

Reflecting, Refining, and Refreshing RETAIN

December 16, 2019



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Retaining Employment and Talent
After Injury/Illness Network

 **AIR**[®]
AMERICAN INSTITUTES FOR RESEARCH[®]


ODEP
Office of Disability
Employment Policy

Today's Webinar

- Submit questions at any time during the webinar in the Chat box.
- Use for both content questions and to request technical assistance.
- Attendees will be unmuted occasionally to interact verbally.

Raise your hand or type a question in the Chat box if you have a question.



Today's Presenters



Jennifer Sheehy



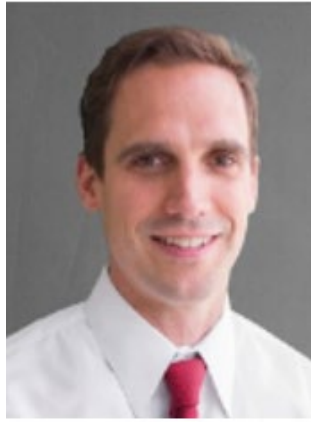
Chris McLaren, PhD



Meredith DeDona



Jackson Costa



David Wittenburg, PhD



GeMar Neloms



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Agenda

- Welcome and introduction of presenters
- Overview and update of key activities
- Q&A
- Evaluation technical assistance goals and examples
- Programmatic technical assistance goals and examples (AIR)
- Q&A

Welcome

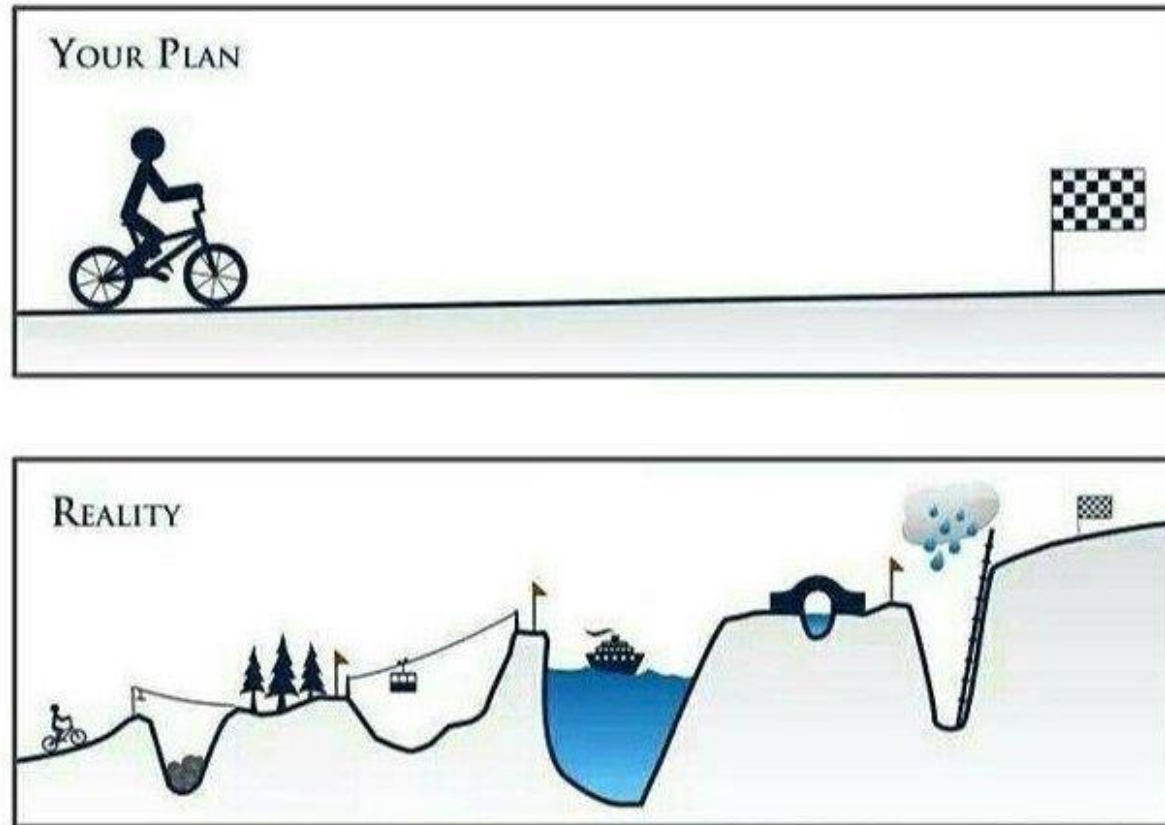
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Overview and update of key activities

Purpose of the Phase 1 grant extension

- DOL & SSA extended the Phase 1 period of performance to enable you to have more time to develop your pilot programs and continue to enroll more participants.
- You have made great progress but there is more to do!
- We want you to have the time to develop more mature pilot programs so you can identify best practices and be better prepared for a Phase 2 expansion.

Reflect on your progress, refine your approaches, and start the new year with a clear focus.



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Focus for the remainder of Phase 1

- Phase 1 goals:
 1. Test strategies to improve program enrollment numbers and rates
 2. Review and refine your program design to improve employment outcomes
- We believe that you have the greatest chance for success if you actively self-monitor your program progress and use CQI to improve processes.

Flexibility in program design

- There are certain RETAIN grant requirements, however there are program design flexibilities within those requirements:
 - Target population and referral sources
 - SAW/RTW strategy design and administration
 - Partnerships
- Data collection is required but the amount of data collected for each participant may vary depending on the services provided.
- **If you are thinking about making a program change, let your FPO, TA liaison, and Evaluation liaison know.**

Evaluation Phase 1 Goals

- Provide TA on six evaluation goals
- Learn more about your projects
- Fine tune and automate as much as possible
 - Enrollment and notification of RA assignment (if applicable)
 - Data collection and submission
- Develop programs that can lead to the development of stronger future policies

We are on your team!

