPAP offered its employees. Three of the businesses indicated that certain programs were made available to management level employees but not to non-management level employees. In each case, the management level employee was offered a wider range of programs. Only two of the businesses made EPAP available only to management level employees.

The person or group of persons that was given the responsibility for an employee with specific areas of EPAP is outlined in Table VI. The responsibility for helping an employee was assigned to someone in the company other than the employee's supervisor in 16.12 percent of the businesses. The responsibility for helping an employee was shared

with someone in the company other than the employee's supervisor and the employee's supervisor in 25.80 percent of the businesses. The responsibility for helping an employee was shared between the employee's supervisor, someone in the company other than the employee's supervisor, and an outside consulting firm in 38.70 percent of the businesses. In only 16.11 percent of the businesses was responsibility for helping an employee:

1. assigned to the employee's supervisor,
2. assigned only to an outside consulting firm,
3. shared between the employee's supervisor and an outside consulting firm,
4. shared between someone in the company other than the employee's supervisor and an outside consulting firm.

In summary, employees' supervisors were responsible for the employees to some extent in 74.17 percent of the businesses. Someone in the company other than the employee's supervisor was responsible for the employee to some extent in 83.84 percent of the businesses, while the outside consulting firm was responsible for the employee to some extent in 48.36 percent of the businesses.

In addition to giving the employee's supervisor at least some responsibility for helping an employee, 48.64 percent of the businesses had a company policy to make the employee's supervisor aware of an employee's problem. Of the remaining 51.36 percent of the businesses, 45.94 percent had a company policy to inform the employee's supervisor sometimes, depending on the circumstances. All of the businesses did, however, have as their company policy to keep confidential all information provided by an employee at an EPAP.

In 73.68 percent of the businesses represented, an employee's family was allowed to participate in EPAP. The family members were encouraged to participate in the EPAP in 55.26 percent of the businesses. Only 7.89 percent of the businesses that allowed an employee's family to participate in EPAP did not encourage the family's participation.

By knowing whether or not EPAP were offered on company time or employee's time and by knowing how much company time was allocated to EPAP, some insight into the businesses' commitment toward EPAP could be gained. The next part of the analysis deals with these areas.

EPAP were offered solely on company time in 23.68 percent of the businesses and solely on employee time in 2.63 percent of the businesses. EPAP were offered both on company time and employee time in 73.68 percent of the businesses.

Only 10.81 percent of the businesses regularly allocated a specific amount of company time for EPAP. Three of the four businesses that regularly allocate company time for EPAP allow an employee between one hour and two hours per week to participate in EPAP. The other business that regularly allocated company time for EPAP allows employees more than five hours per week to participate in EPAP. The remaining 89.19 percent of the businesses allocate company time for EPAP depending on each particular employee's personal situation.

The location of where EPAP are offered relates closely with when EPAP are offered. EPAP were offered solely on company premises by 31.57 percent of the businesses and were offered solely off company premises by 5.26 percent of the businesses. The remaining businesses, 63.15 percent, were presently offering EPAP both on and off company premises.

When asked who pays for EPAP, the businesses were split almost equally between having the business pay 100 percent of the cost (51.35 percent of the businesses followed this procedure) and having the firm and employee split the cost (48.65 percent of the businesses followed this procedure). There was little information from the study as to what percentage of the cost of the EPAP the employee was responsible for paying. The businesses that share the cost were divided almost equally as to having the employee pay less than one-third of the cost (22.77 percent), having the employee pay between one-third of the cost but not over two-thirds of the cost (27.77 percent), and having the employee pay over two-thirds of the cost but less than all of the cost (44.44 percent).

In an attempt to gain an insight into the relationship between a specific businesses' training and development budget and a specific businesses' EPAP budget, participants were asked to include this information if the information is not confidential. Based on the responses to these two questions, the information was either confidential or unavailable to the participant or unknown to the participant. So few participants were able to complete these questions successfully that they were not considered when analyzing the results.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The purpose of this study was to identify the current status of EPAP of selected Oklahoma businesses. By determining the current status of EPAP, businesses in Oklahoma might be able to readjust their training and development programs so that employees will begin to feel better about who they are and what they are doing with their lives, while at the same time increasing their productivity on their jobs. The members of the Oklahoma City chapter and the Tulsa chapter of the ASTD were selected as participants in this study. This group was selected because it is believed that their businesses, because of geographical location, would have a professional interest in a study dealing with training and development conducted at Oklahoma State University.

