



Report of the Professional Issues Forum on **Disability Management** Winnipeg, MB CAOT Conference 2003

Introduction

The CAOT Professional Issues Forum on Disability Management was held at the Delta Winnipeg Hotel on May 26, 2003 from 1:30 to 3:30 p.m. There were approximately 30-35 participants in attendance. This number included the speakers and invited representatives of CAOT, constituent and stakeholder groups and other delegates to the CAOT Conference.

Format

The Forum consisted of panel presentations, a roundtable discussion and a large group discussion.

Facilitator

Professor Muriel Westmorland from the School of Rehabilitation Science, at McMaster University in Hamilton Ontario, facilitated the Forum. Muriel is active in research and policy development related to disability management in Canada and internationally. She is a board member of the National Institute for Disability Management and Research (NIDMAR) and is a member of the Canadian Forces Advisory Council where she provides input into issues related to occupational rehabilitation and research in general.

Panelists

Kim Roer is an Occupational Therapist with several years of disability management experience in developing and implementing various work injury management programs. Kim Roer recently developed the Disability Prevention and Management Guidelines for Health Care for the Winnipeg Regional Health Authority.

Jeff Curtis is a member of the Senior Human Resources Team at Manitoba Telecom Services (MTS) and plays a lead role in the delivery of human resources, including disability management for the MTS family of companies. His past experience included positions with the Workers Compensation Board (WCB) of Manitoba where his involvement included developing policy research and planning, directing vocational rehabilitation as well as claims adjudication.

Pete Walker is a Health Safety and Environment Representative at the Manitoba Federation of Labour (MFL). Prior to this appointment he was employed for over 20 years with Canadian National (CN) rails as a steel fabricator. Pete Walker is active on many advisory groups and is a member of the newly formed Manitoba WCB Return to Work (RTW) stakeholder advisory group.

Forum Goal

With a broad cross-section of principal stakeholders, the goal is to shape the future of occupational therapy practice in disability management in Canada.

Objectives

Partnerships

1. Create opportunities to collaborate with individuals and organizations that have a direct interest in the future of disability management services regionally and nationally.
 - 1.1 Define disability management.
 - 1.2 Develop a list of contacts for present and future advocacy actions.

Policy

2. Identify and explore policy issues related to the advancement of disability management services
 - 2.1 Identify the role of employers and labour in disability management services for workers.
 - 2.2 Examine the impact of the trends and pressures on policies that govern disability management services
 - 2.3 Examine the impact of disability management policy issues on the structure and process of disability management services.

Practice

3. Identify strategic options to advance occupational therapy practice in disability management services.
 - 3.1 Explore a model of occupational therapy practice in disability management.
 - 3.2 Examine the evidence of effectiveness of occupational therapy practice in disability management.
 - 3.3 Describe the characteristics of an occupational therapy practice that engages in the delivery of disability management services.

Research

4. Identify future policy and practice research priorities.

Education

5. Identify educational resources to advance occupational therapy in disability management.

Panel Presentations

Facilitator

Muriel Westmorland introduced the topic of disability management and reviewed background issues related to the development of this field in general, and in particular, Canada.. Examples of research were shared, especially recent models that have developed in the field. Areas highlighted were: the reduction in numbers of persons with disabilities hired in the last five years; move to wellness in the workplace which fits with an integrated policy of disability management; importance of management buy in to the disability management process and the fit between disability management and occupational therapy models of practice with their client centred focus. The importance of further research in this field was also stressed.

Kim Roer, Occupational Therapist –

This presentation emphasized the fact that over 42% of Canadian occupational therapists (OTs) are in private practice, delivering services related to return to work or return to function. OTs provide assessment services in terms of functional capacity evaluations (FCEs), job demands analysis, ergonomic evaluation and advice, pre- and post-employment and vocational assessments. Rehabilitation roles include work injury management programs, case management RTW programs, pain management programs and job modification/accommodation advice. Prevention is an important part of managing workplace disability and OTs are providing services in this area which include: education/training, ergonomics, injury prevention strategies, analysis of job hazards and work site evaluations. The wide range of payors of these services was highlighted and include automobile insurance carriers, WCB, life insurance companies, employers, government agencies, lawyers and unions. The occupational therapy focus on person, environment and occupation fits very well with the field of disability management, however there are challenges for the future and they include: more emphasis in the occupational therapy curricula on disability management, increased fieldwork opportunities for occupational therapy students to learn about disability management, development of continuing education in disability management for OTs and increased research in the field.

Pete Walker, Manitoba Federation of Labour

Manitoba labour groups have been active in the area of disability management for many years. In 1992 the Manitoba Workers with Disabilities Project began through a partnership of labour and disability communities. This project has been active in its identification of key issues related to employment and disability and has not only met with employees but held two national conferences that addressed major issues in disability management. Additional materials developed as a result of this project include a video showing examples of progressive workplaces who have employed persons with disabilities, materials on duty to accommodate persons with disabilities and the development of a process for work experiences that is supported by labour and disability organizations. The guiding principles common to implementing successful programs were highlighted and these include macro and micro components such as the provision of comprehensive worksite policies, commitment to prevention, clear and open communication, availability of education peer support and at the micro level flexibility, individualized work plans, timely intervention respect of confidentiality and a program that is worker-centred and directed. This presentation stressed the importance of worker involvement in the process and how the union can and does act as a supportive component of the disability management process.

