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Standards for Employee Assistance Programmemes in South Africa

EAPA South Africa Branch

PREFACE

Dear Esteemed Colleagues and Members of the EAPA-SA Community, as the President of the Employee Assistance Professionals Association of South Africa (EAPA-SA), it is both an honour and a privilege to introduce this updated and comprehensive compilation of standards that will serve as a cornerstone for our profession.

The standards outlined in this book are not merely guidelines; they are a testament to our commitment to excellence, integrity, and professionalism in the field of employee assistance.

In an ever-evolving landscape of workplace dynamics and mental health challenges, the importance of adhering to both clinical and non-clinical standards cannot be overstated. These standards elevate our practice, ensuring we not only meet the needs of those we serve but also uphold the highest ethical principles that define our profession.

The clinical standards are particularly vital in guiding professionals to maintain ethical and clinical integrity in their practice. They provide a framework for delivering high-quality care, fostering trust, and ensuring that our interventions are both effective and respectful of the individuals we support. By adhering to these standards, we affirm our dedication to our clients' well-being, ensuring they receive the best possible support in their times of need.

Equally important are the non-clinical standards, which play a crucial role in shaping the organisational culture and operational effectiveness of the companies we serve. These standards empower employees and leaders alike, promoting best practices that enhance workplace well-being and productivity. By implementing these guidelines, organisations can create environments that support mental health while encouraging growth, collaboration, and resilience across the workforce.

Together, the clinical and non-clinical standards form a holistic approach to employee assistance, reinforcing our role as trusted professionals in the field. They remind us that our work extends beyond individual client interactions; it encompasses the broader organisational context in which we operate. As we embark on this journey to uphold these standards, let us remember that our commitment to professionalism is not just about compliance; it is about fostering a culture of excellence that benefits our clients, our organisations, and our profession as a whole.

I invite you to engage with this book, to reflect on its contents, and to integrate these standards into your practice. Together, we can continue to elevate the field of employee assistance, ensuring that we are not only practitioners but also champions of workplace well-being.

With warm regards,



RADHI VANDAYAR
President, EAPA-SA (2023-2026)

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1. STANDARDS DOCUMENT

1.1 STRUCTURE

These standards are presented as a benchmark for EA practice and should be adapted without compromising the underlying principles. The status of the programme, i.e. the design, implementation or evaluation phase, must be taken into account.

Each standard is structured as follows:

- **Standard:** The agreed level of best professional practice.
- **Goal:** A broad general description explaining the purpose of the standard.
- **Objective:** Describes the specific elements of the goal.
- **Motivation:** Rationale for the standard.
- **Criteria:** These features must be present to meet the objective of the standard and for the service to be described as an EAP.
- **Guidelines:** These discuss the various professional options and the best practices that have evolved in certain situations. They offer ideas to those tailoring their services to meet both typical and atypical customer requirements.

1.2 PURPOSE

The purpose of the Standards is:

- To develop a benchmark model for Employee Assistance Programmes, providing a foundational reference point for assessing and refining the efficacy of workplace support interventions
- To provide a quality assurance mechanism for EAP's
- To describe the scope of EAP services
- To operationalise programme standards and guidelines
- To educate the work community about EAP services

1.3 DEFINITION OF AN EAP

EAPA-SA defines an EAP as follows:

An Employee Assistance Programme is the practice of applying core technologies to proactively manage employee and organisational wellness.

GLOSSARY

(The following should not be read as definitions but rather as descriptions.)

Aftercare: Assistance to an employee in reintegrating into the workplace following treatment.

Addiction: A compulsive and repetitive engagement in substance use or behavioural activities despite adverse consequences, leading to long-term neurological and

physiological changes and impacting an individual's cognitive, emotional and social functioning.

Chemical dependency: Psychological and/or physical dependency on alcohol and/or other drugs.

Client: Individual employee/group/family member who are beneficiaries of the EAP services because of personal and/or work-related issues.

Corporate client: A work organisation utilising an EAP.

Case management: The process of managing and monitoring an intervention from the start to a logical conclusion.

Clients counselling: Therapeutic intervention by a trained professional, i.e. Social Worker, Psychologist or Psychiatrist.

Crisis: A stressful life experience that disrupts the normal functioning of an individual, family, group or organisation and threatens their stability and ability to cope or function.

EAP: Employee Assistance Programme.

EAPA-SA: Employee Assistance Professionals Association of South Africa.

EAPA-SA Board: The elected Board of EAPA-SA.

EA Coordinator: Provides general employee assistance administrative support to clients and colleagues to enable operational administrative integrity of employee

assistance practices. The services are non-clinical.

In general, the role of this category of professional may include:

- Providing employee assistance information
- Identifying and checking of documents
- Ensuring that employee assistance organisational documents comply with the relevant legislation and regulations
- Stakeholder relations
- Implementation of interventions

EA Professional: A person who meets the minimum requirements to perform EA specialised functions including therapeutic services. They provide clinical therapeutic services to employees and their immediate family members. The EA Professional guides the client to develop a plan of action to address personal or work-related problems. A core function of the EA Professional is maintaining strict confidentiality of clients' records.

EA Practitioner: A person who meets the minimum requirements to perform EA specific duties, such as client consultation, initial assessment, and referral. They maintain high confidentiality of clients' records. The EA Practitioner helps the client develop a plan of action to address personal

or work-related problems and, where possible, refers the matter internally or externally. The EA Practitioner also coordinates other EA services, such as marketing, supervisory training and workshops on EAP or related services. Progress is monitored and reviewed regularly to ensure clients receive quality services, both internal and external.

EAP Specialist: A person with a Master's or Doctoral degree level performing advanced EAP tasks, i.e. strategic management, stakeholder involvement, research, and analysing market trends.

Employee: A person whose employment is governed by a contract of service or other relevant employment laws.

Employee representative: A person specifically tasked with acting on behalf of employees from organised labour or a staff association.

Employer: A person or an organisation that hires employees and offers remuneration in exchange for labour.

External resources: Any acknowledged resource in the community that provides services.

Follow-up: Any action involving the referring manager/supervisor to evaluate job performance after the initial assessment.

Intervention: Professional guidance to any employee/organisation to manage challenges.

Manager/Supervisor: A person in a position with supervisory responsibilities.

Marketing: The promotion of a specific service to existing/potential clients.

Organised Labour service provider: An agency providing professional services to clients as per a formal contract.

Return on Investment (ROI): A financial metric representing the profitability of an investment relative to its cost. It provides a snapshot of financial profitability from a particular initiative, product, or service.

Return on Value (ROV): A holistic measure that considers an investment's financial and non-financial impacts. It includes factors from customer experience and brand loyalty to innovation, overall customer satisfaction, and long-term sustainability.

Solution-focused brief therapy: A therapeutic approach that emphasises clients' strengths and resources to create positive change. Preferred method of therapy used in EAPs.

Therapy/Treatment: Clinical intervention by a registered helping professional.

Training: Activity imparting knowledge and skills to address personal and productivity issues.

Trauma: Any life-threatening event, outside the range of ordinary human experience, resulting in emotional and/or physical reactions in clients.

VCT: Voluntary counselling and testing.

Well-being: A positive state of physical and emotional wellness.

Wellness: An optimal level of functioning in all dimensions of life.

1.5 EAP CORE TECHNOLOGIES

The specific core technologies or functions of EAPs entail the following:

1.5.1 Training and development

Capacity building of critical stakeholders for the improvement of individual and organisational performance.

1.5.2 Marketing

The promotion of a specific service to existing/potential clients.

1.5.3 Case management

The intervention process for employees with personal and work-related challenges that may affect job performance, which includes:

- Confidential and timely risk identification and assessment,
- Short-term intervention
- Referral, monitoring and follow-up
- Reintegration and aftercare services.

1.5.4 Consultation with work organisations

Strategic consultation with work organisations to proactively address inherent trends resulting from personal or organisational issues.

1.5.5 Stakeholder management

Stakeholder management to establish and maintain effective relations with internal and external role players and service providers.

1.5.6 Monitoring and evaluation

Monitoring and evaluation of the quality and impact of the EAP services relating to the work organisation and individual job performance.

1.6 SIGNIFICANCE AND USE OF PROFESSIONAL STANDARDS

Applying this document will help ensure high-quality EAPs, but it should not diminish the importance of organisational customisation. This flexibility reflects the recognition that many of the guidelines illustrate a variety of ways standards can be implemented.

When designing, implementing, or evaluating an EAP, each organisation should systematically apply these standards and guidelines in accordance with its unique organisational culture and operations.

2. STANDARDS

2.1 PROGRAMME DESIGN

2.1.1 ORGANISATIONAL PROFILING

STANDARD 1

Programme design must be based on a formal assessment of organisational and employee needs.

GOAL

To ensure that programme design includes a profile of the employee population and the organisation for which they work. This assessment is intended to help the organisation determine the most appropriate and cost-effective methods of providing EAP services.

OBJECTIVE

To ensure that the most appropriate EAP is designed.

MOTIVATION

The organisational profile enables the EAP staff to design the most appropriate and cost-effective EAP.

CRITERIA

The organisational profile should be conducted in a factual, objective and unbiased manner.

GUIDELINES

Construction of a comprehensive organisational profile includes:

- Type of organisation
- Number of worksites
- Types of jobs/work and products
- Size of workforce and demographics
- Employee needs in terms of skills, health, employee diversity, gender and ethnicity
- Needs of supervisors, managers and organised labour, especially regarding the format and functionality of the envisaged programme and resulting service
- Gathering of information to identify HR problem areas, such as:
 - Compensation claims
 - Absenteeism patterns
 - Sick leave abuse
 - Disciplinary activities
 - Grievance actions
 - Employee turnover

Additional Information sources to be considered:

- Hazard Identification Risk Assessment (HIRA)
- Business Scorecard
- Organisational culture surveys
- Programme design

See Annexure A – Needs Assessment Tool

See Annexure B – Template: Organisational Profile

2.1.2 POLICY

STANDARD 2

The policy must describe the EAP in its entirety.

GOAL

To ensure that the mandates, guiding principles and focal areas of the EAP are fair, consistently applied and balanced in respect of the interests of all the various stakeholders.

OBJECTIVE

To create a legitimate framework for consistent application.

MOTIVATION

A clearly written policy will ensure consistent application of the EAP's rules and regulations.

CRITERIA

A policy should meet professional best practice by:

- Having clear mandates and programme elements.
- Creating an EAP that is comprehensive and responsive to the needs of the clients.
- Protecting the interests of all the stakeholders.

- Clearly outlining the confidential nature of the EAP.
- Aligning the EAP with the organisational strategy.

GUIDELINES

The policy should make provision for matters such as:

- Employee and dependant access, e.g. language, culture, and gender.
- Specifying the different conditions that may affect job performance, employee functioning and quality of life
- Securing job status, which will not be jeopardised as a consequence of accessing EAP services, except when mandated by law
- Specifying that employees who use an EAP are expected to adhere to the job-performance requirements of the employer
- Clinical records that must be kept strictly confidential to the extent provided for by law and/or regulation, and which will not be noted in any official company record or in the employee's staff file
- All clinical data should be stored for a minimum of five years
- After five (5) years, the data should be disposed of

- Information from the EAP may be released only with the written permission of the employee, as per legal requirements
- The EAP does not exempt employees from normal discipline and can run concurrently
- The EAP policy statement should be displayed in a prominent place in various work-site environments, focusing on the critical components of the EAP
- The organisation providing EAP services to its employees must recognise human capital as an organisational asset
- The EAP policy should be formulated according to a structured process
- EAP policy should be reviewed as per organisational governance requirements

2.1.3 EAP GOVERNANCE COMMITTEE

STANDARD 3

An EAP Governance Committee should sit at the highest possible level within the organisation and include representatives from all segments of the workforce.

GOAL

To ensure that all relevant role players in the organisation, such as top management,

employees, line managers, and organised labour, contribute to the effective design, implementation, monitoring, and evaluation of the EAP.

