Building the Case for Accommodation Programs
Session EMP-006

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Topics

• Workplace Accommodation Best Practices
• The Need for Innovation
  – Four Key Innovation Areas
• Workplace Innovation @ IBM
• Building a Business Case
  – Setting Innovation Goals
  – Gathering Business Case Data
  – Determining Potential ROI
  – Making the Business Case
• IBM Can Help Companies Innovate
• Summary
Building the Case for Accommodation Programs

Workplace Accommodations Best Practices
What is a Workplace Accommodation?

- A modification or adjustment to a job, the work environment, or the manner in which duties are accomplished
- Enables a worker with a permanent or temporary disability to perform the essential functions of a job, and be competitively productive
- Can be both public (e.g. standards-conforming ICT) and personal (e.g. assistive technologies, services, etc.)

<table>
<thead>
<tr>
<th>Type of Accommodation</th>
<th>Example</th>
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<tbody>
<tr>
<td>Ergonomics</td>
<td>Chairs, Mice, etc.</td>
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<tr>
<td>Hardware (Non-Standard)</td>
<td>Displays, Headsets, Keyboards</td>
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<tr>
<td>Software (Non-Standard)</td>
<td>Magnifiers, Voice Reco, Readers</td>
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<td>Site</td>
<td>Alert Systems, Physical Access</td>
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<tr>
<td>Services</td>
<td>Captioning, Admin Help, Interpreters</td>
</tr>
<tr>
<td>Job</td>
<td>Work Loc, Schedule, Job Adjustment</td>
</tr>
<tr>
<td>Mobility</td>
<td>Scooters, Special Rental Cars, etc.</td>
</tr>
<tr>
<td>Other Medical</td>
<td>Fatigue, Dexterity, etc.</td>
</tr>
</tbody>
</table>
Best Practices: Disability Diversity Advantage

- Workforce diversity can provide competitive advantage when ...
  - Diversity is both horizontal and vertical
  - Diverse perspectives influence strategy and execution
  - Marketplace reach and effectiveness improve

- Gaining the advantage requires that PwD are always ...
  - *Effectively accommodated* so ...
  - *Competitively productive* so ...
  - *Advanced* based strictly on contribution so ...
  - *Well-represented* in all ranks of the organization so ...
  - *Meaningfully influencing* business strategy and execution so ...
  - *Improving market reach* and effectiveness.
Best Practices: Meeting Diversity Objectives

Diversity Objective

*Harness unique powers of diversity to create a smarter workforce - ultimately, a Smarter Planet, for all*

- Enable PwD competitive productivity with comprehensive/effective accommodations
  - Part of ensuring PwD equal opportunity to advance and contribute

Consistent, Global Implementation

Public Accommodations

- Well-defined accessibility standards supported by training and tools
- Accessibility integrated into planning, procurement, development, and communications
- Required annual EO training for all employees

Personal Accommodations

- Holistic accommodation approach:
  - Considers techn, environment, job role
  - Multi-disciplinary teams (line management, HR, medical, IT, legal, real-estate ops, etc.)
- Costs charged at division, not dept level
- Separation of duties in accommodation processes (decisions owned by HR, not line management)
Best Practices: Measuring Success

- Example measures used to determine success of employment programs:
  - Hiring, retention, advancement rates
  - Standards conformance measurements (e.g., % compliant applications, buildings, etc.)

- Enables well-managed programs to make incremental progress

- But does not provide insight into the person’s view of barriers and their causes
The Need for Innovation
Need for Innovation: Challenges

- **Understanding accommodation challenges**
  - Difficult due to privacy requirements, individual sensitivity, cultural variations
  - Can be biased by the views of the vocal few
  - True barriers to PwD productivity are not fully understood

- **Studying the problem**
  - Targeted, anonymous surveys of PwDs – e.g. IBM reached 300+ PwDs in 23 countries
  - Focus groups – e.g. IBM leveraged our IBM Diversity Network Groups
  - In-depth studies – e.g. IBM conducted enterprise-wide studies performed by experts using virtual teams like IBM Academy of Technology
Need for Innovation: IBM Survey Findings

