The CSA Z1011:20, *Work disability management system* Standard

Webinar 10
Continued Conversations on the Insurer's Perspective

Monday March 8, 2021
12:00 noon to 1 p.m. EST

CRWDP
CRPIP

CANADIAN INSTITUTE SAFETY, WELLNESS & PERFORMANCE

CONESTOGA | BUSINESS
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CSA GROUP™

Agenda for the Session

1. Introduction to the CSA Group and standards development
2. High-level summary of the Standard (CSA Z1011:20, *Work disability management system*) with a focus on the insurer's role
3. Fireside chat with panelists including questions and comments from attendees

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Moderators and Panelists

Emile Tompa
Director, CRWDP

Lina Lopez
Project Manager
CSA Group

Vincent Russell
Director, Employer RTW
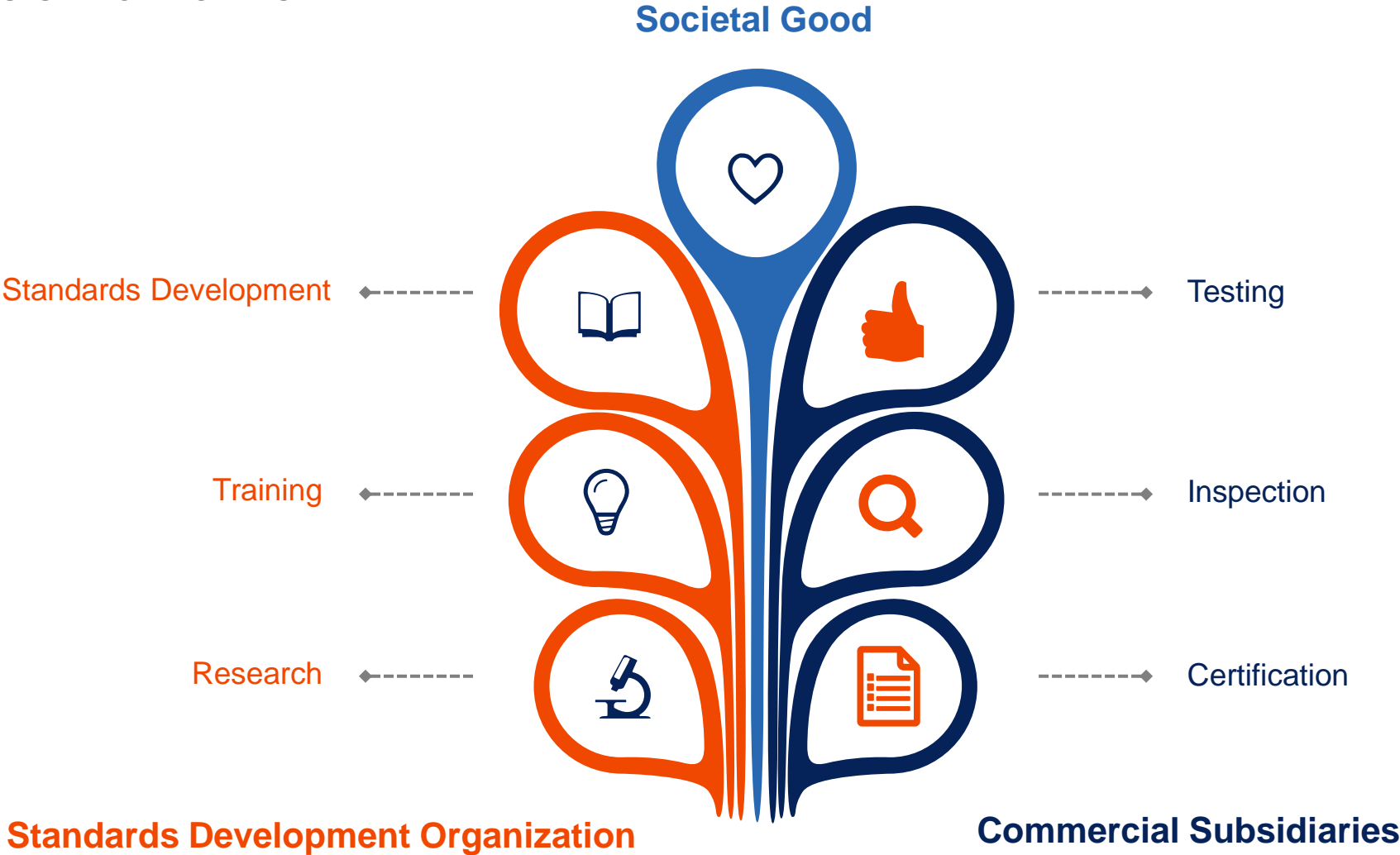Programs
WorkSafeBC

