

Introducing the New CSA Standard for Work Disability Management Systems CSA Z1011

IWH Speaker Series
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Partners and Participants in the Development Process

CSA Group



Centre for Research on Work Disability Policy (CRWDP)



Conestoga College



Technical Committee Core Members

Chair	Emile Tompa
Vice Chairs	Amin Yazdani, Conestoga College David Brown, CIBC
CSA Project Managers	Lina Lopez and Dave Shanahan

Development Timeline

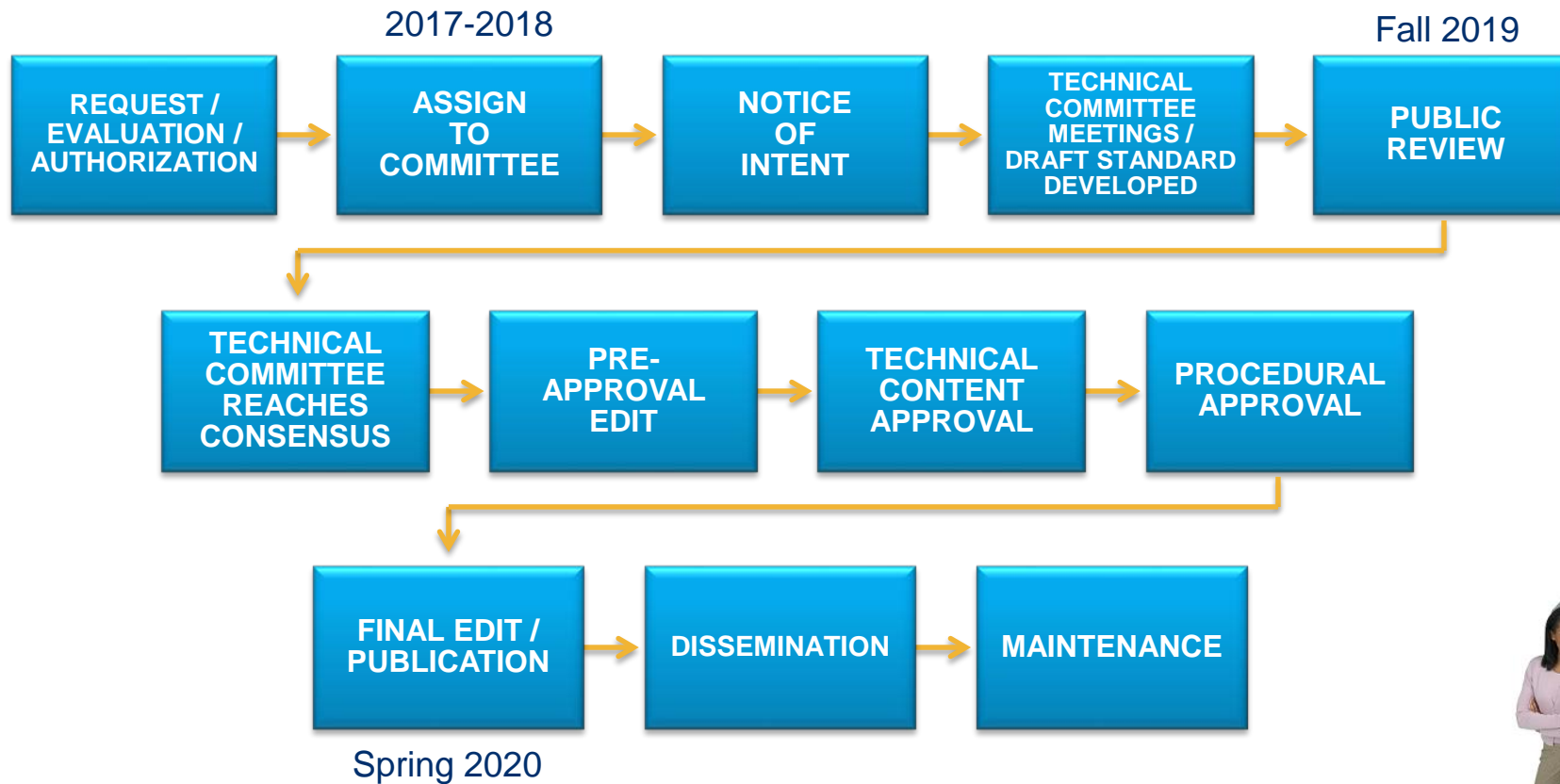
- **Project development started in 2014**
- **Development of the core standard through 2018 & 2019**
 - Call for Technical Committee in late fall 2018
 - Seed Document Developed in fall 2018
 - Technical Committee assembled, Standard drafted in 2019
 - Public review of draft Standard from Oct 2019 till Dec 6, 2019
 - Revisions of Standard by Technical Committee in Dec 2019
 - Currently under technical review with CSA Group
- **Planned Release of CSA Z1011 in spring 2020**
- **Material presented today is preliminary given final version of CSA Z1011 is not yet published**
- **Development of supporting guidance planned for 2020 onward**
- **Development of a Paramedic Disability Management System Standard 2020-2022**
 - Research activities – Scoping Review, Grey Literature Review and Environmental Scan of Good Practices
 - Focus is on mental health and post-traumatic stress

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Standards Development Process



Standards Development

- Process is open and inclusive
- Members of the technical committee develop technical content of standards
- Decisions are determined by consensus
- CSA also participates in international standards activity (IEC/ISO)
- Adoption of international standards where feasible
- Standards are voluntary unless referenced in legislation



CSA Z1011 Technical Committee Overview

- 25+ voting members and several non-voting associates
- Extensive efforts to ensure balanced representation from diverse stakeholder groups and substantive expertise amongst technical committee members
 - Employer representatives
 - Labour/unions and injured/disabled worker representatives
 - Health and safety professionals
 - Return-to-work specialists
 - Experts in work disability prevention
 - Legal counsel
 - Work disability insurance/program providers
 - Standards developers
 - Academics/researchers



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 17.6% of GDP (\$337.7B) 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



