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ABSTRACT

Disabilities and illnesses are becoming an increasing problem for all employers. To understand the problems unique to schools, 76 elementary and middle school principals were surveyed and indepth interviews were conducted with over a dozen of them. Nearly 70 percent reported that, over the past 2 years, they had between 1 and 5 teachers absent for more than 2 weeks at a time each; 77 percent reported having 1 to 5 administrative staff out. Clustering survey responses according to a disability management framework results in the following strategy: (1) declare that the first goal is return to work; (2) develop a cooperative strategy; (3) provide early and continued intervention; (4) talk to physicians and insurers; (5) provide job accommodation; and (6) help colleagues, students, and parents understand and be sensitive to the total situation. Four information groups that can help with job accommodations for an employee with a chronic illness or disability are listed. (MLF)

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HERE'S HOW

NATIONAL ASSOCIATION OF ELEMENTARY SCHOOL PRINCIPALS

When Illness and Disability Strike Your Staff

Elise Lipoff

As we move closer to the year 2000, the median age of the American population—including elementary school principals and teachers—will continue to rise. The Bureau of Labor Statistics estimates that the median age of our labor force will be 38.9 years in the year 2000. That's more than three years higher than it is now. There's no doubt about it: Our society is "getting older."

This demograph trend has serious implications for the American workforce in general—and for America's *education* workforce in particular. For example, the aging of the population—our increased life expectancy—means that older people can and do remain on the job longer. In addition, as we personally experience the roller-coaster ride of our deregulated economy, we think about staying on the job as long as possible beyond the current retirement age of 65 for economic reasons as well as for reasons of health and psychological well-being.

Unfortunately, the aging process has a number of "costs" of its own. As people age, they are more likely to incur a variety of disabilities, such as arthritis, heart conditions, and various kinds of cancer.

Chronic disabilities and illnesses, therefore, are becoming an increasing problem for all employers—schools included. Over the past 25 years, the number of people who were or had become severely disabled between the ages of 17 and 44—crucial years for anyone's career—has increased by 178 percent. While the majority of people with disabilities want to work, the fact is that most disabled Americans are *not* working. Even though an overwhelming number had been employed prior to becoming disabled, far too many have not been brought back into the active workforce either in their old jobs or in new ones.

Clearly that situation is going to change for the following three reasons:

First, more older people are insisting on staying on the job.

Second, the government is stepping up the enforcement of federal and state laws giving people with disabilities the right to go back to work.

And third, it is becoming more and more expensive for employers, such as schools, to recruit and hire replacements for disabled staff.

To get an idea of how those three developments are affecting today's elementary and middle schools, the National Association of Elementary School Principals (NAESP) sought the counsel of the Institute for Rehabilitation and Disability Management (IRDM), part of the Washington Business Group on Health.

Over the years, the IRDM has helped a number of large and small corporations adopt the concept of "disability management" as an approach for bringing disabled employees back to work as soon as possible. The NAESP felt that the Institute's experience with small, white-collar service businesses might be transferable to the world of elementary and middle schools. The NAESP's questions intrigued us and we took the assignment.

What Is a Disability Anyway?

Before going much further, we ought to define our terms: "disability," for example. The generally accepted definition of a "disability" is this: It is an injury or illness that has occurred on the job or off and will keep the employee out of work for more than two weeks. A disability can range from diabetes and chronic back pain to cancer and quadriplegia.

We at IRDM say we are committed to the idea of "managing disability."

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What does that mean? It means we are committed to helping employers in the private and public sectors manage their workforce—through the use of good plans, programs, policies, services, and techniques—such that an illness or disability will have as little an impact as possible both upon the individual employee and upon the total work environment.

We are certain that many of the lessons already learned in the private sector (some at great cost) can be readily applied to public schools (at little or no cost). But we also know that there are many problems unique to schools.

In order to better understand both the similarities and the differences, we surveyed 76 elementary and middle school principals and carried out in-depth interviews with over a dozen of them. Nearly 70 percent reported that, over the past two years, they had between 1 and 5 teachers absent for more than two weeks at a time each because of a disability or health condition; 77 percent reported having 1 to 5 administrative staff out for the same reasons.

While the great majority of these principals seem to be operating on the basis of a strong personal ethic and good managerial instincts, we have clustered their responses according to a disability management framework that might be found in the private white-collar service sector.

Most of the responses also dealt with situations involving teachers and other instructional personnel; that's understandable, since teachers comprise 90 percent of the public school workforce. While we refer to "teachers" throughout most of this article, the management strategies discussed here apply just as well to any academic, administrative, or classified employees of your school.

Goal One: Return to Work

Until recently, most teachers who incurred chronic or permanent disabilities were given little encouragement to return to work.

In the past ten years, however, employers in general, and a growing number of school districts in particular, have begun to change these short-sighted policies. Today, when a teacher incurs a disability, it is becoming increasingly likely that the school—and that means the principal—will become involved and encourage the teacher to return to the classroom as soon as possible. Principals are also becoming more inclined to make accommodations in work schedules, task levels, the work environment, and so on, in order to accommodate the teacher when he or she does return to work. These changes help the teacher, but they also reduce the school's personnel costs and its insurer's benefit costs.