- In spite of strong accommodation policy and programs, IBMers believe their competitive productivity has been hampered by under-accommodation
  - A global challenge
  - More significant in areas outside North America,
  - some parts of Europe / Japan

- Causes:
  - Excessively time consuming for PwD & Mgr to ...
  - Understand accommodation policies and processes
  - Identify who is responsible for helping with various issues
  - Identify most appropriate accommodation solutions
  - Find or hire expert advice
  - Order, install, and configure
  - Inappropriately low expectations of PwD productivity
  - PwD concerned about being perceived as a burden
  - Keeping accommodations current seen as too risky and/or too costly
Need for Innovation: Process Issues

- In enterprises, accommodation processes are often...
  - **Locally executed** with wide variation in methodologies and outcomes
  - Highly dependent on **undocumented knowledge**, skills and experience acquired by passionate and dedicated few individuals
  - Hampered by **inconsistent** understanding of organizational responsibilities
  - Based on phone and e-mail communications that pose **privacy risks** and make issues difficult to track
  - Difficult to improve because process performance metrics and reports could only be **compiled manually**
  - **Lacking a feedback mechanism** to measure effectiveness from PwD perspective
### Need for Innovation: Four Key Areas

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hiring &amp; Retention</strong></td>
<td>When employee accommodations are not comprehensive and optimally effective, retention rates can be lower</td>
</tr>
<tr>
<td><strong>Employee Productivity</strong></td>
<td>When the accommodations process is not defined, inefficient, unclear or confusing productivity rates of employees who require accommodations – and the team members who participate in the process – are lower</td>
</tr>
<tr>
<td><strong>Government Penalties &amp; Fines</strong></td>
<td>Inadequate hiring and retention rates for employees with disabilities can result in companies having to pay higher quota-related fines to various governments</td>
</tr>
<tr>
<td><strong>Health Insurance</strong></td>
<td>Higher rates of employees on short or long-term disability, or worker’s compensation, can result in higher overall costs in health insurance</td>
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</table>
Accommodations Innovation @ IBM
Innovation @ IBM: Integrated Process & Tool

<table>
<thead>
<tr>
<th>Process Transformation</th>
<th>Process Supported by Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Simplifies</td>
<td>▪ Steps users through process</td>
</tr>
<tr>
<td>▪ Hides necessary complexity from PwDs/Mgrs</td>
<td>▪ Manages teams</td>
</tr>
<tr>
<td>▪ Makes globally consistent</td>
<td>▪ Protects privacy</td>
</tr>
<tr>
<td>▪ Integrates with other business processes</td>
<td>▪ Builds/manages global solution portfolio</td>
</tr>
<tr>
<td>▪ Establishes clear responsibility/accountability</td>
<td>▪ Enables proactive support</td>
</tr>
</tbody>
</table>

PwD/Manager

Web Application

• Single, simple, global, personalized point-of-entry
• Automated workflow mgmt

Human Resources
Biz Transformation & I/T
Accessibility Center
Finance
Procurement
Local Management
Country Management
Vendors

Back-End Accommodation Processes
Innovation @ IBM: Accessible Workplace Connection

- One-stop self-service portal helps employees manage workplace accommodation requests
  - Centralized, consistent process
  - Improves efficiencies in request management, team assignments, communication, decision making
  - Powerful catalog with many accommodation types
  - Used for new accommodations, accommodation changes, and support/maintenance requests
  - Optional reporting module helps companies analyze and manage workplace accommodations
  - Automated email notifications, team handoffs

- **Does not replace existing processes/systems for:**
  - Fulfillment or procurement of accommodations
  - Electronic medical records storage
  - Inventory management

IBM AWC helps people who need accessibility assistance and their managers to acquire and effectively use accommodations that enable them to be competitively productive while also safeguarding the privacy of information about their personal situation and needs.
Innovation @ IBM: AWC Scope

- **Focused on basic capabilities**
- **Objectives:**
  - Simple way to acquire/support accommodations
  - Eliminate process confusion
  - Global consistency
- **Accommodation request is centerpiece of new process (2 types):**
  - Request for accommodations
  - Request for support
- **Objective is to ensure accommodations are:**
  - Reasonable
  - Comprehensive
  - Effective
Innovation @ IBM: AWC Screen Shots

Welcome to IBM Accessible Workplace Connection

Workplace accommodations or adjustments need to be in place in IBM to be productive, regardless of abilities. IBM Accessible Workplace Connection assists individuals with disabilities and their managers in identifying accommodations that enable them to be productive and also safe guarding the privacy of information and needs.