OBJECTIVE

The terms of reference for the EAP governance committee should include:

- formulating policy and strategy
- advising on the implementation procedure
- assisting with the marketing and promotion of the EAP
- ensuring that the EAP is responsive to the organisational needs
- providing the necessary support; and
- contributing to the monitoring and evaluation procedure

MOTIVATION

Appointing an EAP Governance Committee, representing all relevant stakeholders, will promote a culture of workplace wellness by ensuring the EAP is mainstreamed into organisational systems and processes.

CRITERIA

The organisational structures and practices should guide the EAP Governance Committee and may include:

- Senior management
- Human resources department

- Occupational Health and Safety Representatives or committees
- Business Continuity Committee (BSC)
- Finance department
- Training and development
- Risk management
- Organised Labour
- Line management
- Employee relations specialists
- EAP staff
- EAP Service Provider
- Industry thought leaders

GUIDELINES

- The EAP Governance Committee should be trained on appointment and attend training sessions on EAP-related matters.
- EAP Governance Committee members should review statistics and trends on utilisation.
- EAP Governance Committee members should make recommendations on programme enhancement and alignment.
- The EAP Governance Committee should be fully constituted and could be integrated into an existing related committee.
- The EAP Governance Committee should meet every quarter, unless there is an emergency.

- Members of the EAP Governance Committee should be appointed in writing by the Accounting Officer.

2.1.4 SERVICE DELIVERY MODEL

STANDARD 4

The EAP's service delivery model should be based on sound principles.

GOAL

To ensure the most appropriate and effective model of service delivery, customised to meet the unique needs and resources of both the client and the organisation.

OBJECTIVES

To improve the quality of EAP services and ensure they meet the client's needs, are cost-effective, appropriate, and provide a return on investment.

MOTIVATION

Selecting an appropriate model will enhance the service's credibility and ensure effective, efficient use of resources.

The EAP strategy should be agile and relevant to the organisation's changing needs.

CRITERIA

The following should be considered when selecting an appropriate service delivery model:

- Alignment with existing corporate strategies and philosophy
- The size and structure of the organisation
- The geographical location
- Accessibility to programme and community resources
- Financial resources
- Professional capacity (internal and external)
- Employee preferences
- Organisational culture
- The selected costing model should be compatible with the overall philosophy of the employer and its corporate governance
- The organisation should identify the EAP service delivery model appropriate to the business strategy, e.g. in-house, external outsourcing, combination/hybrid
- Employee benefits should be considered when selecting a pricing model. The pricing of EAPs should be negotiated and mutually agreed upon by the service

provider and the employer after considering different models.

- Models should be transparent and acceptable to all the role players involved.
- The costing must be included in the business plan.

GUIDELINES

- The models of EAP in practice include:
 - Internal – all the functions are performed by internal employees.
 - External – all the functions are performed by a contracted independent service provider.
 - Combination/Hybrid – some services and staff are internal, and the rest are contracted from outside the organisation. The percentage of internal versus external staff/services may vary from one organisation to another.
- The following should be considered:
 - Office space and administrative support
 - Locality should enhance accessibility, privacy and confidentiality
 - Legal compliance in terms of storing documentation.

- Accessibility to outside resources
- An internal programme will operate with the staff of the employer and should be strategically located, i.e., an autonomous section, Human Resources, Medical Services, etc.
- An external programme operates with the staff of a service provider selected and contracted by the employer.
- In combination, certain services will be provided internally (e.g. training), while other services (e.g. clinical/counselling) will be outsourced.
- When the external model is adopted, both the organisation and contracted service provider should appoint someone to manage the contract.
- A final decision on the ideal model should be taken only after proper consultation between the EAP practitioner/professional and stakeholders.
- The credentials of the EAP service provider and its staff should be taken into account when considering an external model.
- A detailed cost analysis should be carried out during the programme design phase.
- A comprehensive budget should be compiled in alignment with the

organisational budget. Compare the pros and cons of all pricing options.

- The costing model should be communicated to all the stakeholders to ensure a clear understanding.

When it comes to service providers, the following should be borne in mind when different options of pricing models are considered:

- a cost for the total service (capitated pricing)
- a fee-for-service
- a co-payment by the healthcare provider
- a co-payment by the client/employee
- limited clinical services

2.1.5 COSTING MODEL

STANDARD 5

Costing models of EAP should be based on sound financial principles

GOAL

To ensure value for money and the most efficient use of financial resources, which drives the applicable EAP delivery model/strategy.

OBJECTIVES

- Ensure a balance between expenditure and benefits.
- Ensure cost effectiveness and optimal use of financial resources.
- Ensure quality and functional appropriateness of the EAP.

MOTIVATION

- When costing the EAP model, the organisation's needs should be met in terms of return on investment.
- The selected costing model should be compatible with the overall philosophy of the employer.
- Models should be transparent and acceptable to all role players involved.
- The selection of an appropriate costing model will enhance the credibility of the service and ensure effective and efficient use of resources.
- The costing model must be included in the EAP strategy.

CRITERIA

The different costing models for EAP may include:

- a cost for the total service (capitated fee per workforce size)
- a fee/agreed rate for services

- subsidised services (employer pays portion of costs & employee pays the balance to the provider)
- limited clinical services
- hybrid between capitation and fee-for-service models
- union-sponsored or subsidised services
- value-added to health, wellness and other products
- EAP/Wellness services as a component of employee benefits structure

GUIDELINES:

- Pricing of EAPs should be negotiated and mutually agreed upon by the service provider and the employer, after different service delivery models have been considered.
- Contracting and partnership decisions should be aligned with the above.
- Economies of scale must be considered as leverage for further value enhancement during contract negotiations.
- Consider the organisation's financial policies and systems when developing specifications, advertising, bid adjudication/evaluation and contracting.
- Ensure that external service providers are registered with EAPA-SA and thoroughly vetted to check their

capacity, which would include the project value, current clientele, and current human capital, including subcontractors' industry.

- Budgeting considerations may include:
 - professional fees (consultation, surveys, group interventions)
 - venues and facilities
 - tools of trade
 - travel and accommodation
 - Continuous Professional Development (CPD)
 - marketing and communications

2.2 IMPLEMENTATION

2.2.1 STANDARD OPERATING PROCEDURE

STANDARD 6

The EAP should have clear standard operating procedures (SOPs) that describe implementation.

GOAL

To provide an operational framework for the EAP.

OBJECTIVE

To provide specific guidelines for the EAP regarding the core technologies and standards and their unique application in each organisation.

MOTIVATION

To provide procedural and logistical guidelines for the implementation of the EAP according to the unique circumstances of an organisation.

CRITERIA

The Standard Operating Procedure (SOP) must:

- be based on and correlate with the organisation's EAP policy.
- be aligned with the organisation's unique operations, infrastructure, profile, procedures, and culture.
- reflect the application of the Core Technologies and Standards, customised for each organisation.

GUIDELINES

The following policy guidelines should be covered in the SOP:

- Programme design
- Programme implementation
- Management and administration
- Clinical services
- Non-clinical services
- Networking
- Monitoring and evaluation

Example of an SOP:

Supervisory training should be administered in the following manner:

- Develop training material relevant to empower supervisors/managers
- Arrange for printing or electronic availability of course material
- Schedule the ideal number of training sessions
- Determine the duration and number of training sessions
- Identify EAP and supporting staff to present the training
- Arrange for the logistics, i.e. booking of training venues and helping aids (video projector, sound system, etc.)
- Develop a system for the nomination of delegates (supervisors)
- Arrange for acknowledgement of completed training, i.e. as a criterion during performance appraisal, and
- Maintain accurate records of attendees by business units.

2.2.2 IMPLEMENTATION PLAN

STANDARD 7

An implementation plan must outline the actions and schedule needed to establish an operationally effective EAP

GOAL

The implementation plan must position the EAP as a holistic and integrated service within the organisation.

OBJECTIVES

- To position the EAP as an integral part of the organisational strategy
- To ensure that the EAP is dealing with all dimensions of employee and organisational functioning/wellness (holistic)
- To mainstream EAP into the organisational culture and integrate with other parts of the organisational value chain

MOTIVATION

- To detail how the EAP will meet the individual employee, team and organisational needs.
- An agreed approach by all role players and stakeholders as to how the EAP will be implemented, monitored and evaluated in line with strategy.

- Consistent implementation across the different organisational units.

CRITERIA

The implementation plan should be reviewed annually during the evaluation process and/or strategic planning session and must stipulate, inter alia, the following:

- Leadership support
- Actions needed
- Timeframe
- Resources
- Person responsible
- Performance indicators
- Targets
- Monitoring, evaluation and reporting

GUIDELINES

The implementation plan should contain the following:

- The geographical location, organisational demographics and staffing, depending on the service-delivery model
- Should outline the actions and responsibilities of all stakeholders
- Should outline resources and timelines required
- Should set targets for utilisation and the number of beneficiaries of EAP services
- Guide management, supervisory and union training

- Provide a marketing plan for the EAP services
- Describe the case management, consultation and referral model
- Provide a consultative advisory service to management, leadership and organised labour
- Detail the monitoring and evaluation process to be followed

2.3 MANAGEMENT AND ADMINISTRATION

2.3.1 HUMAN RESOURCES

STANDARD 8

The provision of human resources should supply and maintain suitably qualified, competent EAP staff with relevant skills to achieve the EAP's stated objectives.

GOAL

To ensure an adequate supply of suitably qualified staff with relevant skills and competency to adequately deliver services according to the EAP strategy and implementation plan.

OBJECTIVES

- To employ an appropriate number of EAP staff to provide adequate service coverage of the workforce

- To ensure that all the EAP staff meet the professional and legal requirements
- To ensure that all the EAP staff comply with the requirements of CPD
- To assign an appropriate number of administrative support staff

MOTIVATION

A suitable ratio of appropriately qualified EAP staff to the number of employees ensures adequate service coverage across the workforce, enabling comprehensive service delivery.

CRITERIA

- Analyse the needs and forecast the demand/ human resources required
- Acquire adequate supply (quantity and quality) as per needs informed by various factors
- Ensure appropriate utilisation:
 - Administrative staff must be orientated and commit to EAP principles of confidentiality and ethical conduct.
 - EAP staff providing counselling are required to promote confidentiality and uphold ethical standards.
 - Managers within an organisation are equally bound to uphold principles of

confidentiality and ethical standards to protect the integrity of the organisation.

- EAP staff should be registered with a professional or statutory body.
- Qualifications for registration should preferably be at fourth year level in any of the following disciplines: Social Work, Psychology, Occupational Health, Pastoral Counselling, Psychiatry, Human Resource Management and Psychiatric Nursing

- Training and Development:

- EAP staff must formalise training and professional development in their performance contracts/work plans and participate in Continuous Professional Development (CPD) activities to keep abreast of professional improvements in EAP practice.

The ideal ratio of EAP staff to the number of employees.

- One (1) full-time EAP professional/practitioner for every 350 employees for an internal

comprehensive model with a **centralised** workforce.

- One (1) full-time EAP staff member for every 200 employees for an internal comprehensive model with a **decentralised** workforce.
- One (1) full-time internal EAP staff member for every 1000 for an external comprehensive model with a **centralised** workforce.
- One (1) EAP professional for every 500 employees, depending on the number of sites and staff complement per site, for an external comprehensive model with a **decentralised** workforce.
- One (1) EAP Professional for every 400 employees for a combination model with a **centralised** workforce, rendering therapeutic services internally and outsourcing the other services.
- One (1) EAP Professional for every 1000 employees for a combination model with a **centralised** workforce, outsourcing the therapeutic services and rendering other services internally.
- One (1) EAP Professional for every 200 employees for a combination model with a **decentralised** workforce, rendering therapeutic services internally and outsourcing the other services.
- One (1) EAP Professional for every 500 employees for a combination model with a **decentralised** workforce, outsourcing

the therapeutic services and rendering other services internally.