The main objectives of this study were:

1. to determine how members of the Oklahoma chapters of ASTD perceive EPAP,
2. to determine what EPAP are currently being offered by Oklahoma businesses, and
3. to determine how Oklahoma businesses are administering their EPAP.

The questionnaire from this study was constructed after studying several sources. First, a questionnaire from a study with a similar

purpose was used as the model for the questionnaire used in this study. The model questionnaire was modified and expanded into its present form by integrating and incorporating the goals and objects of this study with the questions collected from reviewing the literature into the format used by the model questionnaire.

The first objective was to determine how members of Oklahoma chapters of the ASTD perceived EPAP. The ASTD members as a whole felt that business does have the responsibility to offer EPAP. The general consensus of the group was that EPAP fall within the domain of a business' training and development program. The group also believed that EPAP are of enough importance that at least one course dealing with EPAP should be included in a college-level training and development curriculum.

The second objective was to determine which specific EPAP were being offered by Oklahoma businesses. The specific programs listed in the questionnaire were those that the review of literature indicated were the most popular programs. This point seems to be supported by this study. All of the programs listed in the questionnaire were being offered by at least some of the businesses. Retirement planning was the most popular program. Alcoholic rehabilitation and financial counseling were each being offered by a majority of the firms offering EPAP. Marital counseling, cardiovascular fitness, help with legal matters, and overweight counseling were the least popular programs. All of these programs, however, were being offered by no fewer than 16 percent of the businesses. The participants were also asked to indicate any additional EPAP their firms offered. Only nine participants listed additional programs. Thirteen additional programs were listed. CPR training was

the only program listed by more than one participant. This would also seem to indicate that the specific programs listed in the questionnaire instituted a comprehensive list of the EPAP that are currently being offered by business firms.

The third objective was to determine how Oklahoma businesses administer their EPAP. Almost all of the businesses represented indicated that they make no distinction between the type of EPAP offered to management and to non-management employees. The responsibility for helping an employee was most often shared between someone in the company other than the employee's supervisor and the employee's supervisor or someone outside of the business.

Employees' supervisors were given at least partial responsibility for helping employees in 75 percent of the businesses. This statistic seems to indicate a probable inconsistency in the response of the participant with regard to the confidentiality of information provided by the employee at a specific EPAP. In 94.59 percent of the businesses, it was company policy to make the employee's supervisor aware of an employee's problem, or it was company policy to make the employee's supervisor aware of some of the employee's problems.

All of the businesses represented (100 percent), however, stated that it was company policy to hold confidential all information gathered from an employee at an EPAP.

Almost two-thirds of the businesses represented encouraged members of the employee's family to participate in company sponsored EPAP. All but three of the businesses allowing family members to participate in company-sponsored EPAP also encouraged family members to participate.

In a majority of the cases, the time provided for EPAP was shared between the time provided by the company and the off-duty time of employees. The programs were offered both on and off company premises. The trend that developed with regard to paying for EPAP was that the company either paid the full bill or the cost was divided between the employee and the company.

Conclusions

The conclusions of this study are based on the results of the current descriptive analysis of EPAP in Oklahoma businesses and on the review of literature.

1. The formal education system both on the high school and college level is not preparing people for the full-time status as consumers. Whether or not business wants the job of providing this type of training is irrelevant from a need standpoint.

2. Programs on the college level that are educating students for a career in the training and development area should include some type of course, or courses, that focus on EPAP.

3. Oklahoma businesses may need to re-structure their EPAP in order to protect the confidentiality of the information that the employee provides at an EPAP. Confidentiality cannot be protected as long as it is company policy to inform the supervisor of an employee's problem or as long as it is company policy to have the employee's supervisor help administer the EPAP.

4. Only three businesses that offer EPAP have a set amount of time for EPAP. The rest of the businesses that offer EPAP indicated that the amount of time they provide for EPAP depends on the situation. Although

it is good to be flexible with the time available to allocate to EPAP, without a set amount of time it is possible that the company-sponsored EPAP are not as successful as they might be if they were offered on a regular basis.

