

# State to State Learning Exchange Series Part 1: Ohio, Kansas and Vermont



Moderator:  
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Director, RETAIN TA  
Principal Technical Assistance Consultant , AIR



September 8, 2021

**RETAIN**

Retaining Employment and Talent  
After Injury/Illness Network

 **AIR**<sup>®</sup>  
Advancing Evidence.  
Improving Lives.

  
**ODEP**  
Office of Disability  
Employment Policy

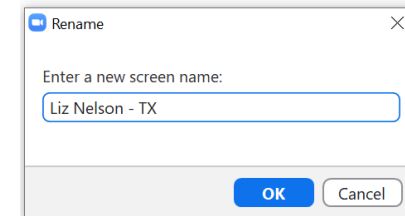
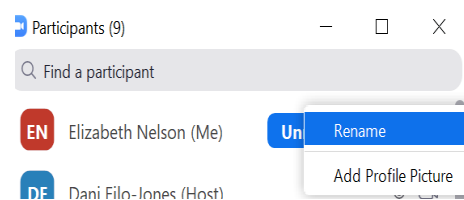
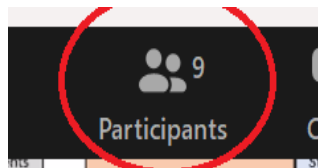
# How to Participate

Chat box and email:

- Use the chat box throughout the session to make comments and communicate your tech problems. Raise your hand and we'll call on you. Lower your hand after you've been called on.
- You also can communicate by email at [RETAINTA@air.org](mailto:RETAINTA@air.org).

Other helpful Zoom features:

- To access closed captioning, click on the link in the chat box.
- To add your state abbreviation to your name, find your name under "Participants," click "More" beside your name, and select "Rename."



# Disclaimer

This event is conducted by the American Institutes for Research for the U.S. Department of Labor (DOL) Office of Disability Employment Policy and Retaining Employment and Talent After Injury/Illness Network (RETAIN) state grantees, under DOL Contract Number 1605DC-18-F-00429. The views expressed are those of the authors and should not be attributed to DOL, nor does mention of trade names, commercial products, or organizations imply endorsement of same by the U.S. Government.

# About RETAIN

- Retaining Employment and Talent After Injury/Illness Network (RETAIN)
- Joint initiative led by the U.S. Department of Labor (DOL) and the Office of Disability Employment Policy (ODEP), and funded by ODEP, DOL's Employment and Training Administration and the Social Security Administration
- RETAIN technical assistance (TA) funded by ODEP and housed at the American Institutes for Research (AIR)
- Focused on building state capacity in stay-at-work (SAW)/return-to-work (RTW) strategies across eight states
- Explores ways to help people who become ill or injured during their working years remain in the labor force

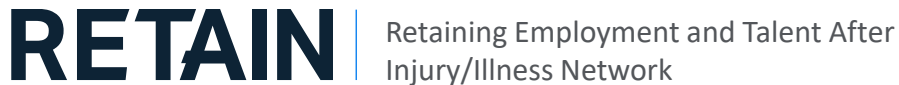
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# Welcome

**RETAIN** | Retaining Employment and Talent After  
Injury/Illness Network

# State to State Exchange: Overview and Objectives



## State to State Exchange:

- Learn about the RETAIN model and goals of peer RETAIN state grantees
- Identify and explore areas of interest across state approaches to SAW/RTW
- Create ongoing opportunities for peer-to-peer thought partnership and resource sharing
- Identify potential topic areas of interest for future peer-to-peer exchanges and supporting resources