GUIDELINES

The following factors could be considered when determining the ideal staffing level for an EAP:

- Geographic location of the workforce
- Ethnic and cultural mix of employee population
- Job descriptions for each EAP staff member
- Organisations choosing to contract EAP services from an external provider must have at least one suitably qualified internal person with formal responsibility for coordinating the delivery of services and monitoring the provider's performance
- The specific model and programme needs inform the appropriate staffing ratio for an organisation
- EAP staff should preferably be registered with a statutory body.
- EAP staff should have a minimum of the EA Coordinator designation (refer to the EAPA-SA Professional Designations Guide document)

See Annexure C, D, E and F – Job Descriptions

2.3.2 EA EMPLOYEE'S PROFESSIONAL CONSULTATION OR SUPERVISION

STANDARD 9

Every EAP employee who provides services will be subject to ongoing consultation and/or supervision.

GOAL

To ensure professional development, improve service quality, and support professional development.

OBJECTIVES

- To protect the employees' and the organisation's interests
- To enhance EAP employee's knowledge, attitude and skills
- To enhance the EAP employee's knowledge, skills and attitudes

MOTIVATION

EAP service delivery affects both staff and clients. Consultation and supervision mitigate isolation, burnout and compassion fatigue to ensure quality services.

CRITERIA

- Consultation and supervision should follow a structured approach under the guidance of an experienced professional.

- Consultation and supervision can be provided internally or externally contracted.
- Peer and individual supervision
- Professional support, coaching and mentoring can also be provided through EAPA-SA chapters' mentorship programme.

GUIDELINES

- Members should have access to professional supervision.
- The professional providing supervision/consultation should have the recommended minimum of five (5) years' experience.
- An appropriate post-graduate and/or management qualification would be recommended.
- It is the responsibility of both the supervisor and supervisee to ensure there is a plan in place for self-care to avoid burnout and promote development.

2.3.3 CONTINUOUS PROFESSIONAL DEVELOPMENT

STANDARD 10

EAP staff must engage in continuous/lifelong learning to maintain professional conduct and competency in their practice.

GOAL

To ensure that EAP staff comply with professional conduct and have the requisite skills and competencies to deliver high-quality professional service and practice.

OBJECTIVES

To guarantee that EAP staff have relevant skills and competencies in line with developments in their professional practice, industry advancements and best practices, and that they adhere to the highest standards of professional practice.

MOTIVATION

EAP staff must participate in and enrol for CPD activities to continually improve their practice.

CRITERIA

- Consultation and supervision should follow a structured approach under the guidance of an experienced professional.

- Consultation and supervision can be provided internally or be externally contracted.
- Peer and individual supervision.
- A professional development plan should be formalised as part of the individual's performance contract/agreement.
- Registration with the relevant statutory body or professional association; and
- Membership of and active participation in EAPA-SA structures.

GUIDELINES

- Benchmarking and sharing of best practices
- Continuous Professional Development
- Obtain formal professional qualifications recognised by SAQA
- Register with a professional/statutory body and annually update membership
- Identify career development needs and ensure growth through Personal Development Plans
- Attend conferences
- Participate in continuous learning activities like contributing to journals and research projects

- Assessment of learning needs and areas of growth should be determined and included in personal development plans
- Annual update of registration should be maintained
- Enrolment for formal qualifications at recognised institutions
- Enrolment for CPD in line with EAPA-SA CPD Policy
- Attendance of a minimum of 75% at EAPA-SA Chapter or Board activities
- Attendance at EAPA-SA Edu week Annual conference and AGM
- Contribution to research and publications in the EAP field
- Subscription to EAP-related journals
- Active with fellow professionals in the field
- Non-professional designated members should have access to professional supervision

2.3.4 PROFESSIONAL LIABILITY INSURANCE

STANDARD 11

All EAP staff must have adequate professional liability insurance for the protection of EAP staff, service providers and employers.

GOAL

To protect the EAP professional, the corporate client and the service provider.

OBJECTIVES

- To take the necessary precautions for addressing legal challenges concerning service delivery
- To sufficiently maintain financial resources to ensure continuation of the programme during and following litigation

MOTIVATION

Professional liability insurance protects the EAP profession.

CRITERIA

Obtain professional liability insurance from a credible, registered insurance provider.

GUIDELINES

- Individual EAP staff should bear responsibility for malpractice insurance
- Premiums preferably should be paid by employers
- Provision of liability must be included in the EAP policy and guidelines

2.4 ETHICS

2.4.1 ETHICAL BEHAVIOUR

STANDARD 12

EAP staff and providers must maintain the highest level of ethical conduct.

GOAL

Ensure that all EAP staff and providers consistently follow a set of principles, values, and conduct to safeguard the individual, organisation, and industry.

OBJECTIVES

- To ensure the protection of the client and organisation
- To always ensure ethical professional behaviour
- To ensure that EAP staff operate within the scope of their professional designation, registration and expertise

MOTIVATION

The helping professions, including EAPs, are governed by compliance protocols and legislative frameworks designed to protect both service users/clients and practitioners.

Given the significant impact of EAP work on service users/clients and stakeholders, it is essential to regulate conduct to ensure safety and prevent harm.

EAP staff and providers should include the **triple client focus** of the practice of EAP:

1. Benefit to the employee
2. Benefit to the leadership/team
3. Benefit to the organisation

CRITERIA

- EAP staff must have the necessary skills and knowledge relating to the philosophy and best practices
- Professional registration must be maintained
- All EAP staff should attend annual ethics refresher training

GUIDELINES

Members should use the EAPA-SA Code of Ethics and other relevant statutory requirements to practise ethical behaviour.

2.4.2 CONFIDENTIALITY AND DISCLOSURE OF INFORMATION

STANDARD 13

Confidentiality is the cornerstone of the profession and aligns with all professional standards, ethics, and legal requirements that regulate information management.

GOAL

To protect the privacy and rights of service users/clients as well as the integrity of the profession.

OBJECTIVES

- To protect the privacy of the individual employee
- To protect the integrity and credibility of the profession and the EAP
- To promote and protect the interests of all stakeholders

MOTIVATION

The EAP staff's professionalism and credibility depend on maintaining confidentiality.

CRITERIA

- Ensure processes are in place to maintain confidentiality protocols, as well as the disclosure of information.
- A policy position on confidentiality should be included in the EAP.
- Precautions should be taken to ensure that all communication involving confidential information is protected.

GUIDELINES

- Informed written consent is required in situations where confidential information has to be disclosed.

- Written consent must meet the following criteria:
 - Specify the information to be disclosed
 - Specify the person(s) to whom information will be disclosed
 - Purpose of the disclosure
 - Validity period
 - Signature of the employee
 - Signature of the EAP staff member
 - Statement of withdrawal
- In the case of a self-referral, feedback to outside parties can only be provided with informed written consent.
- In the case of formal referrals, disclosure is limited to:
 - Confirmation of attendance at EAP sessions
 - Level of cooperation with the treatment plan
 - Progress made during the intervention plan
 - Recommendations to the referring person(s)
- Confidentiality should not be confused with anonymity and should be clarified to all parties.
- In the case of compulsory information disclosure, the policy and SOP should specify confidentiality limits.

- The EAP policy should be aligned with the POPI Act and outline the consequences of breaches of confidentiality.

2.4.3 RECORD KEEPING

STANDARD 14

EAP staff must maintain records for oversight and governance purposes.

GOAL

To ensure proper and accurate administration for monitoring and evaluation of the EAP.

OBJECTIVES

To design and maintain a system that complies with best practice for capturing and maintaining the following:

- Administrative matters
- Documentation of meetings
- Clinical information
- Corporate client information
- Evaluation data
- Marketing and promotional material
- Training material
- Project/progress reports

MOTIVATION

- To enable monitoring and evaluation

- To ensure statutory compliance
- To ensure quality control

CRITERIA

- A system should capture records in either written and/or electronic form.
- Records should be relevant, regularly updated and accessible to stakeholders in a structured manner.

GUIDELINES

- Client clinical records should be managed confidentially and should be secured.
- Records should be retained for at least five (5) years and in accordance with legal requirements.
- The required backup and data security measures should be in place for all electronic records, i.e. application and use of passwords.

2.5 CLINICAL SERVICES

2.5.1 CRITICAL INCIDENT/TRAUMA MANAGEMENT

STANDARD 15

Critical incident/Trauma management is the process followed to mitigate potential harm resulting from a traumatic event.

GOAL

To respond to critical incident/s in line with best practice clinical guidelines and organisational policies.

OBJECTIVES

- To provide trauma-defusing services for the affected employees and support management immediately following the event
- To provide trauma-debriefing services in response to a traumatic incident in accordance with the clinical guidelines (48-72 hours following the event)
- To influence organisational policies and protocols relating to trauma management

MOTIVATION

- Timeously defusing and debriefing may lessen or prevent long-term difficulties or dysfunction at both the individual and organisational levels.

CRITERIA

- EAP staff should receive specialised training in trauma defusing and debriefing.
- EAP staff should ensure that all sections/departments of the organisation are briefed on the trauma management protocols.

GUIDELINES

Organisations should have a protocol in place that outlines relevant processes, such as a step-by-step procedure guide for identifying actions to be taken by staff, management, and employee assistance professionals during critical incidents.

2.5.2 CRISIS INTERVENTION

STANDARD 16

The EAP will offer interventions and services for individuals, family members, and organisations in crises, aimed at helping to regain/restore emotional stability through a short-term, focused approach.

GOAL

To mitigate the impact of crises by responding in a timely fashion consistent with organisational policies.

OBJECTIVES

- To contain and restore stability in a crisis
- To provide and create systems and processes for effective crisis management
- To ensure that EAP clients have access to crisis intervention and other appropriate professional services

MOTIVATION

- It is essential for the EAP to be able to respond effectively and timeously to crises to prevent complications and minimise the impact on the organisation.
- Timely intervention will lessen or prevent long-term difficulties or dysfunction at both the individual and organisational levels.

CRITERIA

- EAP staff should receive specialised training in crisis intervention.
- Information must be provided and communicated about the crisis services available.
- EAP staff should ensure that all sections/departments of the organisation are familiar with the procedure to be followed in a crisis.

GUIDELINES

- The EAP should have a crisis line to provide after-hours coverage.
- The EAP should establish protocols for crisis intervention.
- The EAP should design a step-by-step procedure that will identify actions to be taken by staff, management and EAP staff in a crisis.

2.5.3 CASE ASSESSMENT

STANDARD 17

EAP staff will conduct an assessment to identify problems experienced by employee/s or significant others, and this will inform the treatment or action plan.

GOAL

To identify and analyse the problem and develop an appropriate intervention plan.

OBJECTIVES

- To utilise assessment to identify, document and evaluate clients' strengths, difficulties and needs, which then informs the plan of action
- To ensure that the analysis focuses on both individual and organisational factors

MOTIVATION

- Proper analysis of the problem ensures timely and appropriate intervention.
- Accurate assessment will increase the likelihood of improved job performance and employee well-being.
- Competently conducted assessments will enhance the credibility of the EAP in the organisation.

CRITERIA

Assessments should include:

- the client's statement of the problem
- the precipitating event/s
- history of the problem
- mental status
- relevant family history
- level of risk to self or others
- effect on job performance
- corroborating data
- initial impression
- available support systems
- conclusion/recommendations

Organisational factors could include, amongst others, the following:

- harassment, bullying and other group dynamics
- organisational instability
- conflicts
- organisational transition and change.

GUIDELINES

- An intake interview and assessment should preferably be carried out using industry tools/instruments.
- When assessing a client, an employee assistance professional without specialised training in a specific field

should refer the client for further assessment.

- When long-term psychotherapy is indicated, referral to an alternative resource should be considered.

2.5.4 REFERRAL

STANDARD 18

Refer clients to an appropriate resource based on their unique needs revealed by the assessment.

GOAL

Matching the individual who has an identified problem with a cost-effective and appropriate level of care.

OBJECTIVES

- To ensure that clients gain access to appropriate resources and levels of care
- To utilise the services of outside resources, for possible referrals, when necessary

MOTIVATION

- Appropriate referrals should increase the likelihood of improved job performance and employee well-being
- Appropriate referral pathways are critical for effective case management

CRITERIA

- The employee assistance staff must explain to the client the reasons for the referral, as well as any costs the referral may incur
- The progress and outcome of referrals should be followed up by EAP staff
- The EAP should clarify referral procedures with external resources to which clients are referred.