5. A review of the literature would indicate that EPAP are becoming very popular with business firms. This study seems to indicate that Oklahoma businesses may not be as interested in EPAP as are businesses elsewhere in the nation. This conclusion relates very closely with the facts Beyda (7) drew from her study. The conclusion she made was that business' interest has not increased to the extent indicated by the literature.

Recommendations for Future Research

The following suggestions for further research have grown out of the present research:

1. The employees of businesses need to be surveyed to determine what their wants and needs are in the area of EPAP. The results could then be analyzed in relationship to how management of the same business firms view the need for EPAP.

2. Several longitudinal studies have been done dealing with the benefits of company-sponsored physical fitness programs. Needed now is a longitudinal study dealing with what benefits can be derived from more traditional company-sponsored consumer educational programs.

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APPENDIXES

APPENDIX A

THE SURVEY INSTRUMENT

No. _____

QUESTIONNAIRE

The purposes of the questionnaire are to determine the current status of selected employee personal assistance programs (EPAP) in Oklahoma and to discover the opinions of training and development personnel with respect to EPAP.

In this questionnaire, EPAP will refer to those programs offered by business in an attempt to help employees lead happier, healthier, and more satisfied lives, while also helping them to become more productive employees. Examples of these types of programs would be alcohol rehabilitation, cardiovascular fitness programs, and stress reduction programs.

1. Approximately how many full-time persons does your company employ?

2. Do you believe that a company has the responsibility to provide EPAP?
Yes _____ No _____ Undecided _____
3. Do you believe that these types of programs should fall within the domain of a company's training and development program?
Yes _____ No _____ Undecided _____
4. If your company currently offers any EPAP, are they offered through (or are they the responsibility of) your training and development department?
Yes _____ Some programs are _____
No _____ My firm does not offer any of these types of programs _____
5. If you answered "no" or "some programs are," are they the responsibility of a training and development section of another department--personnel?
Yes _____ No _____ Some programs are _____

Questions 6 through 15 relate to a number of specific EPAP. The programs are listed in the column headings at the right. Please check yes or no in front of the columns following each question and then check the appropriate column for each question.

If yes, which one(s)?	Y	E	S	N	O	Drug Rehabilitation	Alcohol Rehabilitation	Financial Counseling	Marital Counseling	Family Counseling	Cardiovascular Fitness	Other Physical Fitness	Psychological Counseling	Stress Reduction	Legal Matters	Retirement Planning	Overweight Counseling	Smoking Counseling	Others---Please List	
13. Do you believe the company should have the option to fire an employee whose work has suffered and who has refused to get help for the problems listed?																				
14. Are members of the employee's family allowed to participate in any of the programs listed?																				
15. Are members of the employee's family encouraged to participate in any of the programs?																				

16. Is it your company's policy to make the employee's supervisor aware of the employee's problem?

Yes _____ Sometimes, depends on
 No _____ the circumstances _____

17. Is it your company's policy to keep the information gathered from an employee at an EPAP confidential?

Yes _____ No _____

18. Are your company's EPAP offered on:

Company time _____ Employee time _____ Both _____

19. If your answer to #18 was "company time" or "both," approximately how much company time is made available per week?

Less than 1 hour _____ 4-5 hours _____
 1-2 hours _____ Over 5 hours _____
 2-3 hours _____ Depends on _____
 3-4 hours _____ the situation _____

20. Are your company's EPAP offered on:

Company premises _____ Off company premises _____ Both _____

21. Who pays for your company's EPAP?
The company _____ The employee _____ Both _____
22. If your answer to #21 was "Both," approximately what percentage does the company pay?
Less than 33% _____ 33-66% _____ Over 66% _____
23. If the information is not confidential, approximately what is the annual dollar amount your company currently spends on EPAP? _____
24. If the information is not confidential, approximately what is the annual dollar amount of your company's training and development budget? _____
25. Do you think EPAP's are of enough importance that one or more courses in a college training and development curriculum should be offered?
Yes _____ No _____ Undecided _____

If you would like a summary of the results, check here: _____

APPENDIX B

MODEL QUESTIONNAIRE

EMPLOYEE SATISFACTION

Questions	Choices
1. Considering everything, how would you rate your overall satisfaction in the company at the present time?	Satisfied Dissatisfied Neither
2. How do you feel about the amount of work you do?	Too Much Right Amount Too Little
3. How do you like your job--the kind of work you do?	Good Average Poor
4. I feel my job makes the best use of my abilities.	Yes No
5. How do you feel about the quality of supervision you get?	Good Average Poor
6. Do you feel the company is concerned about your performance?	Yes No