Purpose of the Standard

- Organizations need a way to incorporate best practices on work disability management into their management systems and day-to-day operations
- Purpose of this standard is to:
 - develop a consensus-based framework for the management of work disability at the organizational level to address **both physical and mental health needs of workers**
 - include consensus-based guidance for **recruitment, hiring and onboarding** of workers with disabilities
 - provide supporting materials including implementation tips to complement the standard



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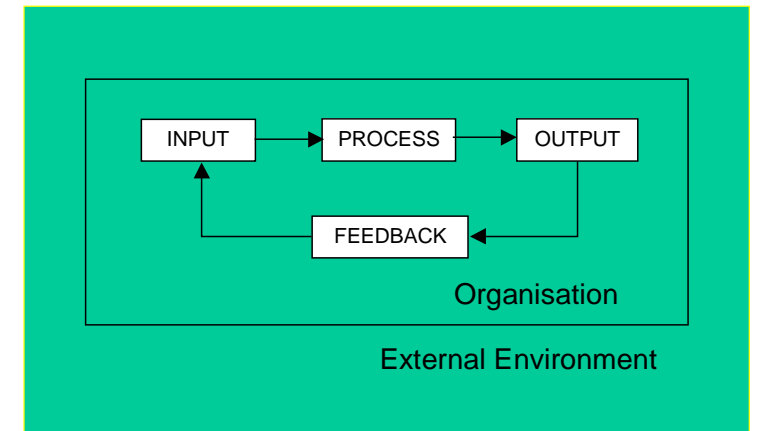
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How many of you have helped with the implementation of a standard in your organization?



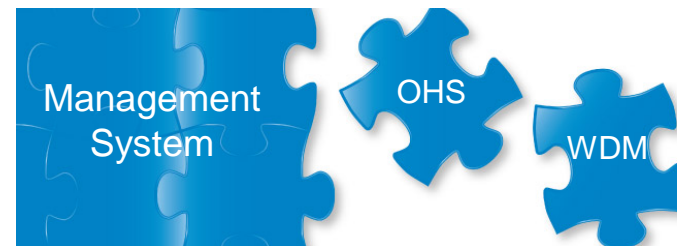
Systems Approach

- 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
 - Some organizations may farm out some or all of disability management needs
 - 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

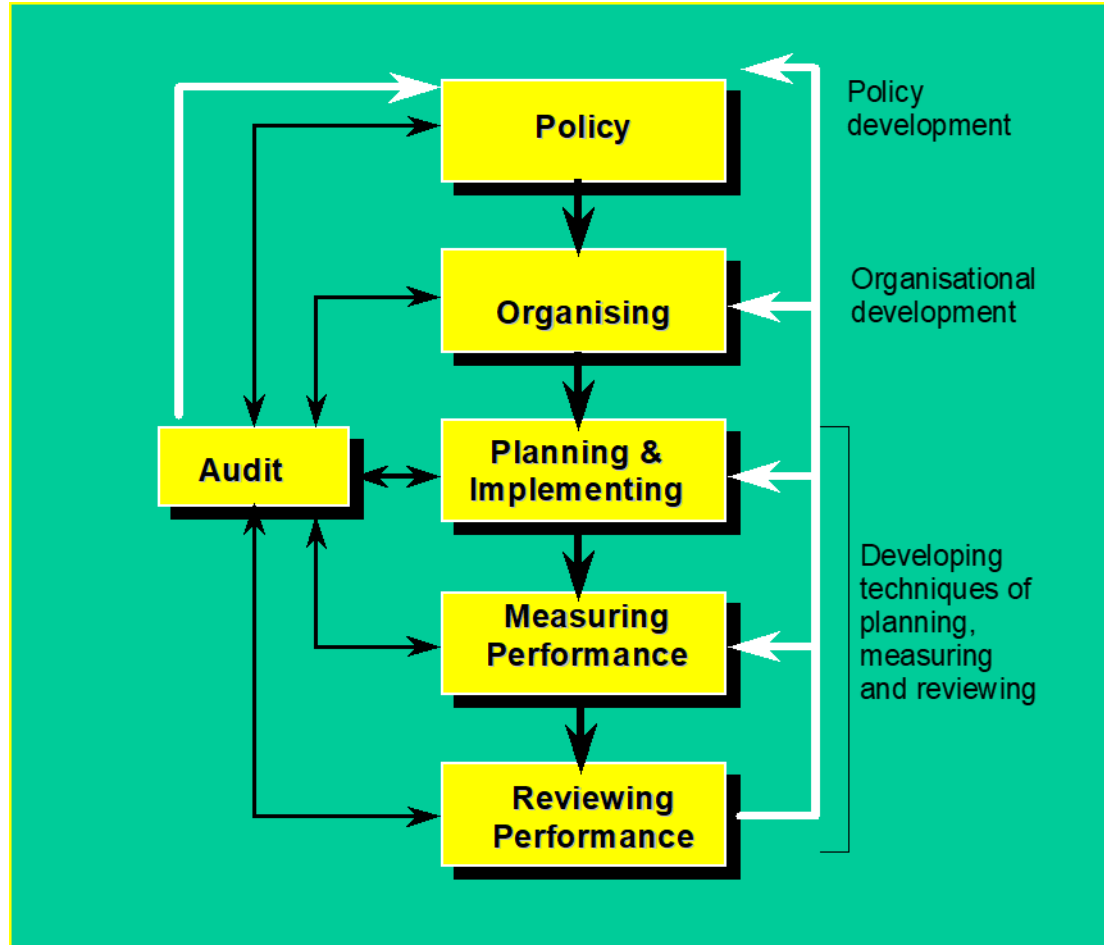


What is a Management System?