Joe Baiardo
Manager/Paralegal
Canada Life – Ford of
Canada

Standards Development Process

CSA Group At-a-Glance

HOLDING THE FUTURE TO A HIGHER STANDARD

Societal Good

Standards Development

Training

Research

Testing

Inspection

Certification

Standards Development Organization

Commercial Subsidiaries

Standards Development Organization

Consensus Based Decision Making

OUR AREAS OF FOCUS

- 12 areas of focus
- 10,000 dedicated members
- ~1,115 Standards Technical Committees
- Accredited, balanced, consensus-based approach
- 12 areas of focus

- Electrical
- Health Care and Well-being
- Environment and Natural Resources
- Nuclear
- Construction and [Infrastructure]
- Public Safety
- Management Systems
- Occupational Health and Safety
- Fuels and Transportation
- Mechanical and Industrial Equipment
- Information and Communication Technology
- Petroleum and Natural Gas

Ensuring the right people are involved, the right voices are heard, and the right process is followed

Examples of CSA Standards with an Occupational Health and Safety (OHS)

OHS Management System Standards

- CSA Z45001:19 *Occupational health and safety management*
- CSA Z1001-18 *Occupational health and safety training*
- CSA Z1002-12(R2017) *Hazard Identification and elimination and risk assessment and control*
- CSA Z1003-13 *Psychological health and safety in the workplace*
- CSA Z1004-12 *Workplace ergonomics*
- CSA Z1005-17 *Incident Investigation*
- CSA Z1006-16 Management of work in confirmed spaces
- CSA Z1007-16 Hearing loss presentation program (HLPP) management
- CSA Z1008 *Management of impairment in the workplace (under development)*
- CSA Z1010-18 *Work in extreme conditions*
- **CSA Z1011:20 Work disability management system**
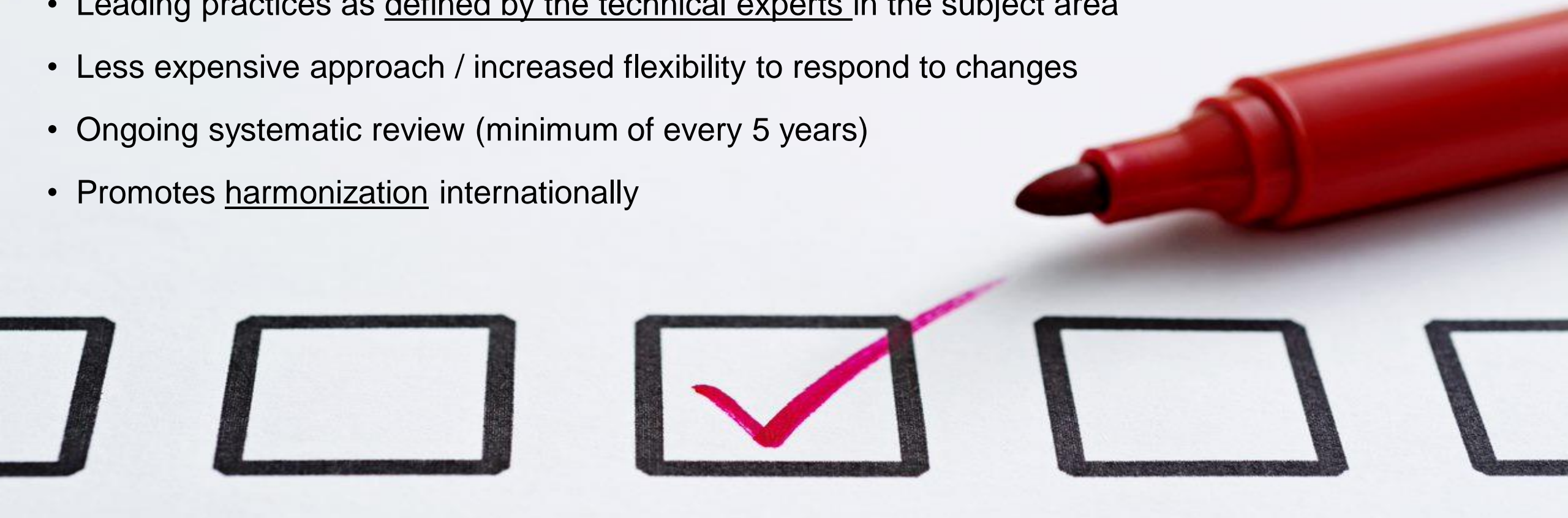- CSA B701-17 *Carer-inclusive and accommodating organizations*

