DRAFT
Final Report

60 Summits: Montana

Stakeholder Summits on Preventing Needless Work Disability by Helping People Stay Employed

April 20-25, 2008

Billings	Great Falls	Missoula
April 20th-21st	April 22nd-23rd	April 24th-25th

Executive Summary

Background

In 2006, Montana began to take a serious look at its workers' compensation system after a study showed that its premium rates were among the highest in the nation. Among the several key findings of the subsequent Workers' Compensation Study Project was an unusually high duration of lost time following injury. On December 1, 2006 Commissioner Keith Kelly of the Montana Department of Labor & Industry (DLI) created the Labor-Management Advisory Council on Workers' Compensation (LMAC) whose purpose is to evaluate the findings by the Workers' Compensation Study Project, identify problems with Montana's workers' compensation system, and recommend solutions.

While Montana was exploring specific solutions to improve the performance of its workers' compensation system, the American College of Occupational & Environmental Medicine (ACOEM) adopted a paper entitled *Preventing Needless Work Disability by Helping People Stay Employed* as a guideline in May 2006. Dr. Jennifer Christian led the committee of 21 US and Canadian physicians who developed it. She founded The 60 Summits Project shortly thereafter for the purpose of propagating the ideas in the paper throughout the US and Canada. To date, nine states have held at least one Summit each, Montana among them, and this report presents the history, proceedings, and outcomes of Montana's participation in The 60 Summits Project.

In January 2008, the LMAC resolved to convene a series of workshops conducted in partnership with The 60 Summits Project that would provide a forum for statewide discussion among key stakeholders using the ACOEM work disability prevention guideline as a conceptual framework. The overarching goal was to develop broad statewide consensus among stakeholders on both general principles and specific ideas for ways to reduce the average time injured Montanans spend away from work.

Planning Process and Design

A 13 member multi-stakeholder Executive Planning Committee was formed and supported by an internal planning group within the Montana Department of Labor & Industry, Employment Relations Division (ERD). Calling their initiative 60 Summits: Montana, the group agreed to hold workshops in Billings, Great Falls, and Missoula during the week of April 20 – 25, 2008. The Committee identified specific desired outcomes for attendees, namely that they would:

- Come to see how communication (or the lack of it) among all stakeholders affects medical and employment outcomes;
- Develop a greater awareness of others' concerns and perspectives;
- Learn ways to communicate better, reduce hassles, and improve results; and
- Leave with new relationships and several concrete ideas and strategies to improve the stay-at-work and return-to-work (SAW/RTW) process in their own organizations, business relationships, communities, and Montana as a whole.

The guest list was hand-picked and balanced to assure a good mix of stakeholder groups. Attendees were nominated based on their expertise and community standing. All told, about 250 people participated in the workshops, including invited guests, speakers, and the production team most of whom traveled from city to city.

Each of the workshops was a two-part affair, beginning the late afternoon of the first day and continuing the next morning. The meetings began with a video introduction featuring Lt. Governor John Bohlinger, then welcoming remarks from a local elected official and an LMAC member. Next, Dr. Christian delivered the keynote presentation. After the keynote, participants sat with their

assigned workgroups to get to know one another during dinner. Before leaving for the evening participants received instructions for what to expect the next day.

Eight workgroups were each assigned at least one of the16 specific recommendations made in the ACOEM guideline. Their charge was to decide whether the recommendations should be implemented, and if so, how to do so. Their challenge was to agree on strategies that would help to make the recommendations become common practice, and on concrete first steps to take in order to start carrying out those strategies. In addition, participants were asked to make commitments to themselves for what actions they were personally going to take and record them on special forms.

At the start of the second day Dr. Christian reviewed the day's instructions, then each workgroup met with a specially trained facilitator in two breakout sessions, first to deliberate and develop an initial report and then to refine it. After each breakout session, a spokesperson for each workgroup presented their report to all attendees in a general session and received feedback from Dr. Christian. During the closing session, Dr. Christian summarized the general themes that had become apparent during the day and discussed potential next steps with the group.