- 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
- Proactive approach – addresses health needs of workers before they become disabling – **work disability prevention**

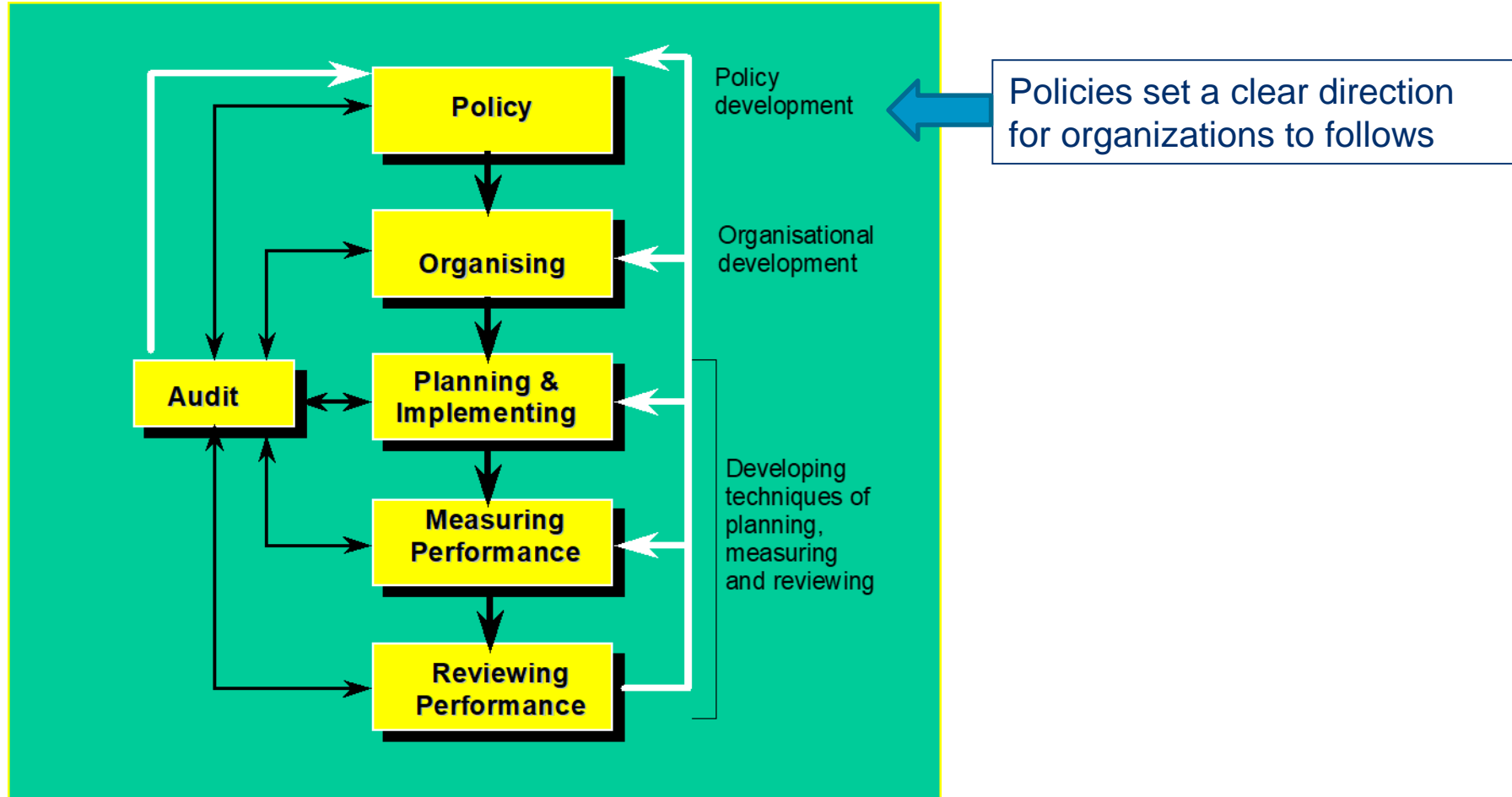


Management System Model*



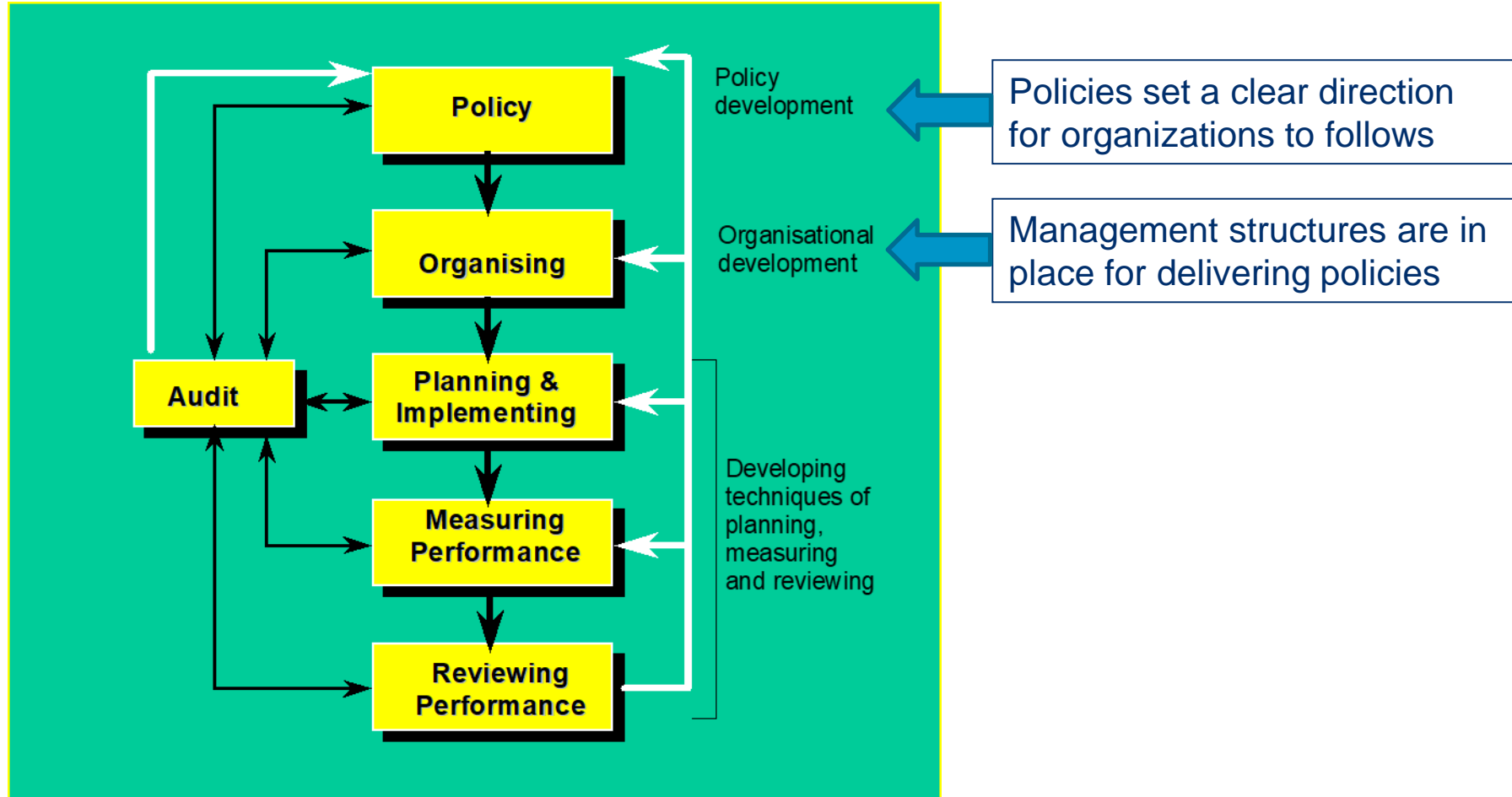
*Health and Safety Executive Model (HSG65)