- **Occupational Diving Standards**

- **OHS Standards for Public Safety Personnel**

- **OHS Nanotechnology**

- **Machinery and Equipment Safety**

- **Personal Protective Equipment**

- **Elevation Hazards**

- **Worker Wellness**
  - CSA Z1003-13, *Psychological health and safety in the workplace*
  - CSA Z1008 *Management of impairment in the workplace (under development)*
  - CSA Z1210-17 First Aid Kits for the workplace
  - CSA Z1220-17 First Aid Training for the workplace
  - CSA B701-17 *Carer-inclusive and accommodating organizations*
  - Worker Fatigue
  - CSA Z1004-12 *Workplace ergonomics*
  - **CSA Z1011:20 Work disability management system**

CSA Standards Development Process – The Cycle

Request / Evaluation / Authorization

Assign to Committee

Notification

Meetings / Draft

Maintenance

Public Review

Dissemination

TC Reaches Consensus

Final Edit / Publication

Procedural Approval

Technical Content Approval

Pre-Approval Edit

Submit requests for interpretation

Watch for the publication announcement!

Public input on the Draft Standard is welcome!

Why do organizations and governments adopt standards?

- Multi-stakeholder expert volunteer participation using a <u>consensus</u> based approach – CSA Group staff facilitate the accredited process

- Leading practices as <u>defined by the technical experts</u> in the subject area

- Less expensive approach / increased flexibility to respond to changes

- Ongoing systematic review (minimum of every 5 years)

- Promotes <u>harmonization</u> internationally

How can you or your organization get involved?

Membership
- Participate on a CSA Committee

Direct Input
- Provide direct input on Draft Standards that are issued for Public Review

Research & Academia
- Participate in / conduct research to support standards or join the academic challenge for undergraduates!

Join the Community
- Follow the CSA Communities of Interest and join the discussion! (100,000 current users)

Questions

Thank you.

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CSA Project Manager

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csagroup.org

CSA Z1011 Technical Committee Overview

- Technical Committee Members
  - Chair: Emile Tompa
  - Vice Chairs: Amin Yazdani
                                               David Brown
  - CSA Project Managers: Lina Lopez and Dave Shanahan
  - 26 voting members and several non-voting members

- Extensive efforts to ensure balanced representation from broad variety of stakeholder groups and substantive expertise amongst members
  - Employer representatives
  - Labour/unions and injured/disabled worker representatives
  - Health and safety professionals
  - Return-to-work specialists
  - Experts in work disability prevention
  - Work disability insurance/program providers
  - Academics/researchers

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List of Technical Committee Members (by last name)