Get started
Learn about available accommodations and how to make an accommodation request.
1. What is an accommodation and how do I request it?
2. Who is eligible for an accommodation?
3. What is the process for getting an accommodation?

Accommodation
Use the AWC to connect with colleagues and seek accommodation for any of the following conditions:
• You are getting accommodations for the first time
• Updating your accommodations because
• Updating your accommodations because they have changed

Alerts and notifications
You have 0 requests requiring your action
You currently have no active requests

Create a new accommodation or get help with an existing accommodation.

Choose from:
• Accommodation
• Categorize
• Search

Portlet

Requestor

Request Administrator

Process Administrator
# Innovation @ IBM: AWC Request Process

<table>
<thead>
<tr>
<th>Draft Request</th>
<th>Initial Team Formation</th>
<th>Assessing Needs</th>
<th>Acquiring Solutions</th>
<th>Evaluating Solutions</th>
<th>Closed Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>User chooses reason, describes problem. Optional: add draft solutions from catalog</td>
<td>Request admin reviews request, modifies default staff assignments suggested by system. Team membership grants access rights.</td>
<td>Solutions added to request from catalog. Each solution is reviewed, discussed, and approved or rejected.</td>
<td>Solutions are ordered, delivered, installed &amp; configured. Request administrator updates progress of each solution in system.</td>
<td>PwD uses, evaluates, provides feedback and solutions are dispositioned. Inadequate solutions return processes to assessing needs.</td>
<td>When all needs are met, request administrator closes request. All team members lose access except PwD and process admin (super user).</td>
</tr>
</tbody>
</table>

**Solution was not adequate**
Innovation @ IBM: AWC Supports Multiple Roles

• Process & Request Administrators
  • Process Administrator
  • Backup Process Administrator
  • Request Admin/Team Lead
  • Backup Request Admin/Team Lead
  • Other Accommodation Team Members

• Requestors & Managers
  • User for whom a request is made
  • User who drafted a request
  • Requester's Manager

• HR Partners
• Medical Case Workers
• Legal Representatives

• Accommodations Specialists
  • IT Accommodations Specialist
  • Site Accommodations Specialist
  • Services Accommodation Specialist
  • Mobility Accommodations Specialist
  • Ergonomics Accommodations Specialist

• Portfolio Managers (Catalog Managers)
  • IT Accommodations Portfolio Manager
  • Site Accommodations Portfolio Manager
  • Services Accommodation Portfolio Manager
  • Mobility Accommodations Portfolio Manager
  • Ergonomics Accommodations Portfolio Manager
  • Medical Accommodations Portfolio Manager
  • Accommodations Catalog Entry Owner

* HR – Human Resources
Building a Workplace Accommodations Business Case
Business Case: Key Steps

- **Step 1**: Setting Innovation Goals
- **Step 2**: Gathering Business Case Data
- **Step 3**: Determining Potential ROI*
- **Step 4**: Making the Business Case

To achieve innovation, it is necessary to build a business case. This will help outline the potential concrete returns on the investments of time and resource that will be required to plan and implement the innovation, so the enterprise can realize the larger benefits.