- All four entities (ODEP, AIR, SSA and Mathematica) are here to help you succeed.
- Requirements: only DOL FPOs have the authority to set or change program requirements.
- Guidance: ODEP (other than FPOs), AIR, SSA, and Mathematica may provide guidance related to program implementation or evaluation.
- Roles by organization
 - ODEP FPOs: may provide both official program requirements and guidance.
 - ODEP Non-FPOs: may provide guidance.
 - AIR is the program technical assistance provider who is here to help provide guidance with your program design.
 - SSA and Mathematica is the evaluation technical assistance provider and is here to provide guidance with your program evaluation.

Extension FAQs

Q: This is now our second extension in Phase 1. Can we expect any future extensions?

A: No. There will be no further extensions to Phase 1.

Q: What about Phase 2 – will the start date be delayed again?

A: No. Phase 2 start date will not be delayed again. The initial funding must be awarded by the end of the current federal fiscal year, September 30, 2020.

Exactly how detailed do we need to be with the revised budget narrative?

...Monthly spending projections are difficult to formulate during a pilot stage during which we are testing a variety of strategies.

A: We expect that expenditures will not simply be evenly distributed across the remaining months or quarters, adding up to the total amount requested.

Rather, we expect there will be at least some variation, which should align to different strategies and levels of effort indicated in the revised work plan.

Other FAQs

Q: Is there a required format for the work plan and timeline?

A: No, DOL has not specified a work plan format. However, it must include a timeline and milestones.

Q: We have other modifications in the works. Do we need to finalize those before we can prepare this modification request?

A: No. The modifications can be combined and processed as a single modification request.

Questions?

Evaluation Technical Assistance Updates

Technical Assistance Goals: Evaluation

- Six evaluation goals (unchanged)
 - Rigorous evaluation design
 - Likelihood of sufficient recruitment
 - Ability to detect meaningful impacts
 - Data availability and quality
 - Ability to cooperate with and support the evaluation
 - Ability to learn about the program

Source: State evaluation technical assistance plans

- TA is guidance, not requirements
- States can report updates on progress at any point to Mathematica

What happens after the time extension?

- Phase 1
 - Technical assistance process
 - Monthly telephone meetings
 - Customized: States can access Mathematica at any time for support
 - Experiment with processes to inform readiness for Phase 2
- Phase 2 administrative period
 - As requested supports based on state needs
- Phase 2 post-administrative period
 - Regular ongoing supports
 - Data collection and evaluation activities

Example Evaluation TA: Data Transfers

- Starting point
 - State sends data outlined in Data Usage Agreements
 - Mathematica reviews data for missing or incomplete information
- Technical assistance
 - Mathematica provides feedback to support in getting ready for Phase 2
- Final
 - State transmission of subsequent data transfer shows readiness for Phase 2 at end of Phase 1

AIR Programmatic Technical Assistance

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Programmatic Technical Assistance Purpose

- Programmatic Technical Assistance purpose:
 - Support state planning, capacity building, and implementation through various broad-level and tailored technical assistance.
- Identified through:
 - States
 - TA event evaluations
 - Communities of practice (CoPs)
 - SME consultants
 - ODEP
 - Trends, research, and/or promising practices related to RETAIN and SAW/RTW
 - Needs assessment
- Use approaches and methods to support RETAIN's collective outcome while acknowledging differences and diversity across states.
- TA is guidance, not a requirement
 - Content is expert- and field-driven

Programmatic TA Approaches

Multimedia and On Demand

- Webinars, podcasts, and supplemental resources
- Newsletter

RETAIN TA Online Community (ROC)

- Blog posts
- Archives: tools/resources, information
- Discussion forums

CoPs

- P2P communication, idea sharing, SME guidance

1 on 1 consultations with SMEs and RETAIN TA content experts

Tools and Resources

Examples:

- OPIG
- Communications road map and Toolkit
- IT needs and gaps resource
- CQI guide
- Programmatic considerations for sample size resource

Current Information/Literature

- For Your Insight
- Research to practice briefs

Examples of Programmatic TA: Operational Planning and Implementation Guide

Using the OPIG to assess strengths and identify needs

- Facilitate review and action planning to support work plan and timeline development.
- Identify/enhance implementation approach; e.g., moving from informal to formal count of efforts.

Recruitment Processes—RETAIN Participants			
<i>Participant recruitment processes involve communicating with potentially eligible patients or workers about RETAIN, describing the project, eliciting potential interest in the project, asking if the individual will participate, conducting informed consent, documenting recruitment efforts and results, and completing other recruitment steps.</i>			
• Have you developed a written procedure that describes the steps in recruiting RETAIN participants?			
• Have you developed plans and processes for documenting recruitment actions and results at the worker level?			
• Have you developed or adapted existing information systems to support documentation of recruitment actions and results?			
• Do you plan to develop a specific communication plan or script to guide the information sharing process for informing potential participants about the RETAIN project?			
– If yes, have you developed this plan and/or script?			
• Have you developed plans and processes for conducting informed consent with potential participants?			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			

Examples of Programmatic TA

- Facilitate understanding and application of refusal conversion techniques to enhance participant enrollment.
- Communications:
 - Review and provide guidance on branding, templates, and marketing materials.
 - Develop stakeholder scripts for adaptation by states and for use with employers, participants, and health care providers to support recruitment.
- Continuous quality improvement resources.

Questions?

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*Thank you
for your
hard work and dedication
to RETAIN!*

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