Management System Model*



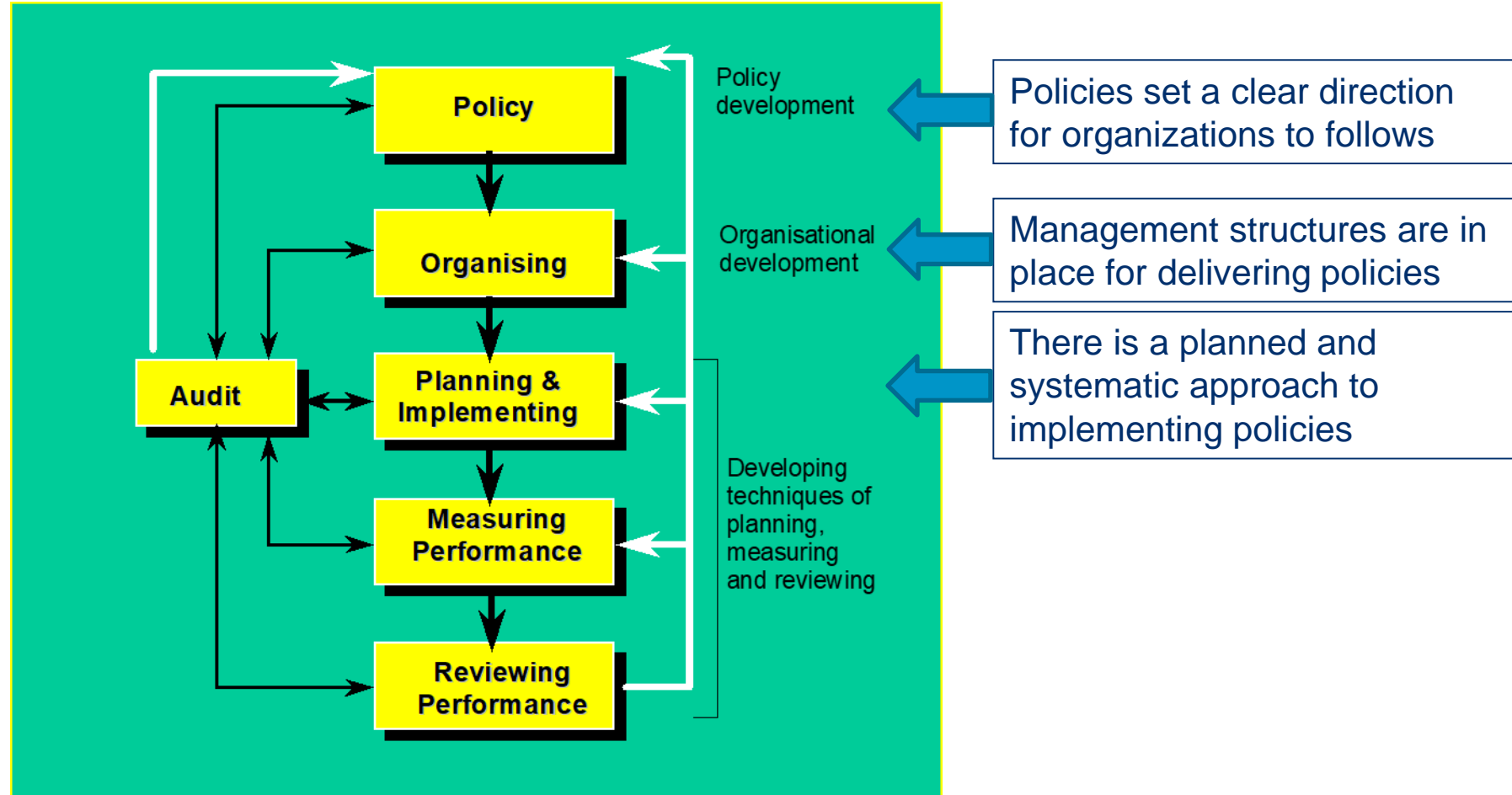
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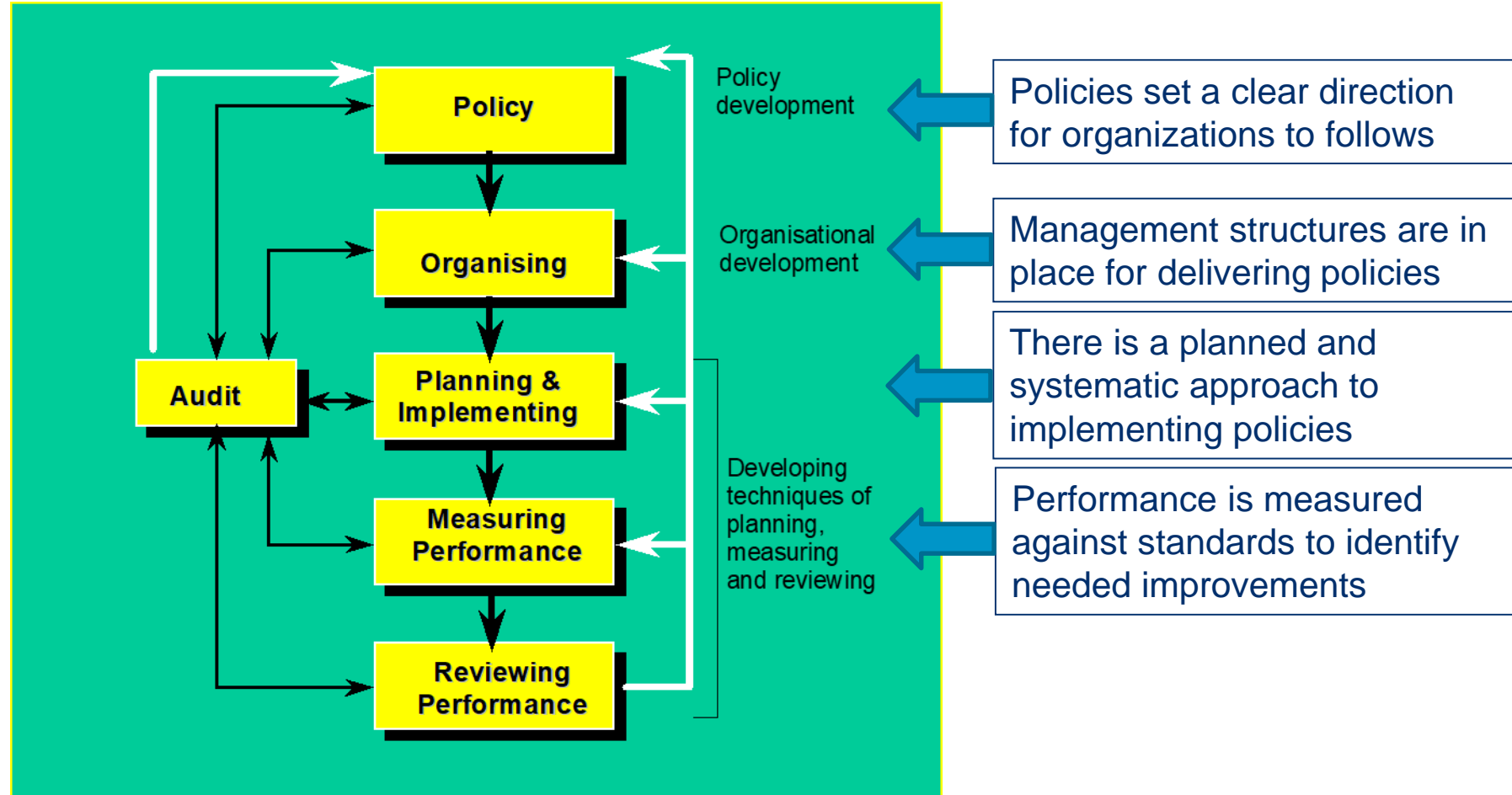
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