Outcomes

Overall, the attendees in all three cities thought the ACOEM recommendations should be implemented, sometimes with minor changes in language. Shared themes and commonalities among the action plans became apparent as the workgroups gave their reports. Similarly, these themes also appeared in the personal promises and plans that people made for themselves.

The major themes that emerged during the day are summarized below, and some include specific examples. See Appendix D for the detailed action plans of each workgroup.

1. Throughout Montana people should implement the recommendations laid out in the ACOEM work disability prevention guideline. Many of the action plans and personal commitments made during the workshops reflect the realization that there are concrete opportunities for improvement in the attendees' own organizations and business relationships as well as within associations and other types of communities.

2. Ongoing multi-stakeholder engagement will best support system change. Many workgroups expressed a desire to continue working together as well as with other workgroups to forward their joint action plans and the public process. Many individuals made similar plans.

3. Get the word out to support this culture change and achieve buy-in. Action plan items include:
    - Present the workshop findings at the 2008 Governor's Conference on Workers' Compensation and Occupational Safety & Health (Governor's Conference);
    - Develop and disseminate consistent messages using social marketing and PR campaigns to change how people think, develop a positive mind-set, and obtain buy-in;
    - Use a variety of communication channels, ranging from 1:1 conversation to presentations, brochures and public service announcements; and
    - This begins at home in our own organizations.

4. All stakeholders who deal with workplace injuries – especially workers, employers, and healthcare providers – need basic information, background concepts, and skills. Action plan items include:
    - Set up an education task force;
    - Mail copies of the ACOEM work disability prevention guideline to all stakeholders; and
    - Workplace training and formal educational conferences.

5. Increased consistency is required, and can be achieved through standardization and the use of protocols and templates. Action plan items include:
    - Develop a one page electronic form with separate and secure access for stakeholders;
    - Develop a one page paper form that can convey RTW information to all parties;
    - Use an assessment form to screen for and document potential barriers to RTW; and
    - Use checklists and protocols to assure completeness and guide the process.

6. Better / easier / faster communication and two-way information exchange among stakeholders with a problem-solving approach is critical. Action plan items include:
    - Ask about and describe work abilities instead of restrictions;
    - Employers need to communicate to employees and physicians that temporary work adjustments are possible; and
    - People need guidance, not just information, and they need it just in time.

7. Consider a program like Project Help in Washington state.

8. Develop an employee (or all stakeholder) bill of rights and responsibilities.

One of the intended purposes of 60 Summits: Montana was to garner written commitment from participants to join with the State and the LMAC to form an on-going group that will work together over time to carry out the strategies and action plans identified during the workshops. At the end of each of the three workshops, participants were asked to complete evaluations and indicate the extent of their desire for on-going engagement with one another and The 60 Summits Project. Overall, the attendees were satisfied with their experience and want to remain engaged with one another and the overall initiative (Appendix F).

Next Steps

The 60 Summits: Montana 2008 workshop series was a strong first step in a truly innovative grassroots initiative to shift the way that people think about work disability – and the way stakeholders interact with each other as they respond to the situation created by a worker's injury or illness.

The relationships that were established and the action plans and personal commitments that were made during the workshops must now be transferred to the real world and carried out. The people in each stakeholder group will benefit from on-going dialogue, encouragement, and assistance in order to turn their plans into realities.

The challenge now is to establish a structure that will support the fulfillment of the action plans and commitments. The ERD is in the early stages of development of a public-private, not-for-profit cooperative effort – WorkSafeMT Foundation – which is the umbrella organization tasked with creating and implementing a strategic plan to address the outcomes of these workshops and change the workers' compensation system and culture in Montana. Information will be posted on ERD's webpage http://erd.dli.mt.gov/ and the WorkSafeMT website www.worksafemt.com which is currently under development. Also, refer to Montana's page at www.60Summits.org for updates.

The 2008 Governor's Conference will have specific presentations on the 60 Summits: Montana workshops and final report and on other SAW/RTW topics.

Approximately half of the 250 attendees wish to be part of the Montana follow-up action group(s) and they are listed by city in Appendices C-1: Billings, C-2: Great Falls, and C-3: Missoula.