*ROI – Return on Investment*
### Business Case Step 1: Setting Innovation Goals

<table>
<thead>
<tr>
<th>Category</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hiring &amp; Retention</strong></td>
<td>Employees are better accommodated, resulting in higher retention rates, and potentially lower hiring / re-training costs</td>
</tr>
<tr>
<td><strong>Employee Productivity</strong></td>
<td>The accommodations process is better defined, more efficient, more clear and less confusing, so productivity rates of PWD employees and team members who participate in processes are higher</td>
</tr>
<tr>
<td><strong>Government Penalties &amp; Fines</strong></td>
<td>Adequate or improved hiring / retention rates for PWD employees can result in companies having to pay less quota-related fines to various governments</td>
</tr>
<tr>
<td><strong>Health Insurance</strong></td>
<td>Potentially lower rates of employees on short or long-term disability, or worker’s compensation, can result in lower overall costs in health insurance</td>
</tr>
</tbody>
</table>
## Business Case Step 1: Example Innovation Goals

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hiring &amp; Retention</strong></td>
<td>Reduce attrition rate of PWDs relative to non-PWD employees to support diversity objectives.</td>
<td><strong>GOAL: Reduce PWD attrition rate from 5% to 3% higher than non-PWD employees</strong></td>
</tr>
<tr>
<td><strong>Employee Productivity</strong></td>
<td>Make the accommodations process more consistent and efficient by measurably improving employee productivity for PWD employees and others working the process.</td>
<td><strong>GOAL: Increase productivity by 38%</strong></td>
</tr>
<tr>
<td><strong>Government Penalties &amp; Fines</strong></td>
<td>Reduce the overall amount of fines paid to governments as a result of penalties for non-compliance.</td>
<td><strong>GOAL: Reduce fines by 25%</strong></td>
</tr>
<tr>
<td><strong>Health Insurance</strong></td>
<td>Reduce the overall costs for short term and long term Worker’s Comp insurance payouts through better accommodation of employees.</td>
<td><strong>GOAL: Reduce costs by 15%</strong></td>
</tr>
</tbody>
</table>
### Business Case Step 2: Gather Business Case Data

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Key Data Points</th>
<th>Business Goals</th>
</tr>
</thead>
</table>
| **Attrition** | ▪ Average base salary – All employees  
▪ No. of PwDs Employees – US/Global  
▪ Current attrition (%)  
  ➢ All employees  
  ➢ PwD employees | ▪ Future attrition (%)  
  ➢ All Employees  
  ➢ PwD employees |
| **Productivity** | ▪ Average current hrs / accommodation  
  ➢ PwDs,  
  ➢ Managers,  
  ➢ Medical/HR, Other  
▪ Number currently completed / year | ▪ Average future hrs / accommodation  
  ➢ PwDs,  
  ➢ Managers,  
  ➢ Medical/HR, Other  
▪ Number to be completed / year (future) |
| **Fines** | ▪ Current fines paid  
  ➢ Americas (NA, CA, LA),  
  ➢ Europe, Asia/Pacific,  
  ➢ All other geos | ▪ % reduction of government fines to be realized from implementing accommodation innovations |
| **Health Insurance** | ▪ Average current / futures costs / case  
  ➢ Short term, Long term, & Workers Comp  
▪ Average No. of current cases / year  
  ➢ Short term, Long term, & Workers Comp | ▪ % reduction of short term, long term, & workers comp cases to be realized as result of implementing Accessible Workplace Connections (AWC) |
## Business Case: Determining Potential ROI

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Current Cost / Yr</th>
<th>Est. Savings / Year</th>
<th>Future Cost / Yr</th>
<th>Year 1 Est. Savings</th>
<th>Year 2 Est. Savings</th>
<th>Year 3 Est. Savings</th>
<th>Year 4 Est. Savings</th>
<th>Year 5 Est. Savings</th>
<th>Total Est. Savings</th>
</tr>
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<tbody>
<tr>
<td>Attrition</td>
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<td>Productivity</td>
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<td>Fines</td>
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<td>Health Insurance</td>
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<td>Subtotal</td>
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<td>Invest Innovation Tech</td>
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<td>Invest Staff</td>
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<td>Est. ROI</td>
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</table>

This table is an example of the potential ROI outlined against the four key areas of accommodations innovation value. This is modeled after how IBM built its own business case and work with clients.
Business Case Step 4: Making the Business Case

1. Create compelling presentation on innovation potential
   - Integrated process, organizations and tools
   - Business case/ROI
   - Summary of benefits that can be realized including "classic" soft benefits e.g., marketing, patents, customer support, etc.