Misplaced Compassion

But let us be very clear on one point: If a teacher is unable to return to work under *any* circumstances, then, of course, that person should retire with disability income. Those kinds of cases are not for discussion here. But many principals still feel that a teacher with a chronic illness or disability has somehow earned the "right" to retire onto disability—even if that teacher can, in fact, return to work with some kind of assistance.

Such a teacher is not being well-served by his or her principal but has instead become the object of the principal's misplaced compassion. And in such cases there is usually a price to pay—and the teacher pays it. As we all know, a teacher who retires onto disability will have to adjust to a decrease in income, a lower standard of living, and a very real possibility of a lower quality of life for that teacher and his or her family.

In order to shield a teacher with a disability from the consequences of a reduction in income, a principal should do whatever is possible to bring that person back to work at the school. Principals who have successfully dealt with such a situation tell us that their best ally was actually the individual teacher. This shouldn't be surprising, since the overwhelming majority of teachers are committed, career professionals who are already highly motivated to return to work.

Researchers at Columbia University and Michigan State University have found that, ironically, the question of a teacher's returning to work is less likely to be answered by a strictly medical diagnosis of that teacher's disability but is more likely to be influenced by the principal's attitude and the accommodations willingly made by everyone in the school. Many principals told us they felt it was "the humanitarian thing to do" to bring back their teachers or other staff personnel with chronic illnesses or disabilities. They saw it as a way of keeping their school "family" together. This attitude—more realistic and more truly compassionate—is vital to the process of bringing a teacher with a disability back to career and classroom.

Helping disabled teachers return to work can involve some of the trickiest negotiations and sensitive decisions that any principal will ever make. The right strategies can help disabled teachers retain or advance their careers, improve the morale of the school staff in general, and can save the school district enormous sums in the costs of benefits, recruiting and retraining, and long-term medical care.

The Cooperative Strategy

One of the basic strategies in disability management is simply this: Have all parties work together. One principal told us that starting out with a good "corporate culture" will insure the success of this strategy. This cooperative strategy requires that the principal, the teacher, the district's central office personnel, and the district's insurance carrier keep open their lines of communication to and among each other.

District-level staff can be valuable resource people because of their experience handling these kinds of cases in schools elsewhere in the district. Without violating confidences, they can nevertheless compare the situation with one of your teachers with earlier, similar situations elsewhere and apply the lessons learned form those earlier situations. One principal said he was able to bring a teacher back to work with help from the superintendent. In another school district a contact person in the central office routinely gives advice and assistance to principals regarding these matters.

Early and Continued Intervention

One of the most important principles in disability management is early and continued intervention. And it should begin at once. Within the first few days of a teacher's absence, the principal or other official school representative should contact that teacher—and should *stay* in regular contact throughout the entire absence. This should not be regarded by either teacher or principal as any sort of intrusion; rather, it is a way of letting a teacher know that, first and foremost, he or she is missed. Secondly, frequent personal contact provides the support and encouragement a teacher needs to get up the strength or courage to go back to work.

Contact need not be exclusively face-to-face. One principal, for example, mailed copies of the school's weekly "Monday Morning Memo" to ill or housebound teachers and followed up with a personal (voice or in-person) contact once a week. This is just one of many simple but effective ways to maintain contact with a teacher who is out.

From the very beginning of the intervention process, it is very important to set a specific back-to-work date. Even if the date is later changed—and it most likely will be—it is nevertheless important for the principal, the teacher, and the attending physician to have a target date to aim for.

One school has a wellness committee which appoints one person to stay in contact with an absent school employee. The contact person is also concerned with smoothing the way for the employee to return to work.

Experienced principals also agree that you just cannot be "Mr. Nice Guy" throughout the episode. Some employees—temporarily overwhelmed or demoralized by what has happened—are afraid to focus on the future or are, at best, ambivalent about their careers. One of the key contributions of the principal during early intervention is to *stand* for—and *speak* for—the future and to give as realistic an assessment as possible of what is happening to the school program in the teacher's absence. It may sound self-serving, but it is nevertheless the truth as you, the principal, see it.

PROFESSIONAL ADVISORY

This issue of *Here's How* is in support of the following *Standards for Quality Elementary and Middle Schools* (NAESP: 1990, Revised): LEADERSHIP (the principal's values, beliefs, and personal characteristics inspire people) and SCHOOL CLIMATE (encourages the capabilities and emphasizes the worth of individuals). It is also in support of the SUPERVISORY PROFICIENCY (helps people achieve their full potential), as given in *Proficiencies for Principals* (NAESP: 1986).

Talk to Physicians, Insurers

It is important to be a constructive communicator, that goes without saying. But don't limit yourself to communications only with your absent teacher. As soon as possible—and of course with the teacher's permission—you should approach the physician of record and the insurer in order to establish mutual trust and confidence and to agree on a process for staying in close communication.