T. Amell: CoreHealth Technologies, Calgary, Alberta, Canada
J. Baiardo: Canadian Vehicle Manufacturing Association (CVMA) — Ford of Canada, Oakville, Ontario, Canada
D. Bain: Donna Bain & Associates Inc., Toronto, Ontario, Canada
D. Barrett: Government of Newfoundland and Labrador, St. John's, Newfoundland and Labrador, Canada
A. Bieksa: United Steelworkers (USW) Local 2009, Langley, British Columbia, Canada
M. F. Coutu: Université de Sherbrooke, Longueuil, Québec, Canada
J. Dowdall: International Union of Operating Engineers (IUOE), Local 793, Oakville, Ontario, Canada
A. Farquhar: Lawyer, Toronto, Ontario, Canada
J. Geary: National Institute for Disability Management (NIDMAR), Toronto, Ontario
J. Giulione: L'Arrimage, Montréal, Québec, Canada
M. Haan: Canadian Council on Rehabilitation & Work (CCRW), Toronto, Ontario, Canada
P. Lahey: Employment and Social Development Canada (ESDC), Gatineau, Québec, Canada
M. Lallouz: Ometz, Montréal, Québec, Canada
G. LeBlanc: United Steelworkers (USW) — Canadian National Office, Toronto, Ontario, Canada
M. MacDonald: Jazz Aviation LP, Dartmouth, Nova Scotia, Canada
C. Makar: Deloitte, Toronto, Ontario, Canada
C. J. McInnis: International Brotherhood of Boilermakers (IBB), Edmonton, Alberta, Canada
T. McKenna: Canadian Union of Public Employees (CUPE), Burnaby, British Columbia, Canada
B. Nowrouzi-Kia: University of Toronto, Toronto, Ontario, Canada
G. Pomaki: Manulife, Vancouver, British Columbia, Canada
L. Porplycia: School Boards' Co-operative Inc., Markham, Ontario, Canada
J. G. Rabideau: Workplace Safety & Insurance Board of Ontario (WSIB), Toronto, Ontario, Canada
V. Russell: WorkSafeBC, Vancouver, British Columbia, Canada
S. Sairanen: UNIFOR, Toronto, Ontario, Canada
D. Sousa: Ontario Occupational Health Nurses Association (OOHNA), Toronto, Ontario, Canada
K. Stathakos: ArcelorMittal Dofasco, Hamilton, Ontario, Canada

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Centre for Research on Work Disability Policy (CRWDP)

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What is the Problem?

- Annual cost of work disability is estimated at between $1-2 trillion worldwide
- In Canada alone, recent estimates of the cost of exclusion identify the total Canadian burden at $337.7B (17.6% of GDP) across all social domains
- Productivity and output costs component is $62.2B (3.2% of GDP)
- Prevalence of chronic and episodic disabilities increasing with aging of the labour force
- Disability associated with poor mental health on the rise
- High levels of unemployment amongst people with disabilities
- Current practice for work disability prevention management is varied, piecemeal and often not based on an organization wide approach

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Purpose of the Standard

- Provide a consensus-based framework for the management of work disability at the organizational level to address **both physical and mental health needs of workers**

- Relevant for the management of both work-related and non-work-related health needs

- Include consensus-based guidance for **recruitment, hiring and onboarding** of workers with disabilities

- Supporting materials are provided in Annexes to the standard, including implementation tips

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Systems Approach

- Traditional approach used to address work disability issues within organizations
  - Assign role of work disability manager to a particular person
    - Within human resources department
    - Within OHS department
  - Handle workers' compensation claims separately and differently than non-work-related injuries and illnesses
  - Some organizations may farm out disability management function
  - Take a reactive role to performance measurement using indicators such as absence days
- **Systems approach** is proactive and considers roles and responsibilities across the organizations
  - Considers **inputs, process, outputs and feedback**
  - Evaluation and improvement on a continual basis