PERCEPTION, PROBLEM AWARENESS AND COMPANY POLICY

Questions	Responses	
7. Do you know of anyone in your unit who has missed work because of the following problems?	Alcohol Habit _____ Drug Habit _____ Marital _____	Overweight _____ Psychological _____ Smoking _____
8. In your opinion, has anyone in your organization hindered everyday business because of a problem?	Alcohol Habit _____ Drug Habit _____ Marital _____	Overweight _____ Psychological _____ Smoking _____
9. Do you feel the company should provide private, personal assistance with a professional counselor in any of the following problems?	Alcohol Habit _____ Drug Habit _____ Marital _____	Overweight _____ Psychological _____ Smoking _____
10. I think that programs such as these are a good idea and should be implemented.	Alcohol Habit _____ Drug Habit _____ Marital _____	Overweight _____ Psychological _____ Smoking _____

Questions

Responses

- | | | |
|---|--|--|
| 11. Would you seek information from one of these counselors if they were available on a confidential basis? | Alcohol Habit _____
Drug Habit _____
Marital _____ | Overweight _____
Psychological _____
Smoking _____ |
| 12. I think the company has the right to fire an employee whose work has suffered because of the following problems. | Alcohol Habit _____
Drug Habit _____
Marital _____ | Overweight _____
Psychological _____
Smoking _____ |
| 13. I think the company has the right to fire an employee whose work has suffered and who has refused to get help for the following problems. | Alcohol Habit _____
Drug Habit _____
Marital _____ | Overweight _____
Psychological _____
Smoking _____ |
| 14. If you needed help in any of the above areas (alcohol, drug, etc.), would you feel free to speak to your supervisor about the problem? | Alcohol Habit _____
Drug Habit _____
Marital _____ | Overweight _____
Psychological _____
Smoking _____ |
| 15. Should the supervisor be made aware if any of the employees in his or her unit has sought help in the following areas? | Alcohol Habit _____
Drug Habit _____
Marital _____ | Overweight _____
Psychological _____
Smoking _____ |
| 16. The programs should take place inside the company. | Inside _____
Outside _____ | |
| 17. Should the company pay for the program? | Company _____
Employee _____
Split _____ | |

APPENDIX C

FIRST COVER LETTER



Oklahoma State University

COLLEGE OF BUSINESS ADMINISTRATION

STILLWATER, OKLAHOMA 74074
(405) 624-5064

November 26, 1979

Dear

The Department of Administrative Services and Business Education at Oklahoma State University recently started offering a Training and Development option for a Master's of Science Degree. We are presently involved in a research project designed to discover the current status of certain Training and Development programs offered by business firms in Oklahoma.

You were selected as a participant for this study because of your affiliation with the American Society of Training and Development and because of your geographic location. Because of these two factors, your input for this research is critical.

The information you provide will be held in strict confidence. The questionnaires are numbered in order to avoid repeatedly bothering participants who have returned questionnaires and in an attempt to facilitate the tabulation process.

A brochure describing the Training and Development option has been enclosed for your information.

We would appreciate your completing and returning the questionnaire by December 14, 1979.

