

# Facilitating The Interactive Process

For Employers and Employees when Medical Conditions Arise



 **RELATIONSHIPS AT WORK**  
Dispute Resolution Services

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*The Mindset Doc*

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# STATEMENT OF WORK & PRICING SHEET for 2022-2025

SERVICE	INCLUSIVE OF THE FOLLOWING	2022-2025 RATE*
<p><b>The Interactive Process Meeting (IPM)</b></p>	<ul style="list-style-type: none"> <li>• Pre-IPM set-up, scheduling, communication via interim email phone, and/or video conferencing (0.25 hour)</li> <li>• Pre-IPM Documentation Review (0.25 hour)</li> <li>• IPM Facilitation (1.5 hours)</li> <li>• IPM Summary Report (1.5 hours)</li> <li>• Services provided in excess of flat rate billed at \$300*</li> <li>• Services delivered via ZOOM or MS Teams Video Conferencing</li> </ul> <p><b>NOTE:</b> On-site meetings available upon request. Travel billed separately from flat rate.</p> <ul style="list-style-type: none"> <li>• <b>NOTE:</b> IPMs cancelled 24 hours or less incur a cancellation fee of \$300*.</li> </ul> <p>*Reduced rates are available for San Diego &amp; Imperial County JPA Members and approved affiliates; contact <a href="#">Dr. Dupree</a> for details.</p>	<p>\$900* per IPM</p>
<p><b>Hourly Rate Services</b></p>	<ul style="list-style-type: none"> <li>• Additional Meeting time in excess of flat rate (3.5 hours)</li> <li>• Completion of <b>DWC Notice of Offer</b> on behalf of Employer   Claims Administrator for work-related medical conditions</li> <li>• <b>Correspondence to Medical Providers</b> with customized questionnaires for resolution of accommodation issues</li> <li>• Coordination of <b>Fitness for Duty (FFD)</b> evaluations</li> <li>• Extended <b>Consultative Meetings and/or Research</b> on issues</li> <li>• <b>Travel time and expenses</b> for in-person IPMs</li> </ul>	<p>\$300* per hour</p>
<p><b>Training</b></p>	<p><b>Training</b> is available in the following customized formats to meet your needs:</p> <ul style="list-style-type: none"> <li>• 1-hour, 2-hour, half-day, and full-day training</li> <li>• Delivered on-site or via ZOOM</li> <li>• PROFESSIONAL DEVELOPMENT for Administrative Assistants and Site Administrators</li> <li>• REASONABLE ACCOMMODATION training for Supervisors, Managers and Administrators.</li> <li>• LEADERSHIP DEVELOPMENT for emerging leaders</li> </ul>	<p>Pricing varies with duration of training.</p>
<p><b>Job Descriptions and Job Analyses</b></p>	<p>Development of detailed <b>job analyses</b> and <b>updated job descriptions</b>.</p>	<p>Pricing varies with scope of project</p>
<p><b>Dispute Resolution Services</b></p>	<p><b>Workplace Mediation   Facilitated Dialogue   Restorative Process   Conflict Coaching</b> services to address difficult situations, challenging / toxic employees team conflict and challenged working relationships.</p>	<p>Pricing varies with scope of services</p>



## Easy Access...Easy Implementation

Visit <https://relationships-at-work.com/tip/>

### Here's what you'll find:

- 1) Access a [narrative overview](#) of the laws involved and what happens at the interactive process...how to get started with a 4-step process to follow. *Available in English and Spanish.*
- 2) A [10-minute video](#) that explains the interactive process. Something to share with your colleagues, employees and supervisors who participate in the process or help manage the process. *Available in English and Spanish.*
- 3) Schedule a [pre-IPM phone call](#) to discuss the upcoming IPM or make arrangements to meet 15 minutes prior to the start of the IPM to familiarize with the issues and concerns presented by the employee's medical condition.
- 4) Use the [easy, online scheduler](#) to find a time that works for you. Complete a short questionnaire to provide needed information, upload the employee's job description, medical documentation, and 'leave' history.

NOTE: Services are delivered via ZOOM Video Conferencing – instructions for access provided during the scheduling process. On-site IPMs available only upon request.

- 5) Sample **forms available** upon request:
  - a TIP Online: a guide to share participants new to the process with tips on the optimal environment for participating via ZOOM and an overview of the meeting structure.
  - b Flowcharts to guide you in the process.
  - c Checklist and Sample Letters to Get Started with the Interactive Process
  - d Sample Chronological Medical | Leave History Template
  - e Employee 'Consent to Exchange Medical Information' Form
- 6) [SUBSCRIBE to 'Decoding the Conflict Mindset'](#) – a twice-monthly podcast with breaking news from 'Thought Leaders' and Subject Matter Experts (SMEs) about tips and strategies on leading and managing employees in conflict.
- 7) [SUBSCRIBE to our Podcast with Felicia and Debra: 'Hot Topics in the Workplace: When Medical Conditions Flare Up'](#) where 'hot topics' are discussed that impact employers and employees when medical conditions impact the ability to 'be at work, stay at work, and perform the work.'
- 8) [Let's Talk](#) to discuss 'training' and 'professional development' opportunities for you and your administrative and management staff. Many accommodation missteps happen at the frontline of supervision. Train your Principals, Assistant Principals and Management Staff on how to effectively respond to the impact of medical conditions on 'being at work, staying at work, and performing the work' and how to involve you early on. As part of your annual professional development requirements, consider training for your administrative staff on effective workplace communication and conflict management strategies.