INPUT → PROCESS → OUTPUT
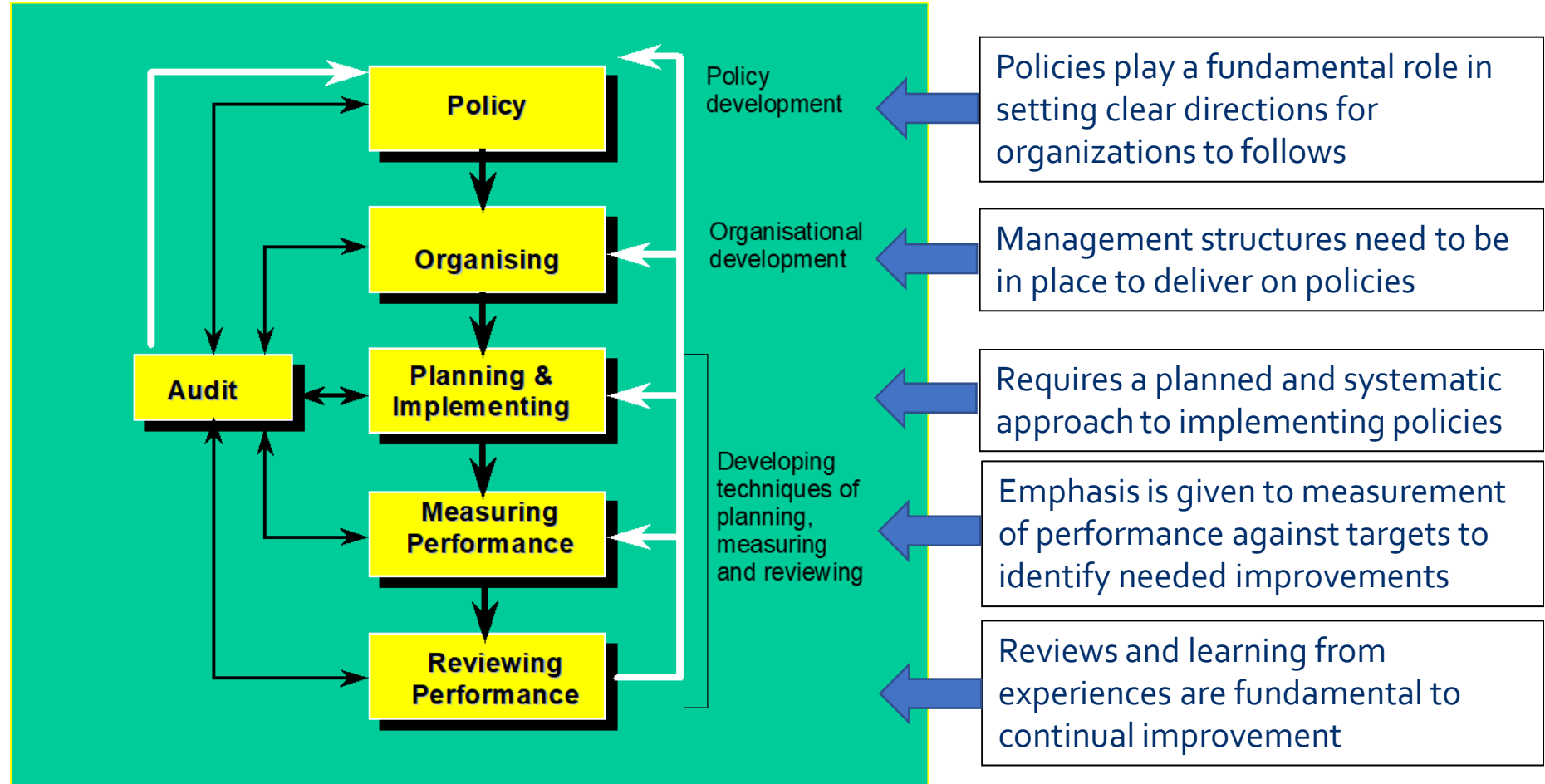
FEEDBACK

Organisation

External Environment

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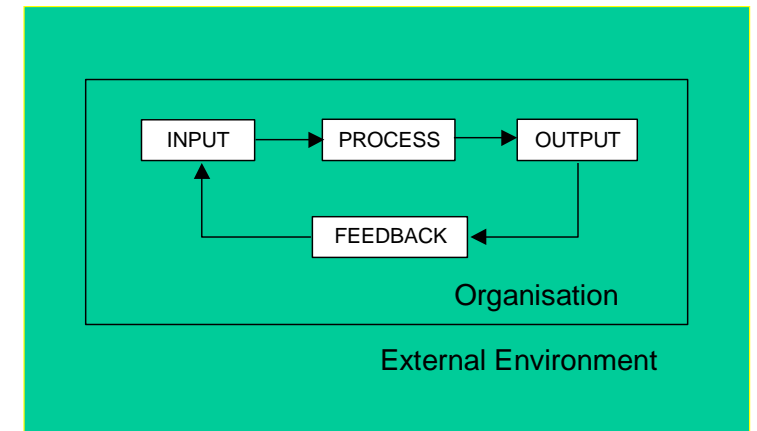
What is a Management System?