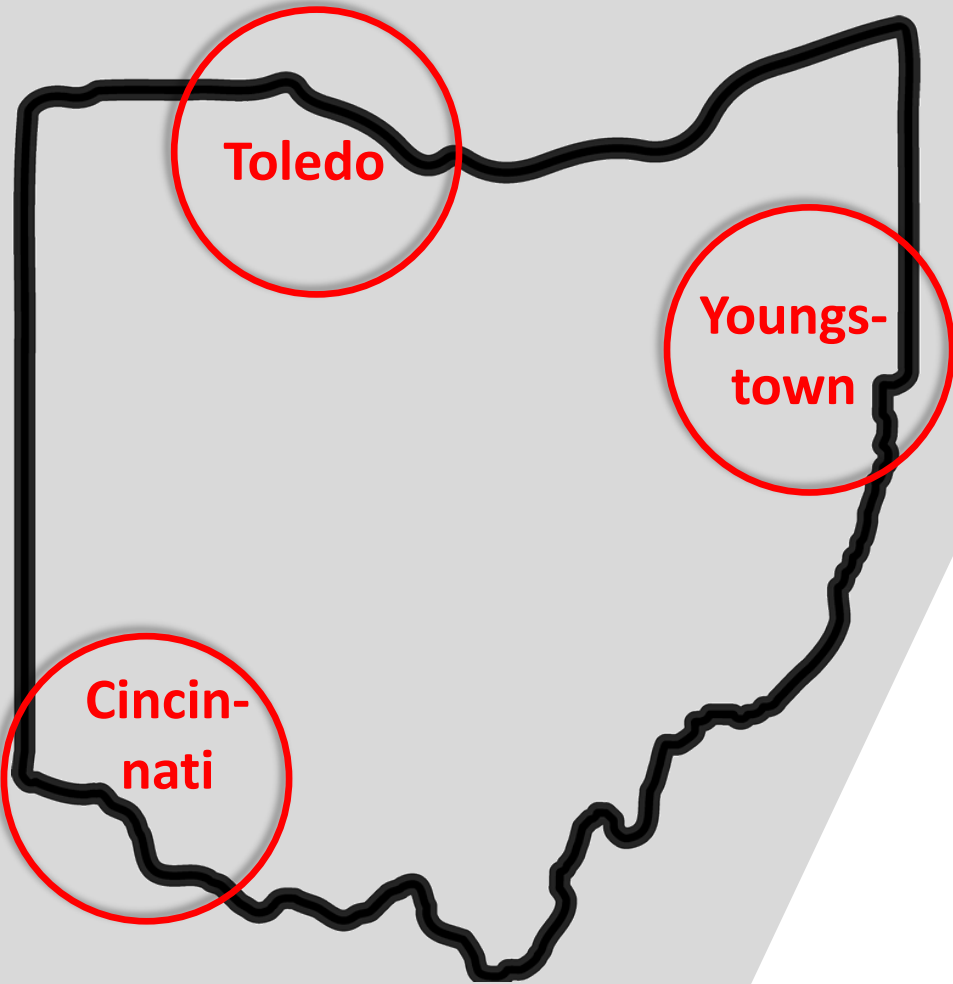
# RETAIN



Retaining  
Employment  
and Talent After  
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Network

A Collaboration Between Mercy Health and Ohio Department of Job and Family Services





## Ohio RETAIN

- **Non-occupational illnesses/injuries**
  - Musculoskeletal
  - Cardiovascular
- **Bon Secours Mercy Health**
  - Health Service Coordinators
  - Patients
  - Providers
- **OhioMeansJobs (OMJ) centers**
  - Workforce services
  - Rehabilitative services
  - Employer outreach and T.A.

**RETAIN**  
OHIO  
**Phase 1**  
**Outcomes**

210 participants  
(191 in  
Treatment)

123 medical  
providers  
trained

Participant  
flows & referral  
protocols

Automated data  
transfers &  
validation

Added Social  
Workers to  
RETAIN team

Expended 99.2%  
of Phase 1  
funding

# Phase 1 Lessons Learned

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- Many patients were reluctant to join study
- Patients need social services beyond E&T alone
- IT solutions were more expensive than expected
- Our partnerships are our greatest success factor

# Phase Two

## Projection Chart

- **Goal 1:**
  - **3,500** participant enrollments
- **Goal 2:**
  - **334** new provider enrollments
- **Goal 3:**
  - **500** employer enrollments