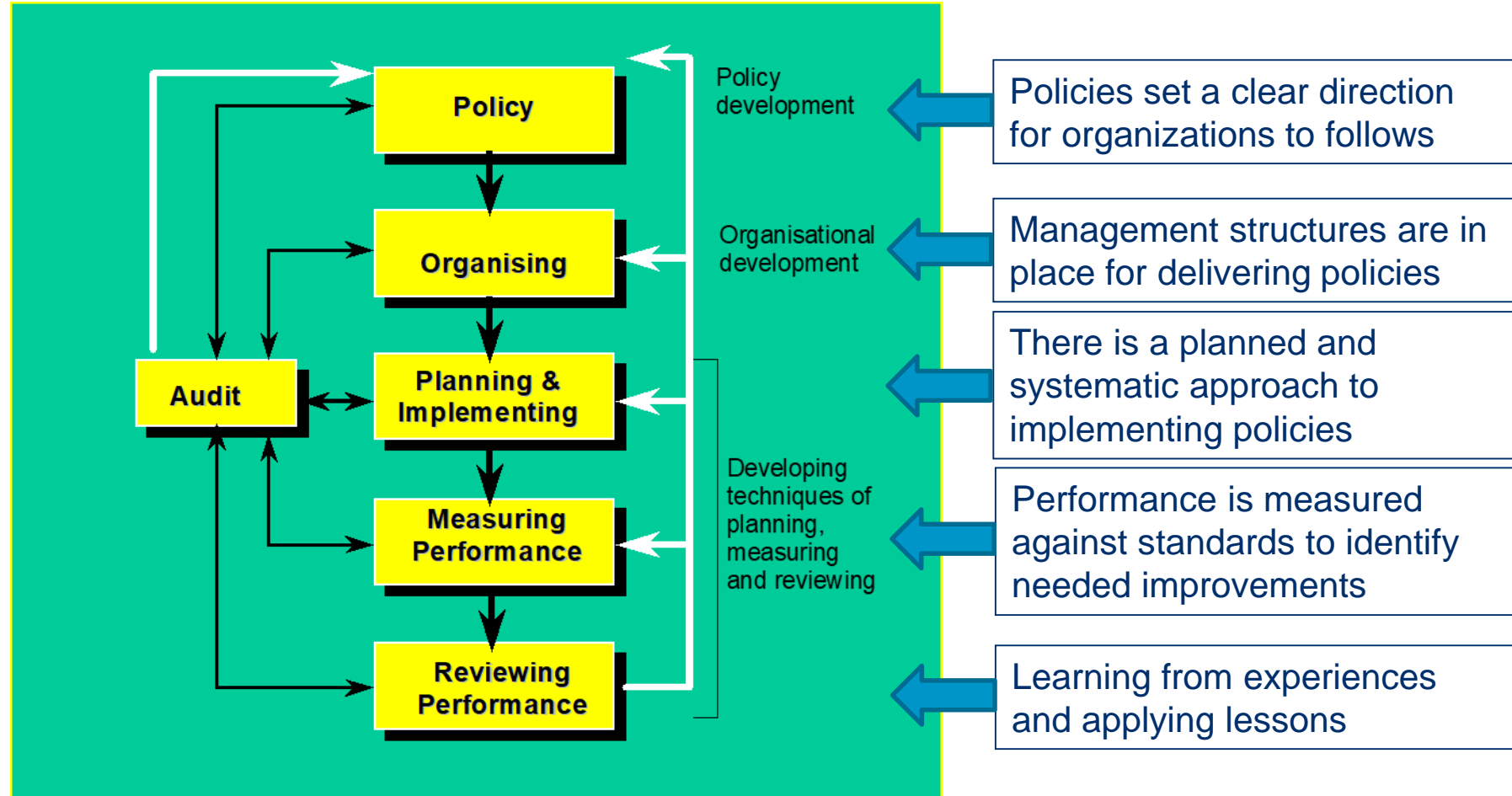
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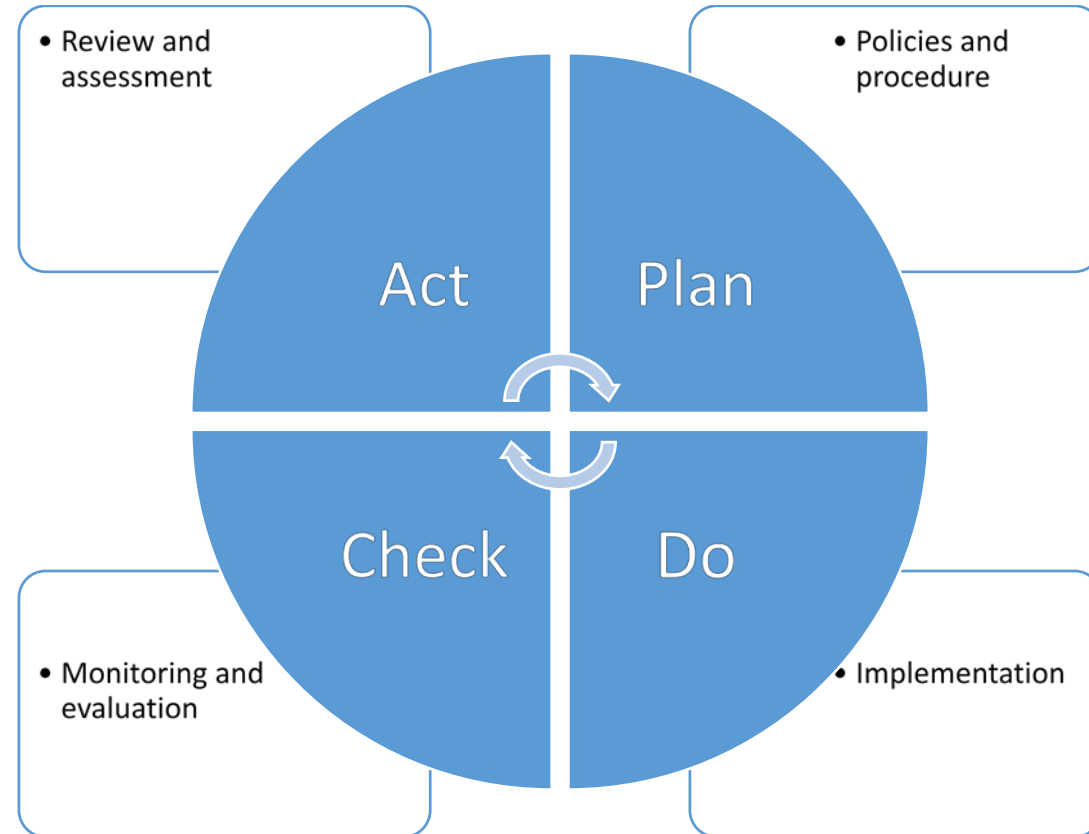
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Continual Improvement Cycle