- A formalized framework of policies, processes and procedures used by an organization to meet its objectives

- Documented and tested step-by-step method aimed at smooth functioning through standard practices

- Audits are a vital part of the management system approach

- Ideally, organizations have frameworks in place to address all core aspects of organizational activities including **work disability management (WDM)**

- Systems approach to work disability management ensures clarity, consistency and integration with other organizational activities

- The Standard promotes a proactive approach – addresses health needs of workers before they become disabling – **work disability prevention –** whether health need arises from exposure at work or elsewhere

Management System   OHS   WDM

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Management System Model*

Policy development

Organisational development

Developing techniques of planning, measuring and reviewing

Policies play a fundamental role in setting clear directions for organizations to follows

Management structures need to be in place to deliver on policies

Requires a planned and systematic approach to implementing policies

Emphasis is given to measurement of performance against targets to identify needed improvements

Reviews and learning from experiences are fundamental to continual improvement

*Health and Safety Executive Model (HSG65)

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Continual Improvement Cycle

Plan-Do-Check-Act (PDCA)

Continual Improvement Cycle

1. Plan: Establish improvement objectives
2. Do: Implement the plan
3. Check: Monitor and evaluate progress
4. Act: Review and take action to improve

• Review and assessment

• Policies and procedure

Act

Plan

Check

Do

• Monitoring and evaluation

• Implementation

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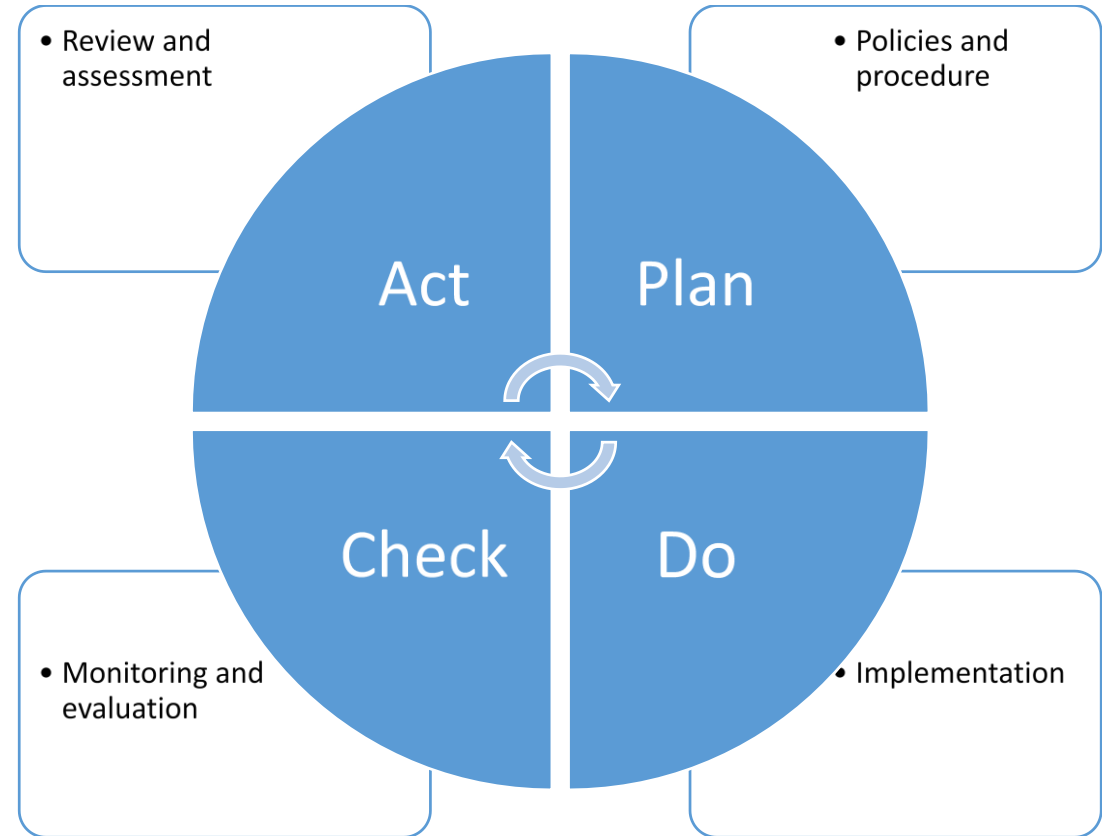
Framework for CSA Z1011:20, *Work disability management system*