Sincerely,

Stan Mitchell
Researcher

Herbert M. Jelley
Professor of Business Education

SRM/HMJ:ndr

Enclosures

APPENDIX D

BROCHURE INCLUDED WITH FIRST QUESTIONNAIRE

Training and Development for Business

Master of Science Program

The Department of Administrative Services
and Business Education

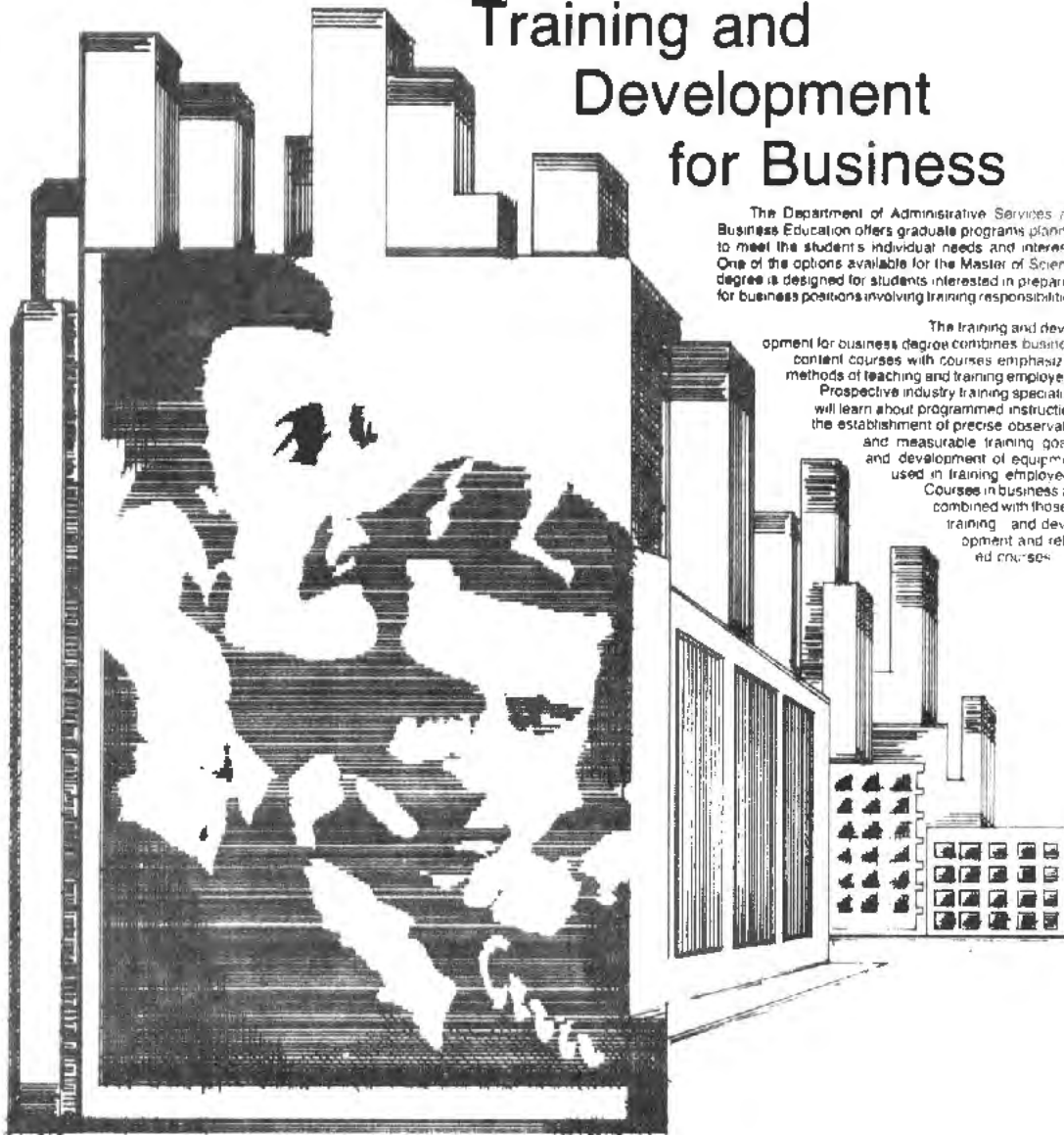


College of Business Administration
Oklahoma State University
Stillwater, Oklahoma

Training and Development for Business

The Department of Administrative Services and Business Education offers graduate programs planned to meet the student's individual needs and interests. One of the options available for the Master of Science degree is designed for students interested in preparing for business positions involving training responsibilities.

The training and development for business degree combines business content courses with courses emphasizing methods of teaching and training employees. Prospective industry training specialists will learn about programmed instruction, the establishment of precise, observable and measurable training goals and development of equipment used in training employees. Courses in business are combined with those in training and development and related areas.



Opportunities for Training and Development for Business

Business firms have responded to the changing learning needs of employees by developing extensive education and training programs. In a recent study of these programs, The Conference Board (an independent, nonprofit business research organization) estimated that 45,000 employees devote all or most of their time to education and training duties.

In 1975, private industry spent about \$1.6 billion for education and training activities conducted in-house. The money was used for the salaries of full-time education and training staff, travel and living expenses and payments for services and materials purchased and rented.