Jeff Curtis, Human Resources Manitoba Telecom Services (MTS)

This presentation was entitled Putting Disability Management in the Broader Context. A review of MTS was provided highlighting their commitment to disability management. The question of “Why to employers care?” was posed and the issue of the human and financial costs of disability were cited as a traditional way of looking at the answer. Instead it was suggested that there are emerging reasons why employers care about providing comprehensive disability management services such as: creating a healthy organization; the competition for talent in the marketplace; the cost of hiring and retaining that talent; an important part of the employee value proposition (EVP) and the employers promise to employees and the impact on employee engagement, customer loyalty and the company’s bottom line. A model was shared that showed the strategic fit

of disability management within an organization. The issue of maintaining knowledge and skill competencies when working in the disability management field was raised and it was suggested that OTs need to know about organizational behaviour and development, program and policy development as well as business acumen. The presenter reminded the participants that OTs need to rise to the challenge of providing disability management and that they need to build the ability to meet client needs by increasing their capability and capacity in the disability management field.

Summary of Discussion

The following questions were posed:

1. What individuals, groups and organizations have a role or interest in the field of disability management? How would you work together to advance disability management services?
2. What additional skills and knowledge do you require to practise in the field of Disability Management?
3. What areas of research do you need to inform your practice in the field of disability management?

Participant Discussion

Question 1. Identification and interest of stakeholders

The group was unanimous that everyone does have an interest and those specifically mentioned included: workers compensation boards, employers, unions, insurance carriers, health care professionals, employees, legal profession, support groups, advocacy groups, health ministries, policy development staff, family, disability management professionals, (health educators (occupational health and rehabilitation specialists), employee assistance programs (EAP), occupational therapists.

What is needed to advance DM?

The suggestions ranged from joining workplace health and safety committees, getting to know the worksite, personnel in the worksite such as human resources and, occupational health professionals. The importance of identifying the hot spots was raised especially understanding the perspectives of human resources, unions, workplace health and safety representatives, workers compensation claims personnel in relation to these hot spots. The participants agreed that it was very important to complete a thorough needs assessment of the workplace where possible. In addition, identifying disability management leadership and expertise within the company was also important to align disability management goals with the corporate strategy. This is essential to advance disability management. It was noted that middle management is critical to moving disability management forward and that occupational therapists (OTs) should be supportive of this group and provide the necessary education. Issues that can and should be addressed in developing a disability management framework include: employee attendance, turnover, absenteeism, recruitment, retention, morale, loyalty and satisfaction.

Suggestions for working together to advance disability management services

The following strategies were recommended to advance disability management services by occupational therapists: determine who the stakeholders are or who has knowledge about the specific workplace system; clarify roles and goals before entering the system; promote open communication between all parties; foster an open door policy with respect to case specific and general disability management issues; discuss policy development for disability management and workplace health with all stakeholders; educate the employer regarding the financial implications of disability management; use case examples with positive outcomes where possible to advance disability management to the employer.

Question 2. Additional skills and knowledge needed by OTs

Eighteen areas were identified in answer to this question. They were: marketing (including PR/communication skills); knowledge of business and business finances; awareness of policies and legal ramifications of disability management; familiarity with human rights and labour legislation; knowledge of management policies within the specific workplace; familiarity with the importance of a business culture and its impact on disability management; ability to negotiate as well as facilitate discussion, decisions regarding disability management e.g., who is disability management advocating for and employed by?; enhanced problem solving skills which apply to all situations and with all stakeholders; skills in assessing ergonomic features as well as the demands of each job; team building skills; knowledge of and ability to utilize community resources; awareness and ability to work with employees including application of motivational techniques; development of a broad perspective on disability management (thinking outside OT); ability to search the literature for relevant research related to disability management.

Question 3. Research Needs

The participants agreed that the Canadian Model of Occupational Performance is well established and provides a useful framework for disability management. The following gaps were identified and it was felt that these could be addressed through research. These were: lack of an accepted definition of disability management; model for equating cost effectiveness with disability management programs; variations in disability management best practices between companies and with clients; evaluation of different marketing approaches in disability management; evaluation of how increased business skills by OTs impact the ability to establish disability management programs in the workplace; the impact of distance education modules (e.g., NIDMAR's Certificate Program in Disability Management) in organizational behaviour and cost-benefit analysis on the performance of OTs in disability management programs; the utility of applying successful disability management case studies to develop disability management programs for employers; establishment of Canadian Occupational Therapy Foundation disability management grants for research.

Recommendations to CAOT

That CAOT:

1. Establish a national occupational therapy disability management database that can be used for both research and policy development.
2. Support the examination of the theoretical foundation of disability management to develop the application of an evidence based approach to practice.
3. Develop a guide that would translate improved occupational performance in the workplace into cost savings for employers.
4. Support the development of research that supports the Occupational Performance Model and includes the business component of disability management.
5. Develop a strategy for moving disability management forward that would include further discussion with disability management stakeholders (unions, government, employers, employees and professionals) and establish an action plan with targeted outcomes.