See Annexure G – Supervisory referral form

See Annexure H - Intake form (voluntary or informal referral)

2.5.5 SHORT-TERM INTERVENTION

STANDARD 19

EAP professionals will provide short-term, solution-focused interventions to help people return to functioning.

GOAL

To get service users/clients back to functionality within the shortest period and in the most cost-effective manner.

OBJECTIVES

- To ensure that short-term intervention will consist of a predetermined maximum number of sessions

MOTIVATION

- The nature of the workplace context offers the ideal opportunity for time-limited interventions
- EAP staff should preferably provide short-term intervention services before referring the client to an outside resource
- Short-term intervention is rendered more cost-effectively

CRITERIA

- EAP staff should receive ongoing specialised training in the use of time-limited intervention models.
- A written action plan should be prepared for accomplishing specific objectives within an appropriate time period.
- Organisational policies should support short-term intervention services that are consistent with employee needs.

GUIDELINES

- The EAP staff contracts with the employee for the therapeutic process, which will be monitored to ensure progress. Four to six sessions may be considered, depending on the Company Policy and Operational Guidelines.
- EAP staff should work in a solution-focused, rather than problem-focused, way.

- EAP staff utilises homework to give the employee/ client practice in skills development.
- The intervention plan could include the identification and ranking of problems, the establishment of immediate and long-term goals and the designation of resources to be used.
- To develop a protocol for distinguishing between those cases appropriate for short-term intervention and those appropriate for referral to long-term intervention.

2.5.6 CASE MONITORING AND EVALUATION

STANDARD 20

The therapeutic process will be measured against the clinical goals that were set to ensure progress.

GOAL

To ensure quality of the clinical delivery of the services.

OBJECTIVES

- To ensure that the goals and objectives of the intervention plan are being met
- To enable the EAP staff to give appropriate feedback to the referring

manager/supervisor about the employee's progress

- To assist the EAP staff in tracking any deviation of treatment to yield the intended outcomes and make certain adjustments

MOTIVATION

- to ensure quality services and maintain the clinical integrity of the provision of services while meeting client/organisational needs.

CRITERIA

- Frequency of contact should be contracted with the employee client and the service provider during the treatment period.
- There should be follow-ups with the referring supervisor immediately after assessment and referral, and again when the intervention is complete.
- All monitoring activities should be documented in the client's EAP record for verification and evaluation.
- Supervision of EAP staff is critical for quality assurance of reports and adequate record-keeping.

GUIDELINES

The EAP staff should develop guidelines that effectively monitor the lifecycle of the case

management process which would include amongst others:

- matching client to counsellor
- develop an intervention plan
- follow-up by case manager
- clinical outcomes

2.5.7 AFTERCARE AND REINTEGRATION

STANDARD 21

The EAP will ensure that EAP clients receive aftercare and reintegration services.

GOAL

To provide aftercare and ensure effective reintegration (Return to Work = RTW) and continued well-being of employees after external long-term treatment interventions.

OBJECTIVES

- To monitor the intervention outcomes after the re-entry of an employee who has undergone treatment
- To assist the employee in reintegrating/ readjusting in the workplace following an intervention
- To assist the referred employee in maintaining and sustaining the outcomes of the longer-term intervention

MOTIVATION

- By providing ongoing aftercare services, the EAP demonstrates a commitment to maintaining the outcomes of an intervention and, by implication, the well-being of the organisation and its employees.

CRITERIA

- The organisation's EAP policy should describe the programme's aftercare and reintegration procedures and determine what constitutes the closure of a case.
- Follow-up should be conducted with the referring manager/supervisor after the employee's re-entry, to determine whether the intervention has had the desired effect on the employee's wellbeing and job performance and track the performance towards the goals.
- The EAP staff should determine whether there are any support or reasonable accommodations required in relation to the reintegration plan.

GUIDELINES

- EAP staff should provide support to the employee, team and leader;
- EAP staff should track progress of the reintegration plan and the recommendations of the long-term service provider;

- Where necessary, EAP staff must make recommendations to supervisors regarding reasonable accommodations, in line with the organisation's HR policy.

2.6 NON-CLINICAL SERVICES

2.6.1 ORGANISATIONAL CONSULTATION

STANDARD 22

EAP staff will provide advice and consultation to minimise behavioural risk and promote organisational effectiveness.

GOAL

To assist management in addressing the organisational issues which could impact on employee well-being and organisational effectiveness.

OBJECTIVES

- To align the EAP to business strategy to add value
- To be proactive and to partner with relevant stakeholders, in addressing strategies for minimising people-risk and organisational change events
- To positively influence the organisational climate and culture

MOTIVATION

- Consultation is one of the core technologies of the EAP and ensures that

the EAP functions as an integral part of an organisation.

- It offers a valuable perspective on wellbeing and behavioural risk which may emanate from external and internal developments and changes.

CRITERIA

EAP staff should:

- Provide business intelligence, such as: behavioural risk assessments, wellbeing and engagement, cost-benefit analyses, and the state of wellness.
- Study and report on the identified trends (internal and external) that influence organisational strategy.
- Report and comment on trends identified in EAP service-rendering and utilisation.
- Respond promptly to requests for EAP services to address organisational needs.

GUIDELINES

- EAP staff should provide reports and give regular feedback to management on the trends, behavioural risks and statistics identified during the EAP utilisation.
- EAP staff should alert and advise management on the possible impact on wellbeing during organisational changes and events.
- Management should consult EAP staff about envisaged changes, such as

retrenchment, restructuring, reorganising, preparation for retirement, life skills, and budgeting.

- EAP staff should integrate with other components of the Human Capital value chain to ensure a holistic assessment of organisational risks and changes.

2.6.2 EAP MANAGEMENT AND SUPERVISORY TRAINING

STANDARD 23

The EAP will use training as an intervention strategy for proactive outreach and to influence a culture of wellness.

GOAL

To provide training that enhances employee and organisational resilience.

OBJECTIVES

- To provide targeted interventions in response to commonly identified trends and business risks
- To build and strengthen individual and organisational skills and competencies
- To equip supervisors, management and labour representatives on meta skills (EQ, resilience, etc.) to create psychological safety
- To enhance the functioning of the EAP in the organisation.

MOTIVATION

Training is a core EAP tool to proactively address wellness and people-related matters.

Targeted training can address common issues affecting a population/team within the organisation.

See Annexure E – Formal Referral Form

CRITERIA

Regular EAP management training sessions should be conducted in a structured manner and should be relevant to the issues affecting a population/team within the organisation.

GUIDELINES

EAP staff should provide training on:

- The rationale of the EAP
- The EAP as a management support system
- The positive impact that the EAP could have on the organisation
- The link between the performance appraisal system and the EAP process
- Procedures for referring employees who are experiencing job-performance problems
- Proactive programmes according to identified risk areas, i.e. incapacity management, substance abuse, and life skills

- Capacity building to empower both employees and management
- Identifying the vulnerable employee

2.6.3 MARKETING

STANDARD 24

EAP staff will develop and implement an appropriate inclusive marketing strategy.

GOAL

To ensure the EAP is visible to encourage targeted service users/clients to utilise the programme, which ultimately supports the organisation's healthy functioning.

OBJECTIVES

- To ensure that programme promotion is on-going and directed at all levels of the organisation
- To market the programme so that everyone in the organisation would feel comfortable making use of the EAP
- To regularly inform employees about factors that influence their personal well-being and job performance, to increase their awareness in these areas

MOTIVATION

Marketing is a core component of the EAP and increases visibility of the programme, thereby encouraging use of the support services.

CRITERIA

The marketing strategy should be developed and reviewed on an ongoing basis to ensure its continued relevance and feasibility.

Target each population segment differently, based on needs, demographics, context, and environment.

GUIDELINES

- The marketing strategy should provide for a clear marketing plan and be aligned with the EAP strategy.
- The EAP should be marketed in employee-orientation programmes, company and union bulletin boards, newsletters and employee meetings.
- The marketing strategy should target all the levels of the organisation and should be adapted accordingly.
- EAP posters on topics of interest should be displayed for the employee population.
- Electronic media should be considered where appropriate and available, i.e.

emails, e-shots, electronic newsletters, and social media.

- Promotional material could be designed and distributed across all segments of the organisation.

2.7 PROACTIVE SERVICES

STANDARD 25

The EAP will develop holistic, proactive interventions.

GOAL

To ensure that Programmes are in place to mitigate employee behavioural and organisational risks.

OBJECTIVES

- To focus on the clinical and non-clinical components of the EAP
- To build and strengthen individual and organisational skills and competencies
- To enhance optimal wellness, individual resilience, strengthen teams and the organisation

MOTIVATION

Proactive services allow the EAP to address potential risks/challenges from a preventative perspective.

CRITERIA

- EAP staff should have sufficient knowledge of the organisation if they are to guide management on future challenges.
- Proactive services should be based on a comprehensive organisational risk assessment.

GUIDELINES:

- Proactive actions or Programmes should be aimed at different target groups and should respond to trends.
- Risk profiling should form the basis of preventive interventions.
- Proactive activities could include:
 - awareness campaigns
 - wellness days
 - posters
 - workshops, information sessions, seminars and training
 - HCTs and health-risk screening
 - culture, pulse and state-of-wellness surveys

2.8 STAKEHOLDER MANAGEMENT/NETWORKING

STANDARD 26

The EAP should network with various internal and external stakeholders to further EAP practice and outcomes.

GOAL

- To ensure that the EAP would partner with both internal stakeholders and external resources to respond to the needs of the work organisation, the employees and the family members in a cost-effective manner
- To enhance the knowledge, skills and attitude of EAP staff and to ensure that they are aware of new developments and technologies used in EAP service delivery

OBJECTIVES

- To identify key stakeholders to elicit buy-in and commitment to the EAP (e.g. Organisational Effectiveness, Human Capital, Occupational Health and Safety, etc.)
- To seek clarification of EAP boundaries and authority lines within the organisation to protect EAP neutrality and to facilitate teamwork
- To identify, select and evaluate external resources to support the EAP and assist employees in gaining access to these resources
- To develop service level agreements (SLA) and relationships, with relevant external stakeholders

- To ensure that the EAP staff attend regular CPD training for professional development
- To network with other EAP staff
- To identify all the relevant external structures that impact on EAP activities

MOTIVATION

- An effective network of professional resources, healthcare providers and self-help groups will ensure the delivery of quality services and more effective functionality of the programme.
- Internal collaboration will enhance the integration of all people projects, which will increase the effectiveness of the EAP function.
- Participation in professional organisations provides EAP staff with support and collegiality, which contributes to professional development.

CRITERIA

- The stakeholder mapping exercise should be extensive, providing a comprehensive list and needs to be maintained to ensure effective linkages.

- The effectiveness of stakeholder mapping will achieve the following:
 - the nature of the relationship
 - the benefits of the relationship
 - the frequency of interaction
 - the relevance of the stakeholder to the profession/programme

GUIDELINES

- Identify areas in the organisation that promote cooperation with the EAP.
- Identify external stakeholders that are critical to the organisational EAP strategy (e.g. professional associations, service providers, NGO's, etc.).

The EAP should secure:

- Community information and referral directories
- The names of private professionals
- Lists of mental health centres and treatment programmes
- Information on self-help centres providing services suited to the needs of EAP clients in the geographic areas served
- EAP staff periodically visit area service providers to gather current information

about facilities, available services, staffing and quality management.

- For internal stakeholders you should consider the following functions within the organisation that can support and promote the EAP function and strengthen integration for relevant points of access to EAP services. (e.g. OHS, OE, HR, etc.)
- For external stakeholders you should consider the following: regulatory, legislative, advocacy, health and wellness, financial, business and academic bodies.