In some instances, the elementary school principal must go the extra mile and be a facilitator, bringing all the involved parties together to work out answers to some questions affecting a disabled teacher.

Also, no one expects a school principal to be an expert in such areas as insurance coverage, physical disability, infectious disease, or tort law. Yet, depending on the cause of a teacher's absence, a principal may need to have reliable information about any of these or of other equally sensitive areas in order to realistically plan on the teacher's return to work or—if it comes to that—the teacher's retirement on disability.

The insurance carrier may assign a case manager to arrange for appropriate treatment as well as help facilitate the teacher's eventual return to work by advising on what modifications to make to the building, the classroom, the work schedule, and so on. But it is equally important for the principal to advise insurance case managers, physicians, therapists, and others about the reality of the school environment and the real physical and emotional requirements of a particular position on the school staff.

Job Accommodation

So far, we've just touched upon the whole area of "job accommodation," but that is perhaps the most important component of disability management. Now, since the passage of the Americans with Disabilities Act (ADA) of 1990, every school—public or private, supported or not supported by federal funds—must accommodate an employee who incurs a disability. The ADA regulations are currently being written and, when completed, they will explain more clearly the legal requirements for job accommodation.

These are the kinds of changes that a school may need to make, in order to accommodate a staff person with a chronic illness or disability:

- Changes in the physical environment: *e.g.*, putting in a ramp to make a classroom wheelchair-accessible or simply ordering a chair designed to support a bad back
- Changes in job requirements and job expectations: *e.g.*, relieving a teacher of playground duty, rearranging or reducing committee assignments, retraining a teacher for an administrative position
- Changes in job schedules: *e.g.*, bringing a teacher back on a part-time basis and building up to full-time, working out flexible schedules to mesh with special transportation or therapy schedules.

A number of national organizations can help you think through the kinds of job accommodations that might be needed for an employee with a chronic illness or disablility. Here are four of the more prominent information groups in the field:

Job Accommodation Network, (800) 526-7234

U.S. Chamber of Commerce, (202) 463-5533

Easter Seals (202) 347-3066

President's Committee for Employment of People with Disabilities (202) 653-5044

Are Colleagues Sensitive, Too?

The elementary or middle school principal is important to the whole pro-

cess of bringing back a school employee. But the principal can't do it alone. A returning teacher or other school employee must have the understanding of his or her colleagues, whether or not job accommodations are necessary. If, however, some kind of accommodation is needed, it is absolutely vital that the returning teacher have the understanding and support of his or her colleagues.

In addition, if an employee is returning to the workplace with a recognizable disability, colleagues need to understand and be sensitive to the total situation. Naturally, this means that the teacher must also be willing and able to talk about his or her particular illness or disability. This might not be easy and, again, the principal might need to reach out for help from the insurance case manager, physician, or rehabilitation counselor.

What is true for colleagues on the staff is equally true for students and parents as well. They, too, should be made sensitive to the particular teachers's illness or disability.

For everyone on staff, the return to work of a school staff person with a chronic illness or disability is an important double lesson:

First, it teaches everyone the lesson of human fragility, an aspect of the human condition that we all share.

Second, it teaches that we *all* need—and have a moral right to expect—kindness and consideration from one another, certainly in the event of a significant illness or disability but actually *regardless* of illness or disability.

Finally, a few words of advice from principals who have successfully handled the return to work of a chronically ill or disabled employee:

Helping a disabled teacher come back to work eliminates the expensive recruitment and training process for the replacement—providing that one can be found. It also shortens the length of time you will need to employ expensive substitute teachers. And, of course, it reduces or avoids the disruption to the staff, students, and parents that usually accompanies the departure of an experienced teacher and the arrival of a replacement.

"How to Handle Illness and Disability Among Your Staff"

Don't miss the special panel session on this issue at the NAESP Annual Convention and Exhibition at Anaheim, California. Featured panelists are three principals with on-line experience handling personnel with chronic illnesses and disabilities:

Laura Toups (Miller Wall Elementary, Marrero, LA)
Bernard F. Creeden (Spofford Pond School, Boxford, MA)
Paul Crookston (Creekview Elementary, Price, UT).

At the Convention Center, Tuesday morning, April 9, from 8:30 to 10:00 a.m. (Moderated by Ted Cron, NAESP Associate Executive Director for Communications.)

Bring your questions . . . Share your ideas

Here's How is published six times during the school year by the National Association of Elementary School Principals as a service to its members, the on-site managers of the nation's elementary and middle schools. Send manuscripts to Editor, *Here's How*, NAESP, 1615 Duke Street, Alexandria, Virginia 22314. Single copies of *Here's How* are $2.50; bulk orders (10 or more copies) are $2.00 each. Virginia residents should add 4.5% sales tax. *Please specify the date and title of the particular* Here's How *you are ordering.* Checks are payable to NAESP and should be sent to Educational Products, NAESP, 1615 Duke Street, Alexandria, Virginia 22314. PAYMENT MUST ACCOMPANY ORDER.

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