Industry is, in fact, an important part of our nation's educational system. Companies develop their own courses and curricula, employ teaching professionals, carry on instructional activities and evaluate their methods and programs. In many cases, firms do these things in well-designed and equipped facilities that are devoted exclusively to education and training.

Why has training and development become so important for industry? Partly because of the need to accommodate the turnover and growth in personnel. As employees quit, retire, or are promoted to new jobs, other employees must be taught to take over their duties. Too, new needs are constantly emerging because of ventures into new products, because of new knowledge and because of new methods and techniques.

Increased education and training activities also stem from the need to improve the skills and performance of employees in their present jobs. As more skill is required for jobs, the potential for improvement in the quantity and quality of work increases. Thus training is viewed by management as an investment in human capital.

Recognizing that all learning does not happen in traditional ways, some firms have embarked on educational programs that are not really academic in nature but are designed to aid in human development. At least one major firm has a social-service leave program which enables employees to take a paid sabbatical to work in a nonprofit, socially oriented agency. Perhaps it is a recognition of this broad type of industry training that prompted the publishers of a training magazine to change its name from *Training in Business and Industry* to *Training: The Magazine of Human Resources Development*.

The Department of Administrative Services and Business Education of the College of Business Administration has designed a master's degree program to prepare persons to work in industry training positions.

Content of the Program

The program requires a minimum of 36 credit hours. Students must complete a designated number of semester hours of course work in training and development courses, in related business areas, in related instructional areas and in approved business content courses. An internship of one semester or one summer term with a cooperating business firm is an optional part of the program.

Professional Training and Development Courses

(minimum of 12 semester credit hours).

Seminar in Business Education BUSED 5220

Analyzing and diagnosing educational needs; constructing and using survey instruments, including questionnaires and interview guides (3 credits).

Analyzing skills and knowledge requirements for on-the-job training and development; selecting, training and supervising instructors (3 credits).

Problems in Business Education BUSED 5110

Evaluating existing courses and materials used in training and development programs (2 credits).

Designing learning programs, including writing objectives, selecting methods and evaluating methods (2 credits).

Business Education Workshop BUSED 5660

Preparing instructional materials, including writing scripts and producing slide-tape presentations and television programs (1-3 credits).

Professional development activities, including planning of seminars and conferences (2 credits).

Related business areas (9 credit hours).

Management of Manpower Programs. MGMT 4813 (3 credits).

Seminar in Personnel Management. MGMT 5225 (3 credits).

Seminar in Business Communications. GENAD 5113 (3 credits).

Related Instructional Areas

(minimum of 6 semester credit hours selected with approval of adviser).

Production of Instructional Materials. C&IED 4113 (3 credits).

Audiovisual Communication Strategies C&IED 5753 (3 credits).

Industrial and Organizational Psychology. PSYCH 3333

Principles of Counseling Psychology. PSYCH 5083 (3 credits).

Advanced Educational Psychology. ABSED 5213 (3 credits).

Electives may be selected with approval of adviser from the courses approved for graduate credit in such fields as accounting, business law, communications, data processing, economics, finance, management, marketing and statistics.

Internship (optional)

Field Study. BUSED 5330 (1 credit)

Admission Requirements

The basic qualification for admission to the Graduate Program is a bachelor's degree from an accredited college or university. Prospective students are expected to have acceptable scores on the Miller Analogies Test (MAT). Arrangements to take the examination can be made at Oklahoma State University or at other designated test centers throughout the country. (Satisfactory scores on the Graduate Record Examination or the Graduate Management Admissions Test may be substituted.)

To be eligible to begin work on this major, students must have completed a minimum of 24 semester credit hours in courses in business. This minimum may include credit earned in courses in the following and similar fields: accounting, business education, business law, communications, data processing, economics, finance, general business, management, marketing, statistics and office skills.

The Committee for Graduate Programs in the Department of Administrative Services and Business Education recommends admission without qualification for prospective students who have earned a grade point average of 2.75 (on a four-point scale) or better in either of the following: (a) all undergraduate work or (b) the last 60 semester hours of undergraduate work; who have other indications of promise such as relevant work and leadership experience; and who have an acceptable score on the entrance examination (MAT).

Financial Assistance

Graduate Assistantships. Stipends for master's candidates are \$1800 (one-quarter time) and \$2475 (three-eighths time) for the academic year. Duties involve assisting professor with research or instructional responsibilities.