2.9 MONITORING, EVALUATION AND REPORTING

STANDARD 27

The EAP's effectiveness should be continually monitored and evaluated to ensure the programme's value (ROI and/or ROV).

GOAL

To ensure that the EAP adds value (ROV and/or ROI) to the organisation and its beneficiaries. This will determine the EAP's impact.

OBJECTIVES

- To identify measures to be monitored as well as the relevant criteria
- To identify the different sources of information required for monitoring purposes
- To identify criteria for input, process, outcome and impact evaluation
- To identify the different sources of information required for evaluation purposes
- To develop and implement a strategy for monitoring and evaluation to ensure programme enhancement of the EAP
- To determine the return-on-investment (ROI) of the EAP
- To determine the return-on-value (ROV) of the EAP

MOTIVATION

Monitoring and evaluation are core components of the EAP, and resulting activities should be planned and executed accordingly.

Monitoring allows the organisation to judge the programme's progress and to identify the need for programme modifications. Evaluation allows the organisation to judge the EAP's usefulness and ROI. Monitoring and evaluation also allow for proactive planning.

CRITERIA

- A written monitoring and evaluation strategy directly related to the programme's goals and objectives, should be included in the programme design, policy and operational guidelines.
- A baseline study is to be carried out in the initial stage of EAP design and implementation, reflecting on both quantitative and qualitative data.
- Evaluation should include all the core technologies.
- Evaluation should be carried out scientifically with the ROI based on researched assumptions and statistical principles.

GUIDELINES

- Regular monitoring and evaluation must be conducted to determine whether goals and objectives are being met or whether there are any challenges.
- Results of process, outcome and impact of the EAP should be obtained and analysed to calculate the ROI to inform programme development.
- All role-players who could contribute to the monitoring and evaluation processes should be identified for involvement.
- Different types of data should be collected for programme evaluation,

such as design effectiveness, implementation, management and administration, completeness of the programme, direct services (i.e. counselling, marketing, training) and networking.

- Data should be identified for use during ROI and ROV calculations.
- Consider the utilisation of an external evaluator/consultant to maximise the objectivity of monitoring and evaluation procedures.

See Annexure I - EAPA-SA monitoring and evaluation checklist.

HISTORY AND BACKGROUND

The South African Branch of EAPA (EAPA-SA) was established and the first National Board elected in March 1996. At the first Board meeting, one of the agreed undertakings was:

The development of a South African document on standards for Employee Assistance Programmes, to be utilised by EAP professionals and EAP practitioners.

1. VERSION 1

1.1 PROCESS

A working committee comprising members from service providers and academic institutions was appointed in 1996. The committee informed all regional EAP interest groups of the process and invited them to submit comments. A brief information article was published in *People Dynamics in February 1998* to reach members who were not formal members of the regional interest groups. A final draft document was distributed to the EAPA-SA Board, the regional EAP interest groups and Social Work departments at various South African universities for comments.

1.2 ACKNOWLEDGEMENTS REGARDING THE 1999 EDITION

EAPA-SA is grateful for the contributions to this document, which is a testimony to the commitment and dedication of the members to their professional field.

A special word of thanks goes to the Centre for Human Development (Pty) Ltd. for

providing their infrastructure and administrative support during the compilation of the 1999 version of this document.

2. VERSION 2

2.1. FIRST REVISION OF THE DOCUMENT

At a Board Meeting on 27 May 2004, the Board appointed a task team to review and update the Standards for Employee Assistance Programmes in South Africa, based on learning and international best practices.

2.2. PROCESS OF REVISION

The team reviewed the literature and incorporated additional information into a draft document, which it circulated to the EAPA-SA Board members and the EAPA-SA Branches for comment. These comments were considered and appropriately incorporated into the final document.

3. VERSION 3

3.1 SECOND REVISION OF THE DOCUMENT

At a Board Meeting on 11 March 2009, the Board decided to appoint a task team to review and update the Standards for Employee Assistance Programmes in South Africa, based on learning and international best practices.

3.2. PROCESS OF REVISION

The team reviewed the literature and incorporated additional information into a draft document, which it circulated among

the EAPA-SA Board members and the EAPA-SA Branches for comment.

The draft document was presented on the 28th September 2009 at the AGM at the Sandton Convention Centre. A panel discussion followed the presentation.

The task group incorporated members' comments during the discussion into the final document.

The task group held follow-up sessions, followed by another round of distribution and requests for comments from the membership.

The task group displayed the draft document for comment on the EAPA-SA website. The task group incorporated all appropriate comments, and greatly appreciated the input.

The Board presented the final document during the AGM and Annual National Conference in Port Elizabeth, 21–23 September 2010.

The 3rd edition was finalised and released during the 2010/2011 Board's term of office. The Board acknowledges ICAS's financial support for printing **1000** copies of the final document.

4. VERSION 4

4.1. FOURTH REVISION

At a strategic planning meeting of the EAPA-SA Board during January 2014, the University of Pretoria and some master's students in EAPs were co-opted to revise the Standards document.

The Project Team thus consisted of staff and students from the Department of Social

Work and Criminology, University of Pretoria.

4.2. PROCESS OF REVISION

An online survey was carried out among registered individual EAPA-SA members during May-September 2014. Prof Terblanche and four master's students in EAPs developed the data collection instrument.

The online survey was distributed via email about the revision of EAPA-SA Standards, with two reminders. A link was provided to ensure anonymity and confidentiality.

Delegates at the EAPA-SA National Conference in Somerset West from 16 - 19 September 2014 participated in the survey and the provisional findings were presented at the Conference on 19 September 2014.

The Department of Statistics at the University of Pretoria assisted with a complete data analysis, and a draft report was prepared for the EAPA-SA Board to finalise the fourth draft of the EAP Standards.

A draft document was distributed to all EAPA-SA Chapters and registered EAP service providers for input.

The team incorporated final changes, and the EAPA-SA Board approved the document on 15 July 2015.

Old Mutual sponsored printing.

5. VERSION 5

5.1 FIFTH REVISION

The Standards Project Team preparing the fifth revision of the Standards document consists of the following members, all of whom are EAPA-SA Board members for the period 2023-2026.

- Ms. Radhi Vandayar - President
- Dr. Marion Borchers - President Elect
- Mr. Pogiso Mosadi - Governance
- Ms. Ayesha Malagas - Chairperson
Jacaranda Chapter
- Ms. Bontle Molefe - Chairperson
Free State Chapter
- Ms. Marata Komana - Chairperson
Limpopo Chapter
- Ms. Thiloshni Govender - Immediate
Past President

5.2. PROCESS OF REVISION

The process followed a consultative Masterclass at the EAPA-SA Eduweek in 2024. A Committee of Board members then convened 4 workshops to discuss all inputs. They also sought inputs from industry thought leaders. The Standards Committee then relayed the draft document back to all delegates at the EAPA-SA 2024 Eduweek, after which it finalised and incorporated the final inputs.

The following annexures are attached as described in the document:

EAPA-SA strives to enhance the EAP and wellness professions. To this end, these annexures are meant to be seen as an **EXAMPLE** or **TEMPLATE** and should not be seen as an official document prescribed by EAPA-SA.

ANNEXURE A: NEEDS ASSESSMENT TOOL

ANNEXURE B: ORGANISATIONAL PROFILE INSTRUMENT

ANNEXURE C: JOB DESCRIPTION: EMPLOYEE ASSISTANCE PROFESSIONAL

ANNEXURE D: JOB DESCRIPTION: EMPLOYEE ASSISTANCE PRACTITIONER

ANNEXURE E: JOB DESCRIPTION: EMPLOYEE ASSISTANCE COORDINATOR

ANNEXURE F: JOB DESCRIPTION: EMPLOYEE ASSISTANCE SPECIALIST

ANNEXURE G: FORMAL SUPERVISORY / MANAGERIAL EAP REFERRAL FORM

ANNEXURE H: INTAKE FORM (VOLUNTARY OR INFORMAL REFERRAL)

ANNEXURE I: EAP MONITORING AND EVALUATION CHECKLIST

NEEDS ASSESSMENT TOOL

Purpose of Needs Assessment Tool:

This needs assessment tool helps an organisation collect data that enables management to make an informed decision on the preferred Employee Assistance Programme (EAP) model for the organisation.

Instructions

- The Employee Assistance Service needs assessment should be performed periodically (e.g., every 2-3 years) and should include consideration of the items listed below.
- The information should be used only to determine the nature and format of the services to be included in the Employee Assistance Programme that is relevant and responsive to the needs of the organisation.

1. Organisation overview:

Name of organisation	
Type of services/ products	
Number of operational sites	
Years of existence	
Types of jobs	
Physical address	
Email address	
Telephone number of contact person	

Number of employees by location/sites	1.	2.
	3.	4.
	5.	6.
	7.	8.
	9.	10.

Number of NIGHT SHIFT employees by location/sites	1.	2.
	3.	4.
	5.	6.
	7.	8.

	9.	10.
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Demographic data on employee population	African:		
	Male	Female	Other
	White:		
	Male	Female	Other
	Coloured:		
	Male	Female	Other
	Indian:		
	Male	Female	Other
	Foreign nationals:		
	Male	Female	Other
	People with disability:		
	Male	Female	Other

2. Environmental scanning

Where does the organisation exist?	Urban area	Rural area
	Semi-urban	Semi-rural
The geographical location of the organisation	CBD	Outside CBD
What are the surrounding sectors?	Mining	Retail
	Game farms	Agricultural farms
	Schools	Hospitals
	Other (specify)	

3. Programme management:

Does the organisation have an existing Employee Assistance service?	Yes				No
EAP policy developed and available?	Yes				No
EAP strategy developed and available?	Yes				No
Operational Guidelines developed?	Yes				No
EAP staff available?	Yes				No
What other relevant programme(s) is/are available?	HIV & AIDS		OHS		
	Sports				
	Other (specify)				

4. Resources

Human resources available?	Yes/ No			
If yes, how many people are available?				
What material/physical resources are available? Please quantify.	Vehicle		Laptop	
	Offices		Desktop	
	Furniture		Stationery	
	Other (specify)			
Financial resources available?	Yes		No	
Has a budget been allocated to the programme?				
Is the allocated budget standalone, or is it combined with other programme budgets?				

5. Staffing

EAP staff available?	Yes/ No			
If yes, how many staff are available?				
What are their ranks/levels? Please quantify the levels.	Senior manager		Manager	
	Assistant manager		Admin officer	
	Admin clerk			
	Other (specify)			
What is their professional status?				
Please quantify.	Psychologist		Social worker	
	Occupational therapist		Physiotherapist	
	Occupational nurse		Medical practitioner	
	Chaplains			
	Other (specify)			

6. Factors affecting employee well-being/productivity

Environmental factors:	Noise		Pollution	
	Disaster		Waste	

	Other (specify).			
Occupational factors:				
	Injuries		Occupational diseases	
	Accidents		Workload	
	Grievances		Disciplinary	
	Other (specify)			
Social and psychological factors:	Marital stress		Depression	
Please tick where applicable.	Divorce		Financial stress	
	Racism		Alcoholism	
	Tribalism		Substance abuse	
	Harassment			
	Other (specify):			

7. Networks/Community resources:

Community service centres: Name and contact details (email address and telephone number)	Hospitals		Clinics	
	Other (specify)			
Faith-based organisations:				
	Other (specify)			
Non-governmental organisation:				
	Other (specify)			
Private organisations:	Doctors			

	Psychologists	
	Physiotherapists	
	EAP service providers	
	Other (specify)	

8. Specify any studies/surveys conducted in the recent past (e.g. Pulse, Climate and Culture Surveys, State of Wellness Surveys).

8.1 List the results of the mentioned study/studies.

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9. Specific needs and recommendations regarding the introduction of the Employee Assistance Programme and/or Wellness Programme:

9.1 Organised Labour's opinion:

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9.2 Supervisors' opinions:

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9.2 Managers' opinions:

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9.3 Top management’s opinions:

Thank you for taking part in the needs assessment process.