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



Framework for this Standard

- A broadly applicable framework to facilitate integration with other organizational activities
- Integrated with other Canadian and international standards including CSA Z1000 (OHS), CSA Z1003 (Mental Health), ISO 9001 (Quality Management), and 45001 (OHS), etc.
- Systematic, organization wide strategy
- Joint management – work disability management integrated with other activities and responsibilities
- Common language and terminology – draw on vocabulary of other standards were possible



Framework and Some Principles

- A well-functioning system is **worker-centred**, takes a **case-by-case, contextualized, biopsychosocial** approach, and focuses on **maintaining work engagement**
- Important to avoid viewing a disability exclusively through a healthcare lens
- WDM process considers the worker's role within the organization, their essential duties, and the physical and psychological demands of their job
- Organization and a worker to take joint responsibility for the accommodation process, including monitoring and evaluation
- NB: Term “worker” used rather than “employee”



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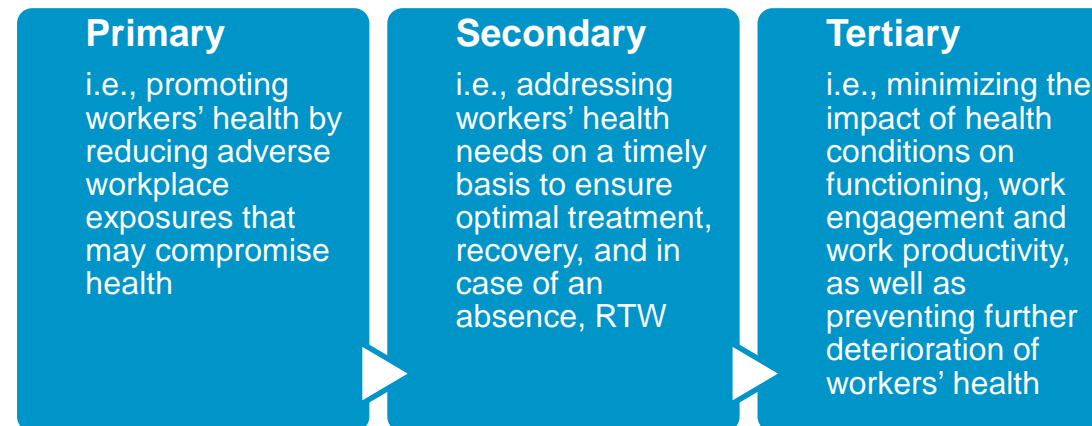
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Worker: A person employed by an organization or a person under the day-to-day control of the organization, whether paid or unpaid, which includes workers, supervisors, managers, leaders, contractors, service providers, volunteers, students, or other stakeholders actively engaged in undertaking activities for the benefit to the organization.