Tuition. Out-of-state portion of tuition (\$40 per credit hour) is waived for graduate assistants. Only the general in-state fee of \$20.75 per semester credit hour is paid by the student.

Fee Waiver Scholarship. A limited number of in-state fee waiver scholarships are available.

Applications. Forms should be submitted by March 1 each year. Appointments will be made by April 15 for the next academic year. Applications received after the deadline will be considered if vacancies occur.

For additional information and application forms write

Dr. Lloyd L. Garrison, Head
or Dr. Herbert M. Jelley, Coordinator of
Graduate Programs
Department of Administrative Services
and Business Education
College of Business Administration
Oklahoma State University
Stillwater, OK 74074

Graduate Faculty

Department of Administrative Services and Business Education

Dr. Lloyd L. Garrison
Department Head
Accounting Education
Business Curriculum

Dr. John T. Bale, Jr.
Associate Dean, College of Business Administration
General Business Education
Accounting Education

Dr. Marvin E. Barth
Administrative Systems

Dr. Harold A. Coonrad
Communications
General Business Education

Dr. Hal W. Ellis
Business Law

Dr. Joe W. Fowler
Business Law

Dr. Herbert M. Jelley
Coordinator of Graduate Programs
Administrative Office Management
General Business Education

Dr. Jimmy G. Koeninger
General Business Education
Organizational Communication

Dr. Glenn E. Laughlin
Business Law

Dr. Phillip V. Lewis
General Business Education
Organizational Communication

Dr. Clayton B. Millington
Economic Education

Dr. Dennis L. Mott
General Business Education
Administrative Office Management

Dr. G. Daryl Nord
Information Systems

Dr. Arnola C. Ownby
Economic and General Business Education
Administrative Office Management

Dr. Jeanine N. Rhea
General Business Education
Women in Management

Dr. Walter L. Starks
Distributive Education

Oklahoma State University, in compliance with Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972, does not discriminate on the basis of race, color, national origin, sex, qualified handicap or disability in any of its policies, practices, or procedures. This prohibition includes but is not limited to admission, employment, financial aid, and educational services.

APPENDIX E

SECOND COVER LETTER


Oklahoma State University

COLLEGE OF BUSINESS ADMINISTRATION

STILLWATER, OKLAHOMA 74074
(405) 624-5064

December 17, 1979

Dear

On November 26, 1979, we mailed you a questionnaire in an attempt to discover the current status of certain Training and Development programs offered by business firms in Oklahoma.

In case you did not receive the first questionnaire, or in case the first questionnaire has been misplaced, we are enclosing an additional questionnaire with this letter.

The Department of Administrative Services and Business Education at Oklahoma State University recently started offering a Training and Development option for a Master's of Science Degree. Although the response to our first questionnaire was good, your input because of your affiliation with the American Society of Training and Development and because of your geographic location, is important.

We realize that this is a busy time of the year, but we would appreciate your taking the time to complete and return the enclosed questionnaire.

Sincerely,

Stan Mitchell
ResearcherHerbert M. Jelley
Professor of Business Education

SRM/HMJ:ndr

Enclosures

VITA²

Stanley Robert Mitchell

Candidate for the Degree of

Doctor of Education

Thesis: A DESCRIPTIVE ANALYSIS OF EMPLOYEE PERSONAL ASSISTANCE PROGRAMS
OF SELECTED OKLAHOMA BUSINESSES

Major Field: Business Education

Biographical:

Personal Data: Born in Graham, Texas, January 10, 1954, the son of
Mr. and Mrs. Harry L. Mitchell.

Education: Graduated from Permian High School, Odessa, Texas, in
May, 1972; received Bachelor of Business Administration degree
in General Business from the University of Texas at Austin
in 1975; received Master of Business Administration degree in
Finance from the University of Texas at Austin in 1977; com-
pleted requirements for the Doctor of Education degree at
Oklahoma State University in May, 1980.

Professional Experience: Teaching assistant, Department of Home
Economics, University of Texas at Austin, 1976-77; graduate
teaching assistant, College of Home Economics, Oklahoma State
University, 1977-78; graduate teaching associate, College of
Business Administration, Oklahoma State University, 1978-80;
field appraiser, Payne County Assessor's Office, 1978-80.

Professional Organizations: Delta Pi Epsilon, Phi Delta Kappa,
American Council on Consumer Interests.