ORGANISATION PROFILE: INSTRUMENT

Purpose of the Instrument for organisational profile:

The organisational profile instrument is designed to provide data to help management make an informed decision on the design and implementation of an appropriate Employee Assistance Programme (EAP). The organisational profile reflects the following:

- The unique characteristics of the employer (company, organisation, department).
- The needs of the workforce.
- Preferences regarding the EAP envisaged.

Instruction

- Please answer questions by inserting $\sqrt{}$ to select a choice or provide the required written motivation.

Organisation Overview:

Name of organisation		
Type of services/products offered		
Number of operational sites		
Years in existence		
Physical address		
Email address:		
Telephone number:		
Number of employees by location/sites.	1.	2.
	3.	4.
	African	

	Male	Female	Other
	White:		
	Male	Female	Other

	Coloured:		
	Male	Female	Other
	Indian:		
	Male	Female	Other
	Foreign nationals:		
	Male	Female	Other
	People with disability:		
	Male	Female	Other

Environmental Scanning

Location of the workplace	Urban area	Rural area
	Semi-urban	Semi-rural
The geographical location of the Organisation	CBD	Outside CBD
What are the surrounding sectors?	Mining	Retail
	Game farms	Agricultural farms
	Schools	Hospitals
	Other (specify)	

1. Prevalence of personal problems in terms of potential trends

Indicate in the following table the prevalence of personal problems

Type of problem	Regarding yourself		Regarding colleagues		Regarding supervisor/manager	
	Yes	No	Yes	No	Yes	No

2. Employee Assistance Programme

Is there an existing Employee Assistance service in the organisation?	Yes				No
Does your employer have an EAP policy?	Yes				No
If yes, have you read the EAP policy?	Yes				No
EAP staff available?	Yes				No
What other relevant programme is available?	HIV & AIDS		OHS		
	Sports				
	Other (specify)				
Does your employer have a set of Operational Guidelines?	Yes				No

3. Resources:

Human resources available?	Yes				No
If yes to the above, how many people are available?					
What are the available material/physical resources?	Vehicle		Laptop		
	Offices		Desktop		
	Furniture		Stationery		
	Other (specify)				
Please quantify.					
Financial resources available?	Yes		No		
What is the budget allocated to the programme?					
Is the allocated budget stand-alone or combined with other programmes?					

4. Staffing

EAP staff available?	Yes		No	
If yes to the above, how many staff are available?				
What are their ranks/levels? Please quantify the levels.	Senior manager		Manager	
	Assistant manager		Administrative officer	
	Admin clerk		Cleaner	
	Messenger		Driver	
	Other (specify)			
What is their professional status?	Psychologist		Social worker	
	Occupational therapist		Physiotherapist	
Please quantify.	Occupational nurse		Medical practitioner	
	Chaplains			
	Other (specify)			

5. Factors affecting employee wellbeing/productivity.

Environmental factors.	Noise		Pollution	
	Disaster		Waste	
	Other (specify)			
Occupational factors.	Injuries		Occupational diseases	
	Accidents		Workload	
	Grievances		Disciplinary matters	
	Working night shift			
	Other (specify)			
Social and psychological factors.	Marital		Stress	
	Divorce		Depression	
	Racism		Financial	
	Tribalism		Alcoholism	

Please tick where applicable.	Harassment		Substance abuse	
	Other (please specify):			

6. Networks/Community resources:

Community service centres: (Name, email address and telephone numbers)	Hospitals		Clinics	
	Other (specify)			
Faith-based organisations:	Churches			
	Mosques			
	Synagogues			
	Other (specify)			
Non-Governmental Organisation:				
	Other (please specify):			
Private organisation:	Doctors			
	Psychologists			
	Physiotherapists			
	EAP service providers			
	Other (specify)			

7. Any studies/surveys conducted in the recent past (e.g. The prevalence of HIV in the workplace).

The results of the mentioned study/studies

The end

Job description
Employee Assistance Professional

1. Post details

Job title	Employee Assistance Professional
Purpose of post	e.g. To design, implement, administer and evaluate the Employee Assistance Services in the organisation/company/department.
Post level	e.g. Lower management, middle management, top management level.
Core objective	e.g. Management and general support for staff
Minimum qualification requirements	For example: ● 4-year Bachelor's degree (or equivalent, e.g. Honours), Short course training in EAPs, Advanced Short Course in EAPs ● Master's in EAP ● Minimum of 3 years' relevant work experience

2. Organisational context

Location of post	e.g. Head Office/Regional Office
Component	e.g. Employee Health and Wellness Unit
Post reports to:	e.g. Head of Department/Designated person
Posts reporting directly to this post	e.g. EAP practitioner/EAP administrative staff

3. Main objective

No.	Function	Activities
3.1	Design the Employee Assistance Programme (EAP) for the organisation	For example: ● Compile organisational profile. ● Conduct needs analysis. ● Establish an EAP advisory committee.
3.2	Implement the Employee Assistance Programme (EAP)	For example: ● Develop EAP policy to guide the implementation of the programme. ● Develop operational guidelines to support the policy. ● Develop EAP strategy and implementation plan.
3.3	Manage and administer the EAP	For example: ● Develop and regularly review the EAP generic service delivery standards.
3.4	Provide clinical services for the employees and their immediate families	For example: ● Provide trauma debriefing and emotional support for victims. ● Provide ongoing counselling and psychotherapeutic services for employees affected by both personal and work-related problems. ● Administer and manage EAP cases. ● Provide aftercare and monitoring services for employees (post-rehabilitation and other forms of therapy).
3.5	Provide non-clinical services	For example: ● Supervise the EAP co-ordinators and other support staff. ● Market EAP services internally. ● Train supervisors and/managers in EAP matters.
3.6	Provide preventative services	For example: ● Conduct proactive workshops i.e. life skills, team-building, stress management, personal and financial management, substance abuse, etc.

3.7	Monitor and evaluate the EAP	For example: ● Monitor the implementation of EAP services in the organisation. ● Coordinate/conduct research into issues about EAP and programme evaluation. - Conduct cost-benefit analysis and compile reports.
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4. Networking

CATEGORY	KEY CUSTOMERS	CUSTOMER REQUIREMENTS
4.1 Internal	Head of Department/Designated person	● Provide reports on the following: ● Progress report on the implementation of EAP ● Appointment of advisory committees ● Report on Impact studies on the implementation of EAP programmes
	District /Regional Offices	● Render advisory services for the proper implementation of EAP ● Monitor and evaluate the implementation of EAP ● Provide progress report on EAP ● Supervision of EAP practitioners
	Staff in the organisation	● Provide information on the following: ● EAP progress report and standards ● EAP awareness programmes ● Ongoing counselling and support ● EAP policy awareness
4.2 External	Other Government departments	For example: ● DPSA, Office of the Premier, Department of Labour, and Department of Health and Social Development;
	Professional services	● Community service centres (e.g. hospitals, clinics) ● Faith-based organisations ● Non-governmental organisations ● Private organisations (e.g. doctors, psychologists) ● External EAP service providers

5. Responsibilities

Area	Facet	Description
Human resources	Number of staff managed directly.	State the number of EAP Practitioners. State the number of EAP administrative staff.
Financial resources	Size of budget managed indirectly.	Insert budget value.
Material resources	Value of equipment managed.	Insert resource value.

6. Equipment generally used

Item	Required (Yes/No)	Description	Quantity
Laptop			
Vehicle			
Overhead data projector			
Video cassette and television set			
Other Items (specify)			

7. Job Competencies

Knowledge	Skills	Personal attributes	Learning field	Learning indicator
Employee Assistance Programme (EAP)	Verbal and written communication skills Counselling skills Facilitation skills Listening skills Problem-solving skills Presentation skills Coordination and monitoring skills Computer skills Report-writing skills Supervisory skills	Self-confidence Assertiveness Creativity Integrity Professionalism. Empathy Flexibility	Strategic management Financial management and budgeting Project management	Minimum requirements: Tertiary qualification in Social Sciences (i.e. B Social Work, Hons in Psychology, B Cur, and in-service training courses) Recommended qualifications: Masters in EAP or equivalent
Compensation for occupational injuries and diseases (COID)				
HIV and AIDS				
HR policies and procedures				
Research and evaluation processes and procedures				
Team building				
Financial management				
Occupational Health and Safety (OHS)				
Conflict management.				

8. Working conditions

Exposure to danger	e.g. Exposed to road accidents as a result of travelling long distances to district offices.
Exposure to climatic extremes	e.g. Extensive driving and long travel hours to hot climatic areas.
Exposure to hostile encounters	e.g. Troubled employees who are emotionally unstable and could become hostile.
Exposure to legal risk	e.g. Any infringement of client's constitutional rights when handling EAP, HIV and AIDS cases may lead to legal suits. Non-compliance with legislation may result in a fine or imprisonment, e.g., disclosing confidential information obtained during the consultation without express written consent.
Uncomfortable working conditions	e.g. Sometimes render standby duties after normal working hours with the possibility of attending calls at night/coming home late.

9. Career pathing

Progression/Promotion to the next higher salary range/post level

Next higher post	e.g. Director - EAP
Conditions of progression	e.g. Availability of a vacant post.
Conditions of promotion	e.g. Appointment after interview or upgrading of post after job evaluation.

10. Job description agreement

Post holder’s surname and initials

Supervisor’s surname and initials

Post holder’s signature

Supervisor’s signature

Date

Date

Job description
Employee Assistance Practitioner

1. Post details

Job title	Employee Assistance Practitioner
Purpose of post	To coordinate EAP-related tasks.
Post level	e.g. Entry level, or lower management level.
Core objective	e.g. To manage and generally support EAP core functions.
Minimum qualification requirements	e.g. Matric certificate plus a 3-year Bachelor's degree (or equivalent), Short course training in EAPs.

2. Organisational context

Location of post	e.g. Head office/ Regional office
Component	e.g. Employee Health and Wellness Unit
Post reports to:	e.g. Employee Assistance Professional (Manager/Director)
The following posts report directly to this post	Dependent on organisational structure.

3. Main objective

No.	Function	Activities
3.1	To coordinate the EAP design in the organisation/company/department.	For example: ● Facilitate the compilation of organisational profiling. ● Facilitate the establishment of an advisory committee. ● Coordinate the implementation of regular needs assessment.
3.2	To coordinate EAP implementation actions	For example: ● Implement Employee Assistance and Wellness Programmes in the organisation. ● Assist with the development of EAP policies. ● Develop implementation and operational plans. ● Develop operational guidelines in support of the policy.
3.3	To coordinate the administrative functions of the EAP	For example: ● Establish sound EAP record-management systems. ● Conduct general administrative tasks (typing, faxing and filing).
3.4	To coordinate actions resulting from the clinical services rendered to employees	For example: ● To render initial assessment. ● To refer EAP cases to internal and external professionals. ● To maintain high confidentiality of all EAP records.
3.5	To coordinate actions resulting from non-clinical services	For example: ● To conduct EAP supervisory training. ● Market EAP services in the organisation. ● Assist with the training of supervisors, managers and organised labours.
3.6	To coordinate actions resulting from preventative services	For example: ● Conduct EAP workshops (e.g. financial management, life skills, stress management and substance abuse). ● Coordinate team-building interventions.

3.7	To coordinate actions resulting from monitoring and evaluating EAP services	For example: ● Facilitate the implementation of cost-benefit analysis. ● Coordinate the implementation of impact studies. ● Compile monthly/ quarterly and annual M&E reports.
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4. Networking

CATEGORY	KEY CUSTOMERS	CUSTOMER REQUIREMENTS
4.1 Internal	Head of Department/Designated person	Provide reports on the following: - Progress report on the implementation of EAP. - Appointment of advisory committees. - Report on Impact studies regarding the implementation of EAP programmes.
	District /Regional Offices	- Render advisory services regarding the proper implementation of EAP. - Monitor and evaluate the implementation of EAP. - Provide progress reports on EAP. - Supervision of EAP practitioners.
	Staff in the organisation	- Provide information on the following: - EAP progress report and standards. - EAP awareness programmes. - Ongoing counselling and support. - EAP policy awareness.
4.2 External	Other Government departments	For example: DPSA, Office of the Premier, Department of Labour, and Department of Health and Social Development.
	Professional services	- Community service centres (e.g. hospitals, clinics); - Faith-based organisations; - Non-governmental organisations; - Private organisations (e.g. doctors, psychologists); - External EAP service providers.