Youngstown	Toledo	Cincinnati
1,100	1,100	1,300
35	123	176
150	150	200

# Value For **RETAIN Patients**

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- \$100 gift card (all enrollees)
- Patient handbook explaining RETAIN
- Care coordination (Treatment group)
  - Personalized plan
  - Help with financial hardship and employment needs
  - Emotional support with ongoing hardships/ lifestyle changes
  - Employer technical assistance and support for accommodations
  - Help with building a stronger patient/physician relationship



**One or two areas that your team is excited about and could have a big impact on workers in your state:**

**“RETAIN-Friendly” employer list**

**Sustainable Model**

**What guidance, thought partnership, or area of support would you like from other RETAIN states?**

**Other benefits to employers**

# Questions?

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Feel free to contact us for more information:

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ODJFS RETAIN Project Manager

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## **Kori Smith**

Mercy Health RETAIN Program Manager

(330) 360-7998

[KAsmith4@mercy.com](mailto:KAsmith4@mercy.com)

# RETAIN WORKS

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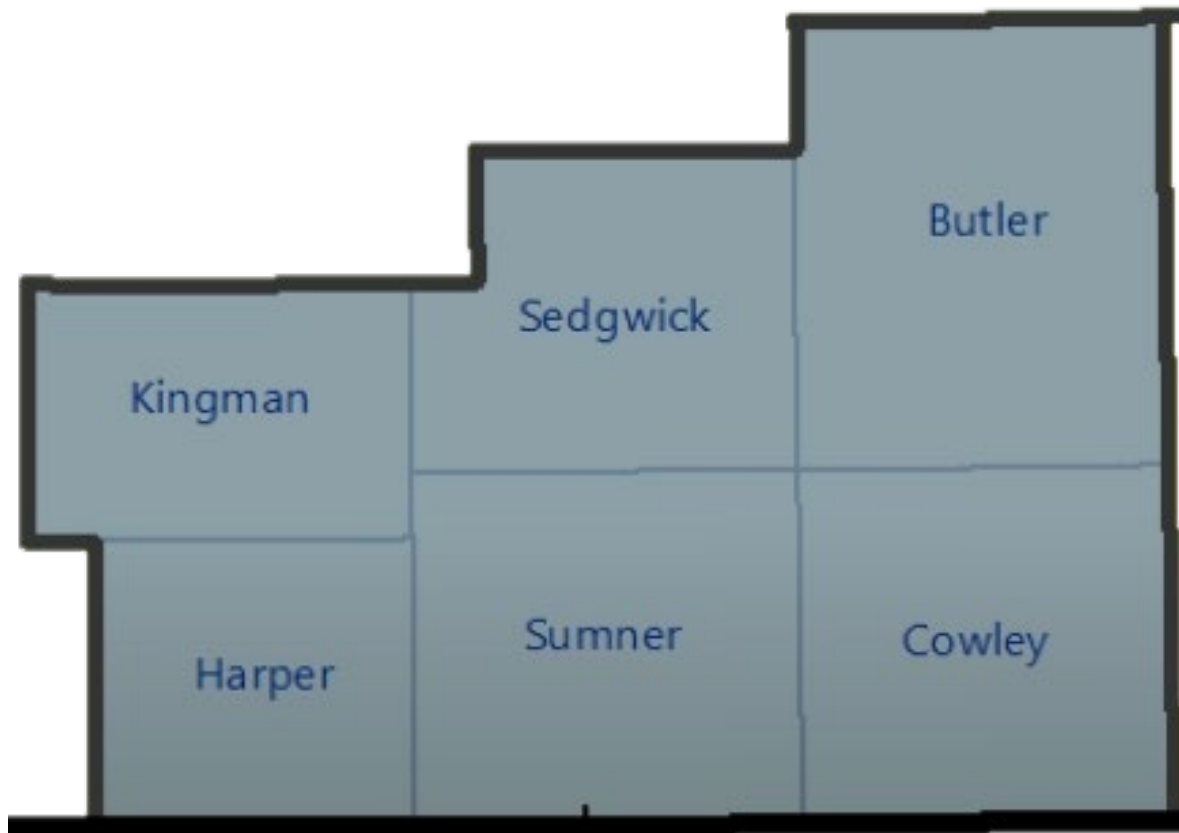


## Dale Tower

State Disability Employment  
Resource Coordinator

Kansas Department of Commerce

# Phase One Service Area & Partners



**Ascension  
Via Christi**

# Enrollment Criteria

**The work disability must impact the participant's employment in one or more of the following ways:**

- Ability to attend work
- Ability to perform work duties
- Work performance/productivity

**The condition should be new or an exacerbation of a chronic condition for example:** musculoskeletal, mental health, chronic diseases such as diabetes and COPD, or newly diagnosed illnesses or injuries that affect the individual's employment, such as COVID 19 long haulers.

