

Utilizing a Needs Assessment Process at the United Way of Broome County



Jennifer Strange
Binghamton University

Faculty Advisor: Dr. Pam Mischen Site Supervisor: Phill Ginter



Introduction & Aim

This project intends to:

- Explore the Working Bridges™ and other employee assistance programs
- Provide needs assessment process guidelines for the United Way of Broome County

The United Way of Broome County

Mission: “To drive change that will have positive impact on the critical needs of our community by strategically leveraging the collective resources of community partners” (“Our Mission”, 2016).

Education
Income
Health

Working Bridges™

Mission: “Uses the workplace as a platform for services designed to help workers minimize work disruptions, decrease absenteeism, improve financial stability, and ultimately increase retention and advancement.” (Giuffrida, 2015).

Employer Work Groups
Resource Coordinators
Income Advance Loans
Financial Education, Health, & Wellness
Workshops
On-Site Tax Preparation

Employee Assistance Programs

Traditional EAPs offer free, confidential, and short-term support for employees suffering from:

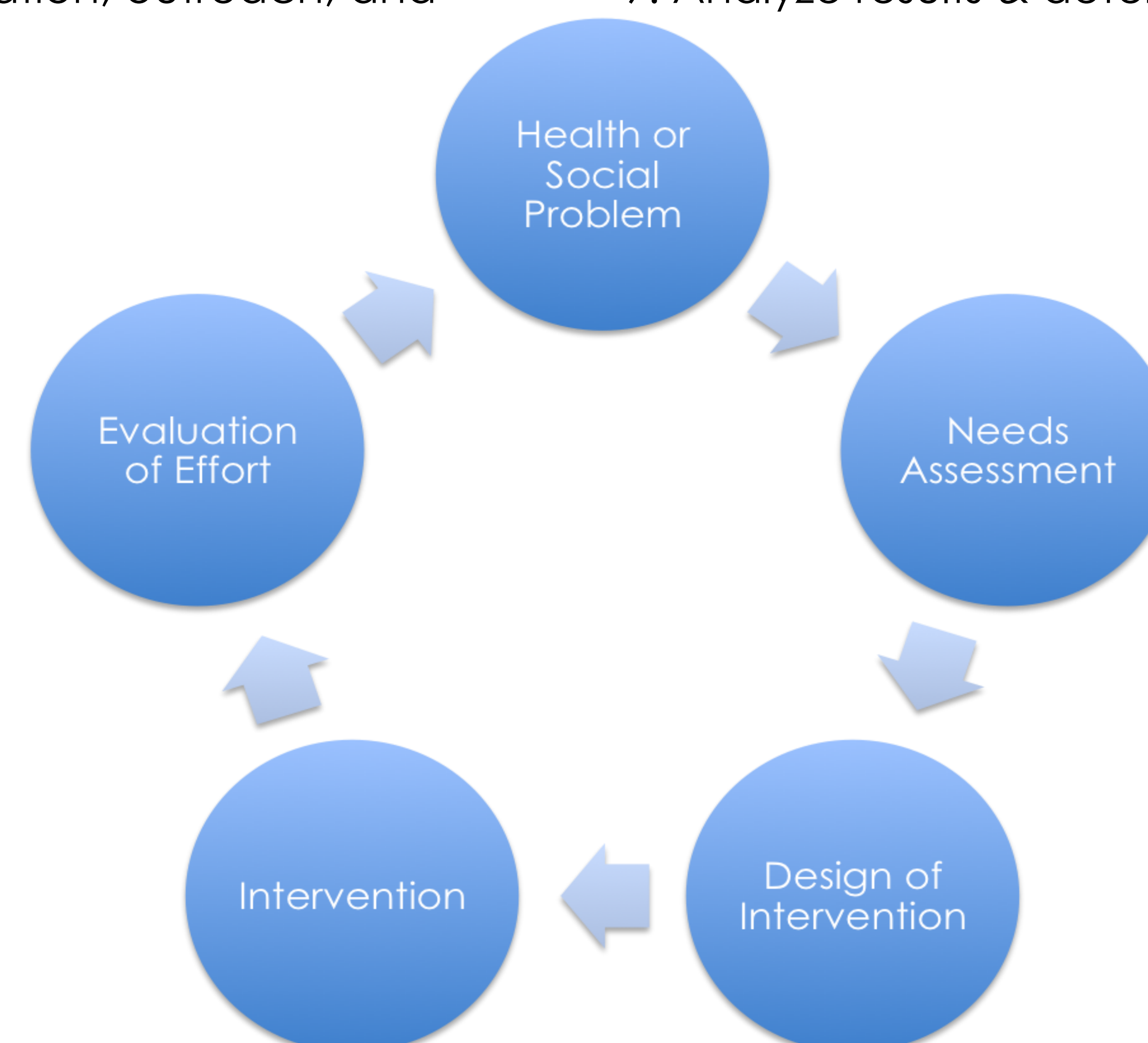
- Mental health diagnoses
 - General health & wellness
 - Alcohol or substance abuse
 - Family stress & Grief
 - Legal or financial problems
- (An Employer’s Guide to Employee Assistance Programs, 2008; Employee Assistance Programs, 2015)