5. Responsibilities

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Area	Facet	Description
Human resources	Number of staff managed directly.	Insert number of staff managed.
Financial resources	Size of budget managed indirectly.	Insert budget value.
Material resources	Value of equipment managed.	Insert resource value.

6. Equipment generally used

Item	Required (Yes/No)	Description	Quantity
Laptop			
Overhead data projector			
Vehicle			
Video cassettes and television set			
Other items (specify):			

7. Job competencies

Knowledge	Skills	Personal attribute	Learning field	Learning indicator
Employee Assistance Programme (EAP)	Verbal and written communication skills	Self-confidence Assertiveness Creativity Integrity Professionalism Empathy Flexibility	Financial management and budgeting.	Tertiary qualification in Social Sciences and in-service training courses (BA Degree in Social Science)
Occupational Health and Safety (OHS)	Planning and organising skills			
Compensation for occupational injuries and diseases (COID)	Facilitation skills			
	Listening skills		Project management	
HIV and AIDS	Problem-solving skills			
HR policies and procedures	Presentation skills			
Research and evaluation processes and procedures	Coordination and monitoring skills		Programme management	
	Computer skills			
Team building	Report-writing skills			

Financial management				
Conflict management				

8. Working conditions

Exposure to danger	e.g. Exposed to road accidents as a result of traveling to district offices.
Exposure to climatic extremes	e.g. Extensive driving and long travel hours to hot areas.
Exposure to hostile encounters	e.g. Troubled employees who are emotionally unstable could become volatile.
Exposure to legal risk	e.g. Any infringement of client's constitutional rights when handling HIV positive and occupational injuries and diseases cases may lead to legal suits. Non-compliance with legislation may result in a fine or imprisonment, e.g., disclosure of confidential information without the client's express written consent.
Uncomfortable working conditions	For example: • Sometimes fulfil standby duties after normal working hours with the possibility of attending calls at night/coming home late. • Long hours of driving to attend EAP cases.

9. Career pathing

Progression/Promotion to the next higher salary range post level

Next higher post	e.g. EAP - Professional (Manager/Director).
Conditions of progression	e.g. Availability of a vacant post/Further studies.
Conditions of promotion	e.g. Appointment after interview or upgrading of post after job evaluation.

10. Job description agreement

Post holder’s surname and initials

Supervisor’s surname and initials

Post holder’s signature

Supervisor’s signature

Date

Date

Job description**Employee Assistance Coordinator****1. Post details**

Job title	Employee Assistance Coordinator
Purpose of post	To administer and coordinate the EAP Programme
Post level	Entry level or lower management level.
Core objective	To generally support EAP core functions.
Minimum qualification requirements	Matric certificate plus a 3-year Bachelor's degree (or equivalent), Short course training in EAPs.

2. Organisational context

Location of post	Head office/Regional office
Component	Employee Health and Wellness Unit
Post reports to:	Employee Assistance Professional (Manager/Director)
The following posts report directly to this post	Dependent on organisational structure

3. Main objective

No.	Function	Activities
3.1	Programme Administration and Coordination of the EAP design in the organisation/company/ department	• Coordinate and manage the day-to-day operations of the Employee Assistance Programme. • Serve as the primary point of contact for employees seeking assistance through the EAP. • Maintain confidential records and ensure compliance with privacy and confidentiality standards. • Develop and update EAP policies, procedures, and resources as needed. • Facilitate the compilation of organisational profiling. • Facilitate the establishment of an advisory committee.
3.2	Coordinate EAP implementation actions and plans	• Implement Employee Assistance and Wellness Programmes in the organisation. • Assist with the development of EAP policies. • Develop implementation and operational plans. • Develop operational guidelines in support of the policy.

3.3	Employee Support: Coordinate non-clinical services	• Provide initial consultation and assessment for employees seeking EAP services. • Offer support and crisis intervention to employees. • Facilitate referrals to internal and external resources, including mental health professionals, financial advisors, and legal services. • Follow up with employees to ensure effective use of EAP resources and services
3.4	Programme Promotion and Education: Coordinate Preventative services	• Develop and implement strategies to promote the EAP programme and its benefits to employees. • Conduct training sessions, workshops, and informational seminars to educate employees about EAP services. • Collaborate with other departments to integrate EAP services into company wellness programmes • Coordinate team-building interventions.
3.5	Data Management and Reporting	• Monitor and analyse programme utilisation and effectiveness, preparing regular reports for management. • Identify trends in employee needs and recommend improvements to the EAP programme. • Maintain accurate documentation of EAP activities and outcomes.

3.6	Collaboration and Partnerships	● Liaise with external EAP providers and ensure the quality of services offered to employees. ● Work with HR and management to address employee relations issues and provide appropriate support. ● Build relationships with community organisations and resources to enhance the EAP programme.
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4. Networking

CATEGORY	KEY CUSTOMERS	CUSTOMER REQUIREMENTS
4.1 Internal	Designated person	Provide reports on the following: • Progress report on the implementation of EAP • Appointment of advisory committee
	District /Regional Offices	• Render advisory services regarding the proper implementation of EAP • Support the implementation of EAP • Provide progress report on EAP
	Staff in the organisation	• Provide information on the following: • EAP progress report and standards • EAP awareness programmes • Short-term counselling and support • Crisis intervention services • EAP policy awareness
4.2 External	Other Government departments	Office of the Premier, Department of Labour, and Department of Health and Social Development.
	Professional services	• Community service centres (e.g. hospitals, clinics) • Faith-based organisations • Non-governmental organisations • Private organisations (e.g. doctors, psychologists) • External EAP service providers

5. Responsibilities

Area	Facet	Description
Human resources	Number of staff managed directly.	Insert number of staff managed.
Financial resources	Size of budget managed indirectly.	Insert budget value.
Material resources	Value of equipment managed.	Insert resource value.

6. Equipment generally used

Item	Required (Yes/No)	Description	Quantity
Laptop			
Overhead data projector			
Vehicle			
Video cassettes and television set			
Other Items (specify):			

7. Job competencies

Knowledge	Skills	Personal attribute	Learning field	Learning indicator
Employee Assistance Programme (EAP)	Verbal and written communication skills	Self-confidence	Financial management and budgeting.	Tertiary qualification in Social Sciences and in-service training courses (BA Degree in Social Science)
Occupational Health and Safety (OHS)	Planning and organising skills	Assertiveness	Project management	
Compensation for occupational injuries and diseases (COID)	Facilitation skills	Creativity	Programme management	
HIV and AIDS	Listening skills	Integrity		
HR policies and procedures	Problem-solving skills	Professionalism		
Research and evaluation processes and procedures	Presentation skills	Empathy		
Team building	Coordination and monitoring skills	Flexibility		
	Computer skills			
	Report-writing skills			

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Financial management				
Conflict management				

8. Working conditions

Exposure to danger	Exposed to road accidents as a result of travelling to district offices.
Exposure to climatic extremes	Extensive driving and long hours of travel to hot areas.
Exposure to hostile encounters	Troubled employees who are emotionally unstable could become volatile.
Uncomfortable working conditions	• Sometimes fulfil standby duties after normal working hours with the possibility of attending calls at night/coming home late. • Long hours of driving to attend EAP cases.

9. Career pathing

Progression/Promotion to the next higher salary range post level

Next higher post	EAP- Professional (Manager/Director).
Conditions of progression	Availability of a vacant post/Further studies.
Conditions of promotion	Appointment after interview or upgrading of post after job evaluation.

11. Job description agreement

Post holder’s surname and initials

Supervisor’s surname and initials

Post holder’s signature

Supervisor’s signature

Date

Date

Job description
EAP Specialist

Employee Assistance Specialist

1. Post details

Job title	Employee Assistance Specialist
Purpose of post	Strategic alignment of the Employee Assistance Programme with the Organisation/company/departmental vision, goals and objectives.
Post level	Middle and/or Top Management level.
Core objective	Management, Monitoring and Evaluation of the Programme
Minimum qualification requirements	● 4-year Bachelor's degree (or equivalent, e.g. Honours), Short course training in EAPs, Advanced Short Course in EAPs and ● Master's or Doctorate Degree in EAP ● Minimum of 5 years' relevant work experience

2. Organisational context

Location of post	Head Office/Regional Office
Component	Organisational Human Resource Development Directorate (OHRD) or Employee Health and Wellness Unit
Post reports to:	Head of Department/Designated person
Posts reporting directly to this post	EAP Professional and EAP Practitioner

3. Main objective

No.	Function	Activities
3.1	Strategic management Data Management and Reporting	• Develop Annual Performance Plan for the EAP and align it with the Company's/ Organisational Strategy • Develop Operational Plans for the EAP • Compile Specification/ tender for outsourcing EAP Services • Collect, analyse, and report on data related to EAP utilisation and outcomes. • Provide regular reports to management on EAP activities, trends, and areas for improvement. • Advocate and ensure budget allocation for EAP • Make representation of EAP to the Top Management
3.2	Collaboration, Networking and Stakeholder Involvement	• Build and maintain relationships with external EAP providers, mental health professionals, and community resources. • Work closely with HR, management, and other departments to ensure the EAP is effectively integrated into the organisation's overall employee wellness strategy. • Marketing EAP services to internal and external stakeholders • Establish and maintain stakeholder relations
3.3	EAP Programme Management Design	• Develop, implement, and manage the EAP, ensuring it aligns with organisational goals and employee needs. • Monitor and evaluate the effectiveness of EAP services, using data to make improvements. • Maintain up-to-date records of all employee interactions and ensure compliance with confidentiality and data protection regulations • Compile organisational profile. • Conduct needs analysis • Chairperson of the EAP advisory committee.

3.4	Implement the Employee Assistance Programme (EAP)	● Ensure EAP policies are developed to guide the implementation of the programme. ● Ensure operational plans are developed to support the policy. ● Develop EAP strategy and implementation plan.
3.5	Manage and administer the EAP	● Conduct Monitoring and Evaluation of the EAP ● Review the EAP performance and service delivery standards. ● Conduct cost benefit analysis and compile report ● Coordinate/conduct research into issues about EAP and programme evaluation
3.6	Provide clinical services for the employees and their immediate families	● Provide confidential counselling to employees on a wide range of personal, family, and work-related issues. ● Offer short-term, solution-focused interventions and refer employees to external resources when necessary. ● Conduct assessments to understand employees' needs and provide appropriate support or referrals
3.7	Provide non-clinical services and Promotional Activities	● Supervise the EAP employees ● Promote the EAP services through various communication channels, including newsletters, emails, posters, and intranet. ● Collaborate with the HR department and other stakeholders to raise awareness about the EAP and its benefits
3.8	Training and Education: Provide preventative services	● Conduct research to keep up to date with new development in the field ● Conduct workshops, seminars, and training sessions on topics such as stress management, work-life balance, conflict resolution, and mental health awareness. ● Conduct supervisory training to educate managers and supervisors on how to recognise signs of distress in employees and how to refer them to the EAP.

4.