2. Socialize innovation potential among stakeholders:
   - HR Diversity, Medical, Legal, etc.
   - Engage people in key roles if they exist (e.g. process admins, request handlers, Diversity Networks, medical case managers, ergonomics, facilities, ICT accessibility, etc.)

3. Engage credible external thought leaders and consultants
   - For example, IBM offers a “Phase 0” Consulting Service focused on process, organization, and tools innovation strategy

4. Secure stakeholder and executive commitment
IBM Can Help Enterprises Innovate
IBM is Commercializing AWC for Clients

- Internal IBM innovation in process of commercialization
- IBM Hosted Software-As-A-Service (SaaS)
  - Least disruptive, quickest deployment
  - Similar to other outsourced HR / Benefits software
  - Secure interfaces to customer enterprise HR reference data, employee directory, email (SMTP)
  - Integration with single sign-on, privacy, security to customer intranet environment
- Required Services
  - Phase 0 AWC Assessment Services
  - Phase 1 AWC Configuration Services
  - Phase 2 AWC Deployment Services
- Optional additional services
  - IBM Cognos Reporting Modules
IBM: AWC Client Offering Phases

Phase 0: AWC Assessment

Assess Fit of AWC & Build Business Case

- Conduct interviews and review current state
- Document accommodation current state (As-Is Report)
  - Process, Organization, Accommodation Types, Technologies
- Develop to-be state
  - Process, Organization, Accommodation Types, Technologies
- Develop implementation plan
- Develop business case

Phase 1: AWC Configuration

Develop Custom AWC Configuration

- Change management support (for to-be state changes to orgs, process, accommodation types)
- Define and validate requirements
- Create detailed architecture & technical specs
- Design external interfaces
- Customize AWC application
- Define and prepare training and education materials
- Develop AWC testing and deployment plans

Phase 2: AWC Deployment

Deploy & Support Customized AWC

- Change management support
- Prepare testing and production environments
- Develop secure external interfaces to customer data
- Conduct testing
- Conduct training and education
- Deploy customized AWC into production environment
- Provide application support
- Plan future enhancements (including reporting)
**IBM: Phase 0 Helps Clients Assess Fit of AWC**

### Phase 0 Assessment

#### Assess Fit of AWC & Build Business Case

- **Average**
  - 3-4 months duration
  - 400-500 hours
  - 2 IBM consultants

**In a Phase 0 AWC Assessment Services engagement: IBM assesses the customer’s organizations, processes, accommodation types and technologies against the IBM benchmark / best practice.**

### Organizations

- **Core**
  - Process Owner (e.g. HR Diversity, Health / Disability)
  - ERGs
  - Accommodation Portfolio Managers
  - Enterprise I/T & Services
- **Fulfillment**
  - Requestors & Managers
  - Accommodation Specialists
  - Medical Case Workers
  - Medical Clinicians
- **Supporting**
  - HR, Legal, Procurement
  - Union (Optional)

### Processes

- **Core**
  - Process Ownership & Management
  - Process Administration
  - Portfolio Management
  - Request Creation
  - Request Management
- **Fulfillment**
  - Request Fulfillment
  - Medical, HR, Legal and optional Union Review of Requests
- **Supporting**
  - Procure and install accommodations
  - Train / support requestors

### Accommodation Types

- Assistive Technologies
- Non-Standard IT SW & HW
- Building or work space adjustments
- Ergonomics equipment
- Accessibility Services
- Job Adjustments
- Mobility
- Other Medical Accommodations

### Existing & Strategic Technologies

- Conduct Interviews & Review Current State
- Document Current State (As-Is Report)
- Develop To-Be State & Implementation Plan
- Develop Business Case
- Deliver Final Report
Summary
In Summary

• **Workforce diversity can provide competitive advantage** but companies must make sure employees are effectively accommodated and competitively productive

• **A consistent, global implementation** of public and private accommodations is imperative in order for to realize this advantage

• **An integrated process supported by Accessible Workplace Connection** is helping IBM innovate

• **A innovation business case can be developed to outline potential business value in four areas** (retention, productivity, government fines, healthcare costs)

• **IBM is commercializing Accessible Workplace Connection** to help other companies innovate
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