

## Information Resource Sheet No.3

# MANAGER'S ASSESSMENT CHECKLIST FOR MANAGING A WORKPLACE WITH A PERSON WITH A LIFE- THREATENING ILLNESS

### Introduction to manager's assessment checklist

#### A management framework

This checklist provides a framework to assist a Managing Director, senior manager or Human Resource manager to assess their workplace's capacity for managing the diverse factors impacted by a person with a life-threatening illness.

#### Fostering cooperation

The checklist is intended to foster the cooperation and participation of those responsible for managing production, occupational health and safety, health promotion and human resources needs in the work organisation. It is suggested the Managing Director, senior manager or Human Resource manager include the relevant manager(s) for each area identified in an assessment meeting.

#### Assessing relevance, capacity, resources, and conflicting needs

The points listed are provided as a guide to some of the issues a workplace may need to consider in managing an ill person at work. In using this checklist, managers are encouraged to:

1. Assess whether the point is relevant to your situation.
2. Assess your capacity to manage the issue.
3. Assess what resources you may need in addition to your existing resources to manage the issue.
4. Identify where there may be conflicting needs, and assess the strategies and resources for resolving them.

### Production issues

- Attention to inter-office communication to ensure smooth transitions with staff on other shifts.
- Capacity of the ill person to carry out all their usual tasks, and the organisation's capacity to provide support to meet any diminished capacity.
- Suitability of work equipment for the ill person to continue to work.
- Need to renegotiate contractual obligations with business clients when the ill person has a key role in meeting production requirements.
- Need for succession planning, and options for staff development, secondment, or recruitment to meet this need.
- Revised quality control for situations where services provided may be affected by the person's illness (e.g., loss of concentration).

- Consider the impact on business cash flow of the person's illness.
- Consider reallocation of the ill person's tasks and spread work load.
- Process for monitoring the trajectory of the person's illness in relation to its impact on production peaks and troughs.
- Provide information on person's illness to clients to ensure continuity and smoothness of communication with them.

### **Occupational health and safety issues**

- Assess the need to provide support to the ill person with work tasks to minimise occupational health and safety risks.
- Assessing the impact on work colleagues' work load due to reduced physical capacities caused by the person's illness.
- Consider the need to assess and/or reorganise or modify the physical environment to ensure work continues to take place in a healthy and safe environment.
- Consider the need to establish a process to identify emerging risks for all parties due to changes in the person's capacity caused by their illness.
- Identify the areas of individual, group, or workplace cultural resistance to acceptance of the person's illness, and assess the present and future risks caused by this behaviour, attitudes and values.
- Identify the particular needs associated with the person's illness.
- Assess the needs for privacy of the ill employee both at work and home.
- Identify existing policies and work practices that may need to be modified to maintain a safe and healthy work environment for the ill person.
- Assessing the impact on managers and work colleagues' emotional well-being due to their relationship to the ill person, or due to life experience with illness and/or death.
- Consider the need for support for the manager(s) most involved in meeting the ill person's needs.
- Assess the needs for information and training for managers and work colleagues to provide the necessary emotional, information and appraisal support to all parties.

### **Health promoting care issues**

- Attention to providing a supportive environment for all parties to respond to the physical, emotional and work performance changes caused by the person's illness and/or treatment.
- Attention to the interaction between work and home of the ill person and the potential for mutual support.
- Attention to workplace social activities that may support an ill person.

### **Human resource management issues**

#### Workforce planning

- Considering greater flexibility in the ill person's work rosters.
- Accepting the need to change some work tasks, and ensure changes are negotiated according to existing protocols.

- Attention to inter-office communication to ensure smooth transitions with staff on other shifts.
- Succession planning.
- Ongoing ability to negotiate changes in work roles and tasks due to changes in the ill person's health status.

#### Performance management

- Manager/supervisor clarifies their level of responsibility for managing the ill person and the impact on staff work loads and roles with senior management.

#### Health assessment

- Opportunities for staff to use individual interviews/discussion with supervisors/managers, or written contributions from staff listing their concerns. Employees need to be encouraged to identify their concerns, fears, ideas, skills and experiences dealing with a life-threatening illness, as a basis for developing a strategy for promoting staff and organisational health. Consider the way gender shapes the identification of concerns, and the options for an effective health promoting strategy.
- Consider the need for a protocol for assessing the health of an ill person and ensuring their fitness for work.

#### Privacy

- Protecting the ill person's need for privacy.
- Maintain appropriate boundaries to protect the identity and dignity of the ill worker.

#### Rehabilitation (and illness management)

- Providing information to the workforce about the existence of a human resource policy for managing the employment, work performance and rehabilitation of a staff member with a life-threatening illness.
- Maintain employment opportunity during illness for ill worker.
- Consider the appointment of a colleague/manager as advocate to assist the ill person raise issues of concern to them at work.
- Flexibility with return to work rosters and rest breaks for the ill person.
- Manager establishes their authority to act with their senior management, including payment of leave entitlements and availability of resources for staff training and support services.
- Manager establishes a protocol with the ill person on providing information to staff about the ill person's needs.
- Inform the workforce on management's response to the ill person's situation and staff needs. Encourage open communication.
- Inviting the ill person to staff meetings.
- Maintain identity of ill person as valued team member.

### Employee assistance

- Access to Employee Assistance Programs or counselling support for managers and staff affected by the ill person's illness.
- Provision of mentoring for a manager responsible for managing the ill person's work.

### Disputes

- Use of existing workplace dispute resolution procedures to address disputes arising from impact of person's illness on work roles, work relations and work performance.

### Training

- Training sessions on the specific illness and its possible/likely trajectory.
- Consider training in developing staff support for understanding and responding to the impact of a life-threatening illness on the ill person, staff colleagues, and one's self.

### Payroll

- Ensuring payment of leave entitlements.