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Networking

CATEGORY	KEY CUSTOMERS	CUSTOMER REQUIREMENTS
4.1 Internal	Head of Department/Designated person	• Provide reports on the following: • Progress report on the implementation of EAP • Appointment of advisory committees • Report on Impact studies on the implementation of EAP programmes;
	District/Regional Offices	• Render advisory services for the proper implementation of EAP • Monitor and evaluate the implementation of EAP • Provide progress report on EAP • Supervision of EAP employees
	Staff in the organisation	• Provide information on the following: • EAP progress report and standards • EAP awareness programmes • Ongoing counselling and support • EAP policy awareness
4.2 External	Other Government departments	• DPSA, Office of the Premier, Department of Labour, and Department of Health and Social Development; Government Provincial Departments
	Professional services	• Community service centres (e.g. hospitals, clinics) • Faith-based organisations • Non-governmental organisations • Private organisations (e.g. doctors, psychologists) • External EAP service providers

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5. Responsibilities

Area	Facet	Description
Human resources	Number of staff managed directly.	<i>State the number of EAP employees.</i> <i>State the number of EAP administrative staff.</i>
Financial resources	Size of budget managed directly.	>R1M
Material resources	Value of equipment managed.	<i>Insert resource value.</i>

6. Equipment generally used

Item	Required (Yes/No)	Description	Quantity
Laptop	X		
Vehicle	X		
Overhead data projector.	X		
Television set	X		
Other Items (specify) Recorder/ Audio visual equipment	X		

7. Job Competencies

Knowledge	Skills	Personal attributes	Learning field	Learning indicator
Employee Assistance Programme (EAP)	Verbal and written communication skills	Self-confidence	Strategic management	Minimum requirements: Tertiary qualifications: Masters or Doctorate in EAP or equivalent
Compensation for occupational injuries and diseases (COID)	Counselling skills	Assertiveness	Financial management and budgeting	
	Facilitation skills	Creativity	Project management	
	Listening skills	Integrity		
	HIV and AIDS	Problem-solving skills		
HR policies and procedures	Presentation skills	Empathy		
		Flexibility		
Research and evaluation processes and procedures	Coordination and monitoring skills	Independence		
	Computer skills			
Team building	Report-writing skills			
	Supervisory skills			

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Financial management	Cultural competency			
Occupational Health and Safety (OHS)				
Conflict management				

8. Working conditions

Exposure to danger	Exposed to road accidents as a result of travelling long distances to district offices.
Exposure to hostile encounters	Troubled employees who are emotionally unstable and could become hostile.
Exposure to legal risk	Any infringement of a client's constitutional rights when handling EAP, HIV and AIDS cases may lead to legal suits. Non-compliance with legislation may result in a fine or imprisonment, e.g., disclosing confidential information obtained during the consultation without express written consent.
Working conditions	Typically works in an office setting, but may need to travel for training, workshops, or emergency support. May require flexible hours to accommodate employee needs or crises

9. Career pathing

Progression/Promotion to the next higher salary range/post level

Next higher post	Director - EAP or Chief Director
Conditions of progression	Availability of a vacant post.
Conditions of promotion	Appointment after interview or upgrading of post after job evaluation.

10. Job description agreement

Post holder's surname and initials

Post holder's signature

Date

Supervisor's surname and initials

Supervisor's signature

Date

Formal Referral Form

Purpose:

To ensure the line manager provides the necessary information to refer the employee to the EAP.

Instructions:

- The line manager should complete this form.
- The employee should consent to this referral.
- This form should not be used in a disciplinary process and should rather be used as a supportive tool.

Employee's name:		Personnel no:	
Occupation/Job title:		Salary/Grade level:	
Workstation:		Number of years/months of employment:	
Division/Unit/ Component:		Employee's tel. number:	
Referring supervisor/manager's name:		Referring supervisor/manager's tel. number:	

1. Briefly state the reason(s) for the referral:

- 2. List the behavioural indicators you have observed in the employee (Use the checklist attached):**

- 3. For how long have you been aware of the incidents or behaviours mentioned in the checklist?**

- 4. What corrective actions have been taken to solve the problem(s), if any?
(e.g. disciplinary action, warnings, counselling)**

- 5. If the EAP interventions were to be successful, what should be the desired improvements/changes?**

6. Mention anything positive about the employee that would be helpful during treatment to improve performance.

7. Point out anything that could hinder the success of the EAP intervention.

Supervisor's/Manager's signature

Date

The employee’s intention to participate in the programme cannot be processed without their signature and a “Yes” indication below.

I understand that my line manager is referring me to the Employee Assistance Programme (EAP) and I confirm that the contents of this form were discussed with me.

- ☐ **YES, I will participate in the Employee Assistance Programme.**
- ☐ **NO, I do not wish to participate in the Employee Assistance Programme.**

Employee’s signature	Date
EAP Professional/Practitioner:	
Date received:	

Checklist for Line Managers

Please complete the list below by checking the appropriate box(es), providing any additional information in the comments section.

Absenteeism

DESCRIPTION	YES/NO	COMMENT
Excessive absenteeism		
Number of days absent in past 12 months		
Is there a noticeable pattern? (e.g. Mondays, Fridays, after paydays, before or after holidays or long weekends)		
Excessive lateness		
Period that this has been observed		
Frequently leaves the workplace/area		
Unusual excuses for absences		
Leaves work early		
Multiple instances of unauthorised leave		
Frequently sick		
Frequently sick on duty		
Other (specify)		

Job performance

DESCRIPTION	YES/NO	COMMENT
Lowered quality of work in comparison with earlier performance		
Decrease in quantity of work output		
Increase in number of errors or mistakes		
Impaired judgement		
Inability to concentrate		
Frequent accidents on the job		
Job requires more time or effort to complete than expected		
DESCRIPTION	YES/NO	COMMENT
Failure to meet deadlines or schedules		
Decline in ability to manage complex tasks		
Lack of consistency in work pattern		
Other (specify)		

Behaviour

DESCRIPTION	YES/NO	COMMENT
Avoids supervisor/co-workers		
Deterioration in personal appearance		
Less communicative at work		
Loss of interest		
Unusually critical of supervisor/co-workers/employer		
Inability to accept constructive criticism and advice from co-workers or supervisor		
Wastes resources		
Disregard for safety (poor safety record)		
Frequent mood swings		
Aggressive behaviour		
DESCRIPTION	YES/NO	COMMENT
Insubordination		
Suicidal ideation or thoughts		
Domestic violence victim		
Criminal behaviour		
Substance abuse at work		
Under the influence of drugs and/or alcohol		
Other (specify)		

Inability to cope following an extended period of bereavement or grief (e.g. Loss of spouse, child, parent, grandparent, siblings)

Describe the nature of the event and resulting indicators of affected behaviour.

Inability to cope following a traumatic event or incident (e.g. car accident, disaster, armed robbery, shooting, hijack, kidnapping, death)

Describe the nature of the event and resulting indicators of affected behaviour:

Inability to cope following an injury on duty

Describe the nature of the event and resulting indicators of affected behaviour.

Substance abuse at work (alcohol, drugs, etc.)

Describe the event and list the events, if there was more than one incident observed:

Would you like training on how to identify and refer a troubled employee? Yes ☐ No ☐

If yes, please contact the EAP office.

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Intake form (self or informal referral)

This form is for completion by EAP staff in the organisation.

The purpose of the intake form is to ensure that all crucial information is obtained and available at the onset of the treatment process

1. Personal details of referred employee:

Date of referral:	
Personnel/Personal/Staff number (if applicable):	
Rank/Title:	
Initials and surname:	
First name:	
Telephone number (home):	
Cell phone number:	

2. Details of work environment:

Station:	
Position:	
Telephone number (work):	
Email:	

3. Details of referral

3.1 Type of referral:

☐ Self-referral ☐ Informal

3.2 Short description of presenting problem(s):

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3.3 Referred employee’s expectations of counselling and/or support services.

3.4 Details of previous counselling and/or support services received.

3.5 Plan of action:

Name of EAP staff member

Signature of EAP staff member

EAP Monitoring and Evaluation Checklist**Purpose:**

The purpose of this checklist is to ensure proper monitoring and evaluation will take place

Instructions

- This instrument is specifically designed to monitor and evaluate the implementation of the Employee Assistance Programme in the corporate client, in accordance with the required EAPA-SA Standards.
- It is important to monitor and evaluate the EAP continuously to identify areas of concern and ultimately improve service delivery and consider possible enhancements.
- You are hereby requested to provide all of the necessary information and documentation.
- Should an external provider conduct this, POPIA and confidentiality should be maintained.

Department/Organisation: _____

Workstation: _____

Date of monitoring: _____

Employee Assistance Programme

Standard item #:	Element	Yes/No	Observation	Recommendations/Comments
1.	Programme design:			
	Advisory committee available and functioning			
	Minutes and attendance registers are kept			
	Organisational profiling conducted (report available)			
	Needs assessment done (report available)			
	Surveys conducted			
	Determination of service delivery models (internal, external or combined) conducted			
	Operating procedures developed			
	Programme costing conducted.			
	EAP policy developed and available			
	Date of last review of policy			

Standard item #:	Element	Yes/No	Observation	Recommendations/ Comments
2.	Programme implementation:			
	Operational guidelines developed and available			
	Implementation plan available			
3.	Management and administration.			
	Qualified EAP staff available			
	Staffing criteria followed			
	Appropriate educational qualification displayed			
	EAP staff registered with statutory councils (e.g. HPCSA, SACSSP, SANC)			
	Professional supervision conducted (Add details, i.e. plan and by whom)			
	Continuous professional development plan available and followed			
	Confidentiality and professionalism demonstrated in individual conduct and office ethos			
	Proper record-keeping followed			
Standard item #:	Element	Yes/No	Observation	Recommendations/ Comments
	Minimum standards in securing clinical and confidential information developed and available			
	Lockable safe for securing documents available			
	Electronic data secured with the use of password			
	Professional liability insurance secured and premiums paid-up			
	EAP practitioners and professionals have access to EAPA-SA Code of Ethics and other relevant professional bodies			
4.	Clinical services:			
	Trauma management programme, such as debriefing and defusing is offered			
	Crisis Intervention services available			
	Assessments are conducted and records are available			
	Assessment tools and protocols developed and used			
	Referrals are conducted and records are available			
	Referral tools and protocols developed and utilised			

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	Short-term intervention services available and offered			
	Short-term interventions follow a specific plan of action			
Standard item #:	Element	Yes/No	Observation	Recommendations/Comments
	Case monitoring and evaluation are conducted			
	Case monitoring and evaluation follow a specific plan of action			
	Aftercare and reintegration services offered			
	Aftercare and reintegration plan developed and available			
	Referrals to external resources (provide detail)			

5.	Non-clinical services			
	Organisational consultation services offered			
	EAP training provided for the line managers			
	EAP training provided for the organised labour			
	EAP training provided for the relevant stakeholders			
	Training attendance registers available			
	EAP services are marketed in the organisation			
	EAP marketing strategy developed and available			
	Marketing material available (brochures, pamphlets, posters and other relevant promotional materials)			
	Frequency of updating of training material			
	State numbers trained per stakeholder category			
Standard item #:	Element	Yes/No	Observation	Recommendations/Comments
	Briefly describe nature of training provided			
	Briefly describe curriculum contents of training provided			

6.	Proactive services			
	Preventative services are available and are offered (awareness, wellness days, posters, workshops, i.e. life skills, information sessions, seminars, training, HCT and health-risk screening)			
	Attendance registers and material distribution records kept			
	Risk assessment and profiling conducted and report compiled			
7.	Stakeholder management/Networking			
	Networking conducted			

	List of relevant networks compiled and available			
	Internal and external resources identified			
	EAP practitioners and professionals actively participate in EAP-related structures and sub-structures			
8.	Monitoring and evaluation			
	Previous programme monitoring and evaluation conducted. (Provide details, i.e. methodology and results)			
Standard item #:	Element	Yes/No	Observation	Recommendations/ Comments
	Monitoring and evaluation strategy developed and available			
	Previous cost-benefit analysis conducted and report available			
	Previous impact assessment study conducted and report available (Provide details, i.e. methodology and results)			
9.	Reporting (at periodic intervals).			
	Report on successes (Stipulate/comment on criteria applied)			
	Report on challenges (Stipulate/comment on such challenges)			

COMMENTS:

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RATINGS:

- ☐ Programme does not meet the required standard.
- ☐ Programme partially meets the required standard.
- ☐ Programme meets the required standard.
- ☐ Programme satisfactorily meets the required standard.
- ☐ Programme meets the required standard excellently/ outstandingly.

EAP coordinator/practitioner/professional/specialist:	EAP section head:
Name:	Name:
Signature:	Signature:
Date:	Date:

CLICKS GROUP

L I M I T E D