- The framework is broad to facilitate integration with other organizational activities

- Designed to be integratable with other Canadian/international standards including CSA Z45001:19 *Occupational health and safety management*, CSA Z1003 *Psychological health and safety in the workplace*, ISO 9001 *Quality management*

- Takes a systematic, organization-wide approach

- Emphasizes joint management and integration with other activities and responsibilities

- Uses common language and terminology where possible, drawing on vocabulary of other standards

- *The standard is voluntary and is intended to serve as guidance that specifies best practices about the minimum requirements of the law*

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Six Guiding Principles at the Foundation of this Standard

1. An evidence-informed, data-driven approach that is strategic in nature to ensure sound policies and processes
2. A focus on inclusion and accessibility to promote engagement and belonging
3. Taking a worker-centred, supportive approach that is contextualized and case-by-case
4. Promoting accommodation and early return-to-work that considers the essential duties of the worker's role within the organization
5. Joint responsibility between the organizational management, worker/workforce, and worker representatives (where applicable)
6. Legal compliance (as applicable in the jurisdiction)

These principles apply for all worker health needs, regardless of cause, and also for recruitment, hiring and onboarding of persons with disabilities

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Generalizeability

- The Standard is generic and designed to be adaptable to the specific context of an organization
- Applicable to organizations in Canada of any size, private/public, for profit/not for profit, operating in any sector
- Considers both physical and mental health needs of workers, regardless of cause
- The Standard provide the "what"
- Implementation is the "how" – some implementation tips are provided in an annex

Management and Organizational Roles and Responsibilities

Senior management commitment to development, implementation, and maintenance of the disability management system

- Provide appropriate resources
- Define and communicate the roles and responsibilities
- Provide the required support
- Facilitate worker participation and consultation
- Provide leadership and accountability
- Establish a framework for regular reporting

Organizational responsibilities

- Encourage collaboration
- Ensure access to timely information
- Ensure supervisors have skills and abilities to address worker health needs
- Ensure rights to privacy
- Responsible for ensuring inclusive and accessible workplaces

Contents and Annexes

Core Sections

Contents

0 Introduction

1 Scope

2 Referenced publications

3 Definitions and abbreviations

4 Work disability management system

5 Planning

6 Implementation

7 Performance Monitoring, Evaluation, and Continual Improvement

Informative Annexes

- Developing a Business Case for WDM System
- Role of Experts
- Management of Confidential Information
- Implementation Tips
- Systemic Barriers and Unconscious Bias
- Using Evidence-informed Methods, Technologies, Resources and procedures
- Benchmarking and Monitoring Progress Using Quantitative and Qualitative Data
- Case Studies on Reasonable Work Accommodation
- Relevant Legislation

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Introduction

0.3 Challenges and opportunities in effective management of work disability

WDM is a complex process with multiple stakeholders within and outside of the organization, including a range of insurance programs and support service providers. These can include workers' compensation insurance, private short- and long-term disability insurance, employment insurance, Canada/Québec Pension Plan Disability programs, and employee group benefit plans. Given the complexity of WDM, an organization's role in the WDM process can be unclear. Some organizations view their role as that of passive purchasers of insurance and support services; hence, their practices in this area are varied, piecemeal, and not based on an organization-wide approach. Conversely, taking a coordinated, proactive, organization-wide approach to WDM will ensure optimal performance and outcomes. Ideally, WDM is data-driven, using knowledge of the organization's past experiences and related performance in managing worker health needs to guide current policies and practices.