Work Disability Prevention

- Health needs of workers should be addressed proactively, before the onset of work disability
- Proactive prevention versus reactive responses can ensure minimal disruption in workers' engagement and work productivity, workplace relationships, and workers' personal lives
- WDM may include **accommodating workers in order to prevent unnecessary absences, or early and safe RTW when health absences occur**
- Prevention efforts are best framed as a **continuum from primary to secondary through to tertiary prevention**
- WDM may also be framed as a continuum in terms of managing worker health over their time with the organization



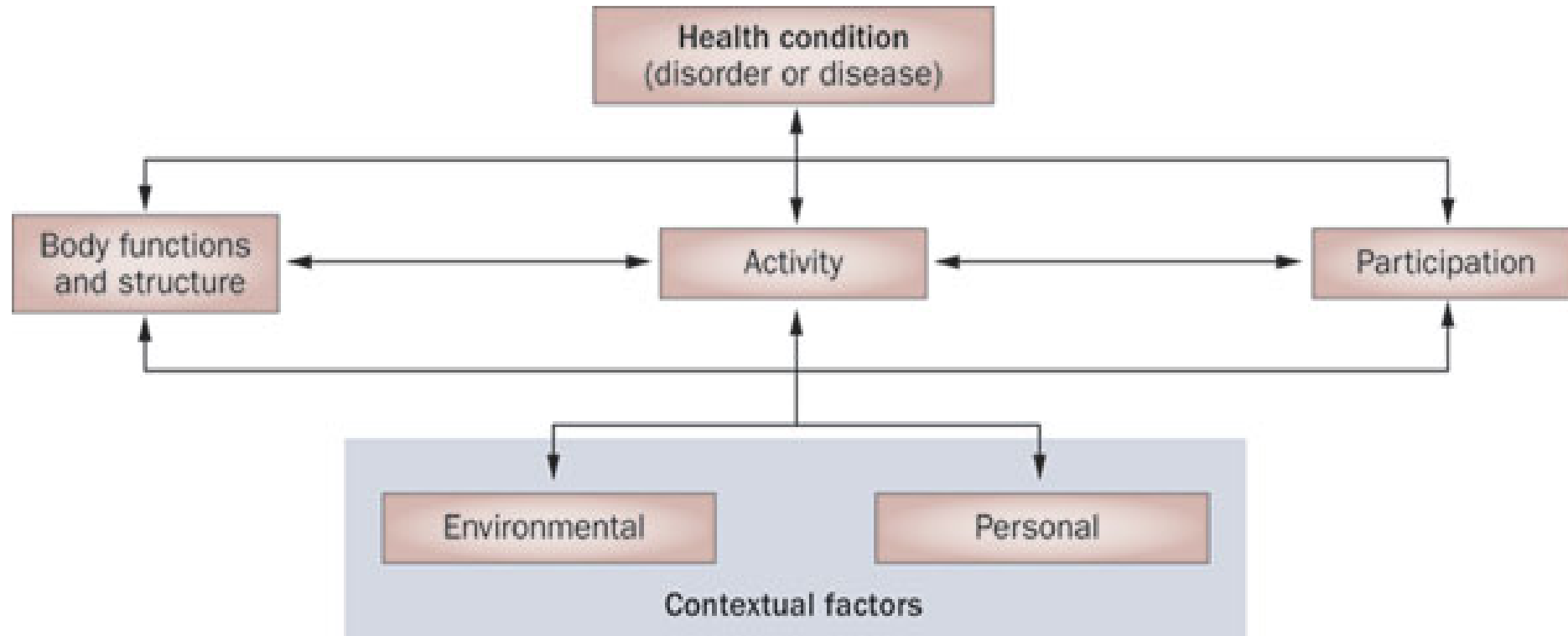
Guiding Principles that are the Foundations for this Standard

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 (RTW) 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)

NB: The standard is voluntary and is intended to serve as guidance that is over and above the minimum requirement

Biopsychosocial Approach to Health

Biopsychosocial approach: Takes into consideration the associations between biological, behavioural, physical, psychological, and social factors that create the disabling condition/situation. **Contextual factors a key considerations.**



Life Course Perspective

Disability management may also be framed as a continuum in terms of managing worker health over their time with the organization, from recruitment, hiring, and on-boarding, through to job continuity and advancement, and even to eventual departure (exit) from the organization.

Recruitment and Hiring	On-boarding	Continuity and Advancement	Employment Exit
Individual factors <ul style="list-style-type: none"> • Education • Community relationships • Worker preferences • Work experiences • Physical ability • Cognitive ability • Psychological resilience 	Preparation of job task and design <ul style="list-style-type: none"> • Cultural socialization • Readiness and fitness for work 	Experience during time with organization <ul style="list-style-type: none"> • Individual support • Change management • Time management • Stress management • Work-life balance • Accommodation • Injury/illness/disease • Ongoing fitness and work performance • Episodic absences • Leaves of absence • Education • Career development • Continuing education • Skills development • Job displacement (related to business changes) 	Organizational considerations <ul style="list-style-type: none"> • Obligations of duty to accommodate • Provision of guidance/assistance • Assurance of no discrimination
Job Posting <ul style="list-style-type: none"> • Location and environment • Posting means • Essential demands 	Review and address barriers <ul style="list-style-type: none"> • Access and egress • Ergonomic/functional • Cognitive • Psychological 		Pension Financial support
Assets to community	Selection <ul style="list-style-type: none"> • Accommodation • Orientation and training of new workers 		Referrals and rehire assistance Vocational support
Organizational Factors <ul style="list-style-type: none"> • Person-job fit • Inclusive by design • Flexibility of business • Organizational culture • Work environment 	Reviewing <ul style="list-style-type: none"> • Fit and comfort of job tasks 		

Generalizeability

- This Standard is adaptable to the specific context of an organization, and is applicable to organizations of any size, private or public, for profit or not for profit, operating in any sector and in any jurisdiction in Canada
- Based on the idea that WDM is a strategic and dynamic process, integrated into overall business practices and other aspects of a management system
- Considers both physical and mental health needs of workers
- The Standard provide the “what”
- Implementation is the “how”
- Some implementation tips are provided in an annex

Contents and Annexes

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1 Scope

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Core Sections

4 Work disability management system

5 Planning

6 Implementation

**7 Performance Monitoring, Evaluation,
and Continual Improvement**

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

Topics Covered Within Core Sections*

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

*Subject to change until release of the Standard

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- Implement Work disability

Ensure Foundations are in Place

7 Performance

- Training, a
- Managing

7 Performance continual improvement

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The WDM System is a framework that involves key stakeholders such as senior management, front line managers and supervisors, internal subject matter experts/disability management specialists, healthcare professionals, and workers and their representatives/unions.