## Dr. D's BACKGROUND

### OVERVIEW:

**Dr. Debra Dupree** is a Workplace Mediator, Workforce Management Consultant, International Trainer and Keynote Speaker with 30+ years of experience. She started her career as a Vocational Rehabilitation Counselor (CRC) specializing in employees/employers with work-related medical conditions. With the advent of the Americans with Disabilities Act (ADA) in 1990, she advanced her skills as a Certified 'WINDMILLS' Trainer (disability awareness training), Certificated Mediator (CM), Certified Ergonomic Evaluation Specialist (CEES), and a Certified Professional in Disability Management (CPDM)

She provides organizational consultation on employee-management relations, work climate studies to uncover the sources of work place conflict, professional development training opportunities in leadership and team-building, workshops on disability and reasonable accommodation practices, and dispute resolution strategies. Debra has an extensive training and conflict management background, training leadership and legal/mediation professionals throughout North America in workplace mediation and conflict management strategies. She was rated in the top ten trainers globally by SkillPath Corporate Strategies' workshop participants, and is an active member of the American Arbitration Association Employment Mediation Panel and its training faculty.

### CLIENTELE:

Her clients include a range of public and private entities at the local, state and federal level as well as national and international entities. Examples include:

- the San Diego County Office of Education Joint Powers Authority
- the Department of Navy - Southwest Region
- County of Imperial
- Imperial Irrigation District
- Imperial Valley Housing Authority
- Cal Poly: Pomona, San Marcos, Sacramento, and Fullerton
- the Port of San Diego
- Honeywell
- Qualcomm
- Boeing
- Eastern Municipal Water District
- Helix Water District
- Hewlett Packard
- SkillPath Corporate Strategies
- and many more.

### AUTHOR | TRAINER | SPEAKER:

Her books "Uncovering the Psychology of Good Bosses vs. Bad Bosses and What It Means for Leadership" and I Hate My Boss...OOPS, I AM the Boss are based on her many years of mediation

experience, workplace training and intervention, and doctoral level research. She has authored numerous [articles](#) and three eBooks to date:

- [Building a Courageous Workplace Culture](#)
- [The Emotional Hijack: How to Keep Your Cool When Your Brain is on Fire](#)
- [Your Emotional Potential: How You Show Up Matters](#)

She successfully launched and facilitated the **Trilogy Workshop Series on Navigating the Interactive Process in 2018**, now available through [online self-study](#).

She hosts the monthly Podcast: '[Hot Topics in the Workplace: When Medical Conditions Flare Up](#)' with San Diego JPA Representative Felicia Amenta. Dr. D also hosts the twice-monthly podcast called '[Decoding the Conflict Mindset](#)' featuring 'Thought Leaders' from multiple disciplines worldwide.

### **DISABILITY & MEDIATION BACKGROUND:**

#### **Vocational Assessment & Disability Management Certifications:**

1986: Certified Rehabilitation Counselor (CRC) & Licensed Marriage & Family Therapist (LMFT)

1990 & 2000: Certified Ergonomic Evaluation Specialist (CEES)

1990: Certified Case Manager (CCM) & Windmills Certified Professional in Disability Awareness

1997: Certified Professional in Disability Management (CPDM)

2002: Certified as a Woman-Business Owned Enterprise (WBE)

2005: Advanced Practitioner in Workplace Mediation (AP)

2008: Certified High Conflict Diversion Professional (Psychological Disabilities)

2010: Certified Conflict Coach (Manager-Employee Relations)

### **LEADERSHIP ROLES:**

Debra served as the President of the California Association of Rehabilitation Counselors when the Americans with Disabilities Act (ADA) was passed and on the Board of Directors when major changes to the California Workers' Compensation were enacted by Legislature in 1994.

She was featured in Newsweek as one of San Diego's top psychotherapists, recognized by the Los Angeles Federal Executive Board for her workplace mediation expertise and mentorship, and distinguished as a leader in dispute resolution by the Southern California Mediation Association (SCMA) and the Association for Conflict Resolution (ACR). She was recognized by SkillPath Corporate Strategies in 2016 as one of the top ten trainers worldwide.

Today, she most recently served for three years on the Board of Directors for the Southern California Mediation Association (SCMA) and the last two years on the ABA Dispute Resolution Planning (ABA) Committee. She is now on the Board of Directors for Kids Managing Conflict (KMC) to advance peer mediation training in today's schools. She also serves as a Panel Member for the Employment Mediation Division of the American Arbitration Association (AAA) and professionally affiliated with DMEC, RIMS, ASSE, ACSA, PARMA, ABA, AAA, ICDR, and more.





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**THE INTERACTIVE**  
*PROCESS*