



2024

**Workers' Compensation
Insurance Seminar**

saif Work.
Life.
Oregon.

**A consistent safety and health approach:
enhancing the customer experience**

Agenda



Historical Overview



Professional Consulting Series (PCS)

Core Tenets
Group activity



Strategic Alignment of Workflow (SAW)

Recommendations, Correspondence,
and Snapshot Assessments

Historical overview



SAIF supports professional development and education



20 years of data – most common request: consulting skills



Gap: needed a standardized consulting curriculum and consulting approach



Data analyzed by an outside consultant

The result...

Professional Consulting Series (PCS)

Developed in-house

- **Debra Ringold**, JELD-WEN Professor of Free Enterprise and Dean Emeritus Atkinson Graduate School of Management, Willamette University
 - Judi Croft, Safety Services Manager
 - Mary Ann Potter, Corporate Trainer
 - Paula Jones, Regional Safety & Health Manager

Professional Consulting Series (PCS)

Personal Efficacy – *listen for the outcomes policyholders value and connect to effective safety and health alternatives*

Persuasion on the merits

- Preparation, Humble Inquiry, and Effective Alternatives

Don't let the perfect be enemy of the good

- Incremental successes, patience and persistence, develop program change over time

Behavioral change is our objective

- Meaningful behavioral change can lead to the **impact** we desire

Professional Consulting Series (PCS)

Dealing with Resistance – *reduce policyholder resistance by genuinely appreciating their priorities and constraints while being demonstrably committed to their organization's success*

Policyholders must see the ROI associated with your efforts

- Preparation, Humble Inquiry, and Improving Organization Performance through S&H change

Negotiate using the alternatives you offer

- Give the policyholder choice among useful alternatives

Never blame the policyholder

- We have not compelled on the merits if we don't achieve success

Impact NOT Activity

- Maintenance vs. meaningful behavioral change

Professional Consulting Series (PCS)

Achieving Engagement and Commitment – *both policyholders and consultants share responsibility for both successes and failures*

Network “Up”

- Active pursuit vs. passive acceptance

Make a compelling case for change

- Develop an implementation plan and see it through to completion

Hold yourself and the policyholder accountable for keeping commitments

- Meaningful behavioral change can lead to the **impact** we desire

Authenticity means investing in the considerable work necessary

Small group discussion (5 min)

Think of a time when there was a **significant safety issue** identified at one of your policyholders.

- Where have you used one of the PCS principles?
- Which one did you use and how did it help?
- What other PCS principles could you use?

What are SAW & PCS?

Strategic Alignment of Workflow and Professional Consulting Series.
This work will help SAIF make progress on our vision to make Oregon the safest and healthiest state.



Benefits for agents and policyholders

1. Consistent approach for consulting with greater respect for values and goals of the policyholder
2. Clear, direct, concise correspondence
3. Follow-up on impactful recommendations
4. Easier for policyholders, agents, and underwriting to see the progress by a policyholder on recommendations

Issuing and tracking impactful recommendations

- ✓ Provide policyholders with professional guidance on focus areas to prevent injury and illness
 - Facilitate meaningful safety and health improvements
 - Learn what makes a difference to shape future efforts

- ✓ Provide underwriting with information to support sound pricing practices

Track progress on recommendations that make a difference.

SEVERITY	PROBABILITY				
	LOW				HIGH
HIGH	PROFESSIONAL JUDGEMENT	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP
	PROFESSIONAL JUDGEMENT	PROFESSIONAL JUDGEMENT	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP
	NO FOLLOW-UP	NO FOLLOW-UP	PROFESSIONAL JUDGEMENT	TRACK AND FOLLOW-UP	TRACK AND FOLLOW-UP
	NO FOLLOW-UP	NO FOLLOW-UP	NO FOLLOW-UP	PROFESSIONAL JUDGEMENT	TRACK AND FOLLOW-UP
LOW	NO FOLLOW-UP	NO FOLLOW-UP	NO FOLLOW-UP	NO FOLLOW-UP	PROFESSIONAL JUDGEMENT

Example 1

Subject line: 456777 ABC Stage Company: Follow-up



Safety and Health Services

Dear Jane,
Thanks for meeting on September 5th to discuss the organization's progress with safety and health initiatives. Included are the action items we discussed and committed to completing.

Recommendations and Commitments:

Action item: Pre-Task Planning

Implement (design, train to and ensure utilization) a pre-task planning process for all stage managers, staff and support for load in/load out days encompassing the scene shop and Armory stages.

Target date: November 22, 2023

Action item: Baseline Audiograms

Determine an audiogram provider and schedule a baseline audiogram for employees in your Hearing Conservation Program. Although Oregon OSHA requires employers to obtain a baseline audiogram within 180 days of employment (and then at least annually) when a HCP is required, SAIF recommends obtaining a baseline audiogram at hire.

Target date: November 6, 2023

Additional information/Resources

When you and Stanley develop the pre-task plan, ample samples are available off the web but one of my favorite resources is Harvard University's: [APPENDIX A – PROJECT SUBMITTAL LIST \(harvard.edu\)](#).

It would be good time to ensure your rigging crew's training and certification are current as well. Please let me know if you need rigging training providers.

I'll plan to follow-up in December. If I can be of assistance prior, please contact me.