Financially-oriented EAPs provide on-going education for employees specifically related to:

- Creating household budgets
 - Retirement & estate planning
 - Improving credit scores
 - Paying for higher education
 - Long-term financial success
- (Making Financial Education Work in the Workplace: The Citigroup Experience, 2011; Garman, et al., 1999).

Needs Assessment Process

1. Determine organizational capacity to undertake project
2. Set budget & identify funding sources
3. Establish diverse committee
4. Formulate education, outreach, and marketing plan
5. Set timeline for process
6. Develop or adapt needs assessment tools
7. Identify participants
8. Perform needs assessment
9. Analyze results & determine best approach



The Social Service Program Life Cycle (Royse, Staton-Tindall, Badger, & Webster, 2009)

Recommendations

Before the United Way of Broome County considers implementing any workplace-based employee assistance program, it will first have to:

- Determine the need for such a program in this community.
- Consider a variety of programs and provide services that are not offered through other providers.

Works Cited

(2008). An employer’s guide to employee assistance programs: recommendations for strategically defining, integrating, and measuring EAPs. Center for Prevention and Health Sciences. Retrieved from www.easna.org/documents/PS2-NBGRRecommendationsforDefiningandMeasuringEAPs.org.

(2015). Employee assistance programs. Retrieved from www.inc.com/encyclopedia/employee-assistance-program.html.

Duguay, D. & Arnone, W. J. (2011). Making financial education work in the workplace: The Citigroup experience. Community Dividend. Retrieved from www.minneapolisfed.org/publications/community-dividend/making-financial-education-work-in-the-workplace-the-citigroup-experience.

Garman, E.T., Kim, J., Kratzer, C.Y., Brunson, B.H., & Joo, S. (1999). Workplace financial education improves personal financial wellness. *Financial Counseling and Planning*, 10(1), 79-88.

Giuffrida, I. (2015). The workplace as a platform for financial stability: A profile of Working Bridges, A project of the United Way of Chittenden County. Retrieved from www.unitedwaynwvt.org/files/galleries/Working_Bridges_Profile_FINAL.pdf.

Royse, D., Staton-Tindall, M., Badger, K., Webster, J.M. (2009). “Social Service Program Life Cycle” From *Needs Assessment*. Oxford University Press: New York, NY. Pg. 16.

Acknowledgements

To my friends and colleagues at the United Way of Broome County, thank you, for all you have done to encourage and support me during my entire graduate career and especially during the Capstone process. Thank you also, to the faculty members of the Masters of Public Administration Program at Binghamton University, who have been a guiding force in my time in the program.