Core Sections of the Standard

4 Work Disability Management System

- Management commitment and leadership
- Responsibilities, accountability, and authority
- Organization's responsibility to an inclusive and accessible workplace
- Work disability management policies
- Work disability management procedures

5 Planning

- Review internal policies, processes, programs, procedures, practices, and resources
- Identify gaps, barriers and opportunities in internal policies, procedures, practices, programs, and resources
- Set objectives, targets, and establish an action plan

6 Implementation

- Implementing the plan with resources available
- Work disability preventative and protective measures
- Accommodation
- Improving organizational culture related to disability
- Training, awareness, and competence
- Managing change

7 Performance monitoring, evaluation, and continual improvement

- Monitor and evaluate the performance of the management system
- Internal audit
- Identifying new and unresolved issues
- Management review
- Continual improvement

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Training,

Managing

7 Perform
continual

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Ensure Foundations are in Place

This section emphasizes that involvement of all key stakeholders is essential – everyone plays a role

- *Senior management, front line managers/supervisors*
- *Internal subject matter experts, disability management specialists, healthcare professionals*
- *Workers and their representatives/unions*

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7 Perfo...
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- Monito...
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Plan for Success

This section emphasizes the need for the organization to understand its strengths and identify areas for improvement:

- *Developing a vision for future*
- *Considering the organization's unique situation and capacity*
- *Engaging all key stakeholders in the process*

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Core Sections of the Standard

This section emphasizes the importance of a well-thought-out plan to achieve success:

- *Emphasizes a proactive approach and culture change*
- *Sub-section on accommodating workers with disabilities in recruitment, hiring, and onboarding*
- *Notes importance of promoting an inclusive non-judgmental environment toward workers with disabilities*
- *Notes importance of ensuring workers are not reluctant about reaching out for assistance*

Make Changes

6 Implementation
- Implementing the plan with resources available
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Core Sections of the Standard

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This section emphasizes the importance of performance measurement:

- *Notes requirement of reviews, audits and continual improvement in recruitment, hiring and onboarding, as well as accommodation*
- *Emphasizes use of both qualitative and quantitative data in the evaluation*
- *Notes importance of addressing deficiencies identified on a timely basis*

Evaluate system

7 Performance monitoring, evaluation, and continual improvement

- Monitor and evaluate the performance of the management system
- Internal audit
- Identifying new and unresolved issues
- Management review
- Continual improvement

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Panelist Bios

Vincent Russell
Director, Employer
RTW Programs
WorkSafeBC

Joe Baiardo
Manager/Paralegal
Canada Life – Ford of
Canada

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Fireside Chat with Panel Members

Questions for Consideration

1. **Key challenges insurers experience in supporting employers.**
   i. What are some of the key challenges insurers experience in supporting organizations with work disability insurance claims?
   ii. Do the challenges vary by organizational size or sector?
   iii. How common are these challenges?
   iv. How might organizations be more proactive in their management of work disability?
   v. How might the adoption of a management system standard by an organization help overcome these challenges?

2. **Let's drill down on promoting early and safe return to work.**
   i. What are some of the issue organizations might experience with early and safe return to work?
   ii. Is it different for work related and non-work-related injuries and illnesses?
   iii. Is it different for mental health illness compared to physical health issues?
   iv. How can organizations be more proactive in supporting worker accommodation needs and early and safe return to work?
   v. How might the adoption of a management system standard support best practices in this area?

3. **Coordination work-related and non-work-related injuries and illnesses.**
   i. What advice would you give organizations about coordination of work-related and non-work-related disability claims?
   ii. What best practices would you recommend to organizations about coordinating services from disability insurance providers and other external services with their internal processes?
   iii. What advice would you give organizations about the first steps in developing their work disability management system?

4. **Do you have any other guidance to provide organizations who are considering adopting the standard?**

We will also take questions from attendees on a continual basis through the chat box

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Questions / Discussion

Future Webinars

➢March 22, 2021 (CISWP): Conversations on the Labour Perspective

➢April 26, 2021 (CRWDP): Continued Conversations on the Role of Healthcare and Disability Management Service

➢May 10, 2021 (CRWDP): Continued Conversations on the Labour Perspective

Thank You!

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For follow-up related to CSAZ1011:20 *Work disability management system*, please contact:

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