Sincerely,
Jan

cc: Underwriter: Barry Gordon
Agent, Ken Johns

Jan Roberts CSP (she/her)

SAIF Sr. Safety Management Consultant
541.338.6723 | F: 503.584.9169 | 800.285.8560
3500 Chad Dr., Suite 200, Eugene, OR 97408

This report is advisory only. It may not list all existing hazards. SAIF assumes no responsibility for correction of conditions identified as hazardous. Safety remains your responsibility.

Policy number and meeting topic in subject line

Brief greeting including when the meeting occurred and the topic

May include links or resources

Closing statement. Include planned follow-up

For each, include recommendation title, and target date.

May include suggestions where no follow-up is planned

Example 2

Subject line: 456777 ABC Stage Company: Follow-up



Safety and Health Services

Dear Jane,
Thanks for meeting on September 5th to discuss the organization's progress with safety and health initiatives. Included are the action items we discussed and committed to completing.

I will plan to follow-up in December. If I can be of assistance prior, please contact me.
Sincerely,
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Brief greeting including when the meeting occurred and the topic

Closing statement. Include planned follow-up

Policy number and meeting topic in subject line

When recs are given, reference the attached PDF

Example 2: Sample attachment

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Safety and Health Services Recommendation and commitment summary

Prepared for
ABC Theater Company

October 16, 2023

SAIF policy: 499434
Policy period: July 01, 2021 to July 01, 2022

Presented by
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Regional Safety-health Supervisor
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C: SAIF UW Barry Gordon
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Working alongside policyholders to make Oregon the safest and healthiest [state](#)

This report is advisory only. It may not list all existing hazards. SAIF assumes no responsibility for correction of conditions identified as hazardous. Safety remains your responsibility.

400 High St SE | Salem, OR 97312 | P: 800.285.8525

ABC Theater Company

October 11, 2023

Action item: Pre-task planning	Target Date: November 22, 2023
Implement (design, train to and ensure utilization) a pre-task planning process for all stage managers, staff and support for load in/load out days encompassing the scene shop and Armory stages.	

Action item: Hearing Conservation Program roll out	Target Date: November 6, 2023
Hearing conservation program: The safety committee has been discussing how to implement the recommendations made following the 2019 noise sampling. Identifying the audiology provider for exposed employees, educating on exposures and hearing loss prevention, providing appropriate hearing protection and ensuring its use are simplified action items. Please let me know what assistance is needed for these steps.	

Additional information/resources
When you and Stanley develop the pre-task plan, ample samples are available off the web but one of my favorite resources is Harvard University's: [APPENDIX A – PROJECT SUBMITTAL LIST \(harvard.edu\)](#).

It would be good time to ensure your rigging crew's training and certification are current as well. Please let me know if you need rigging training providers.

|

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Address policyholder's needs

Correspondence can vary from above:

- Policyholder contact **wants a detailed summary** of the meeting because key decision maker wasn't in attendance
- Policyholder asks for hazard walk-through with a **detailed list** of everything noted

Small Group Discussion (5 min)

Think of a time when there was a significant safety issue identified at one of your policyholders.

- What was the issue and what was one action you took to help them address the issue?
- What are some ways agents and SAIF staff can partner to help a policyholder improve?

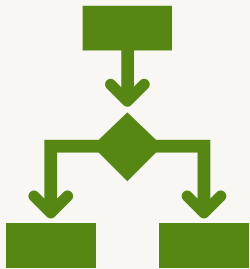
Snapshot Assessment

The purpose of the snapshot is to assess the policyholder's safety and health management systems and identify trends and opportunities through the data collected.

Part one: Safety program diagnostics

Assessment of a policyholder's safety program across 3 categories:

Business operations



Safety program elements



Employee training and education



Examples of snapshot questions

- Is there a process for reporting and analyzing near misses or close calls?
- Are periodic safety and health inspections conducted?
- Are PPE assessments conducted?
- Is CPR/AED training provided to employees?

Snapshot 7-year vision

Current

Future

Phase 1

Standard form

Snapshot Assessment_ >

- Respondent Information
- Business operations
- Safety Program
- Employee Training
- Professional Observations

Foundational data collection with basic output functionality

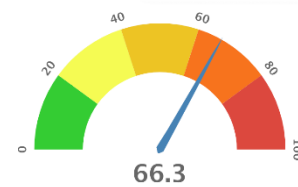
Phase 2

Industry specific add-on questions

Healthcare
Construction
Agriculture
Manufacturing
Food and Bev
Logging

Phase 3

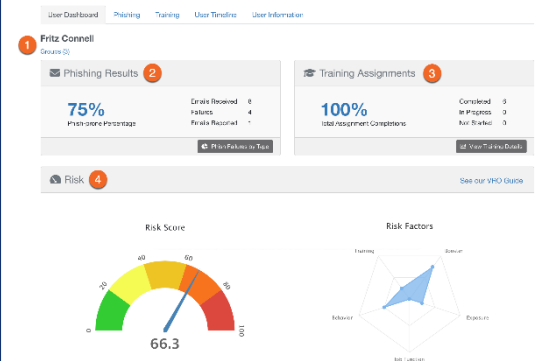
Weighted scoring



Weighted score leveraging Snapshot answers and recommendation status

Phase 4

Comparative analytics dashboard



Fully integrated policy and claims data with industry comparisons

What is your one word take away from this session?

saif Work.
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