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- Monitor and management
- Internal audit
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- Management
- Continual improvement

Identify Targets

The planning process is necessary to review current internal and external practices and resources, identify existing gaps, establish objectives and targets appropriate for the organization, and develop an action plan to achieve them.

*Subject to change until release of the Standard

Topics Covered Within Core Sections*

4 W

- Implementation with an orderly and well-thought-out plan is essential to the success. The organization will need to closely monitor the initial roll-out to quickly identify any potential problems or gaps in the system and address those problem areas in a timely fashion.
- Identify gaps, barriers and opportunities in internal policies, procedures, practices, programs, and resources
- Set objectives, targets, and establish an action plan

Implement Changes

6 Implementation

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- *Monitoring and evaluating enables the organization to identify successes, opportunities to intervene, reduce risks, and increase efficiencies. It should be appropriate to the size and nature of the organization and its WDM System. Both qualitative and quantitative methods are used.*

5 P

Monitor, Evaluate and Correct if Needed

6 Implementation

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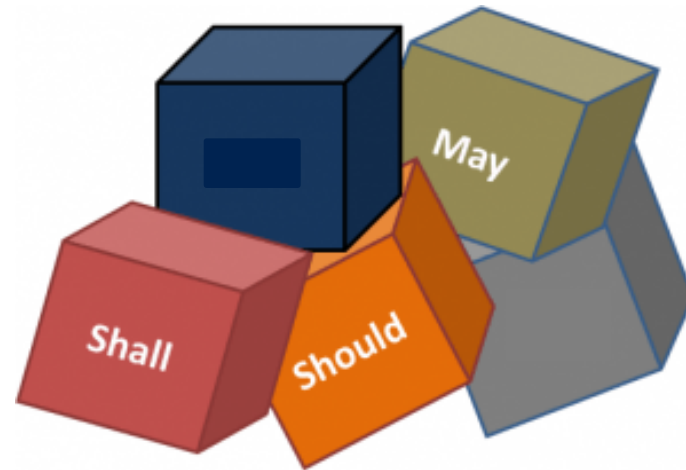
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Terminology

- In the Standard, the term “shall” is used to express a requirement, i.e., a provision that the user is obliged to satisfy in order to comply with the Standard
- Term “should” is used to express a recommendation or that which is advised but not required
- Term “may” is used to express an option or that which is permissible within the limits of the Standard



Expected Outcome

- Improved organizational performance in operations and human resources
- Shorter sickness absences, reduced turnover, increased productivity
- Effective engagement of workers and other stakeholders
- Advanced supervisor, manager, and HR personnel skills and performance in addressing health needs of workers as they arise
- Increased employer capacity to address obligations under human rights/disability inclusion legislation at the provincial/territorial and federal level (i.e., increased disability confidence)
- Enhanced public profile for employers who adopt the Standard
- Improved productivity and competitiveness of the Canadian labour force

New Canadian standard proposed for work disability prevention management systems

October 17, 2019 (Toronto, Ont.)—A proposed new national standard from CSA Group on work disability prevention management systems is now open for public review and feedback, with the final publication of the standard expected in the spring of 2020. The director of the Centre for Research on Work Disability Policy (CRWDP), Dr. Emile Tompa, chaired the CSA Group Technical Committee behind the standard.

To be known as CSA Z1011, *Workplace Disability Management System*, the draft standard offers standards of excellence and guidelines to help organizations in the hiring, onboarding, retention, management and return to work of people with occupational and non-occupational disabilities. As such, it will be a companion to CSA Group's current management standards on quality, environment, workplace health and safety and risk management systems.

An estimated 22 per cent of adults in Canada—more than 6.2 million individuals—have a disability ([Statistics Canada, 2017](#)). And every year, tens of thousands of Canadians become disabled and are unable to work, thereby becoming excluded from the numerous health advantages of workforce participation. The costs of disability take a staggering toll on workers and their families, as well as on employers and taxpayers. According to the International Labour Organization (ILO), the economic burden due to disabilities in Canada is estimated to be between 6.7% to 8.7% of the country's GDP ([ILO, 2009](#)).

Launch of the Standard

- Launch event planned for April 2020
- Possibly a daylong symposium
- Hosted by the key partners – CSA, CRWDP, Conestoga College
- Presentations by key stakeholders– organizations, labour/unions, workers' compensation
- Question and answer session



Research Program

- Plans to undertake a research program following release of the Standard
- Evaluate uptake and impact of Standard in different organizations
- Process evaluation, effectiveness evaluation, economic evaluation



Prospect

- Canada to be the first country to develop a national standard in this area
- Sets a precedent for other countries and international standard bodies (i.e., International Organization for Standardization – ISO)
- Timely given recent federal developments – Accessible Canada Act, Canadian Accessibility Standards Development Organization
- Plan to investigate possibility of developing an ISO standard based on CSA Z1011



OHS Standards



**OCCUPATIONAL
HEALTH & SAFETY**



**CSA
Group**

175+ standards | 50% referenced in legislation/regulations

Personal Protective Equipment
OHS Management Systems
Machinery and Equipment
Construction Safety
Workplace Electrical Safety

Emergency Management
General Workplace Safety
Mining
Ergonomics
Transporting Dangerous Goods



Questions/Discussion

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