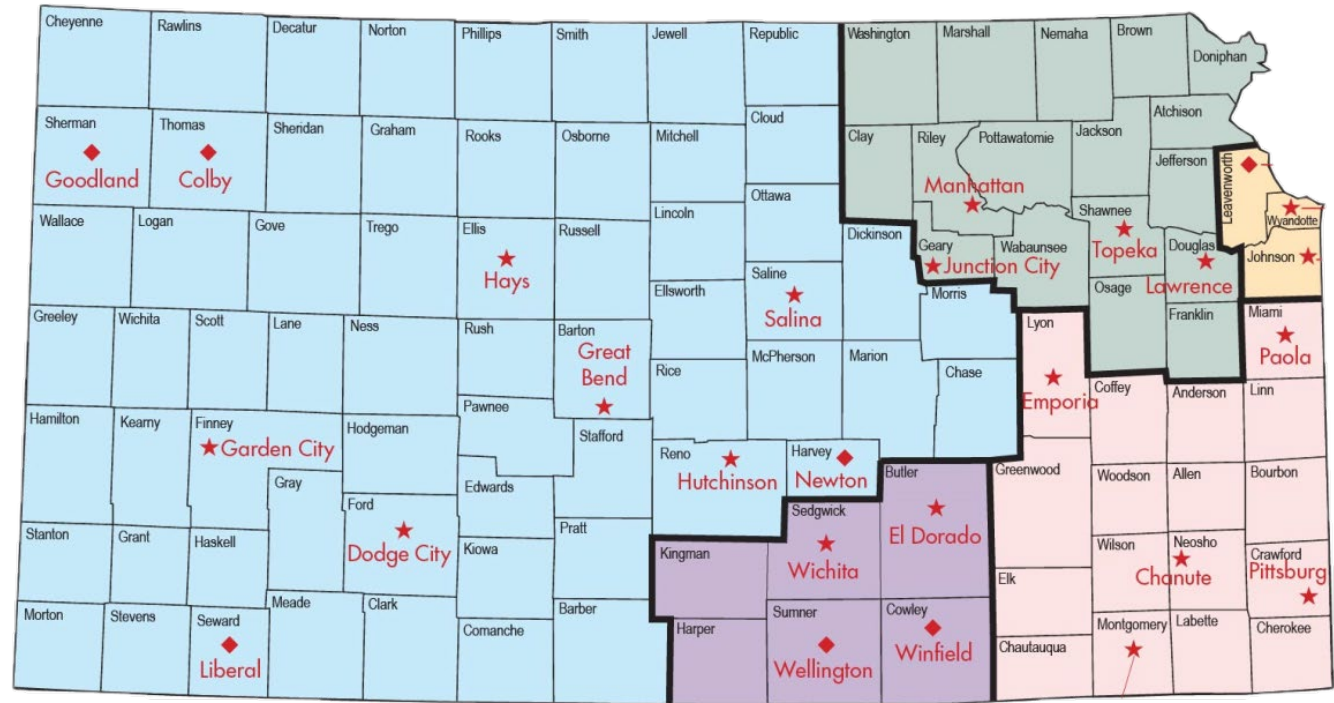
# Phase Two Expansion



**Kansas Business  
Group on Health**



**Mid-America  
Coalition on  
Health Care**





## Amanda Duncan

Vice President and Chief Business  
Development Officer

Workforce Alliance of South Central  
Kansas

# Majority of RETAINWORKS participants were able to return to work as soon as medically possible!

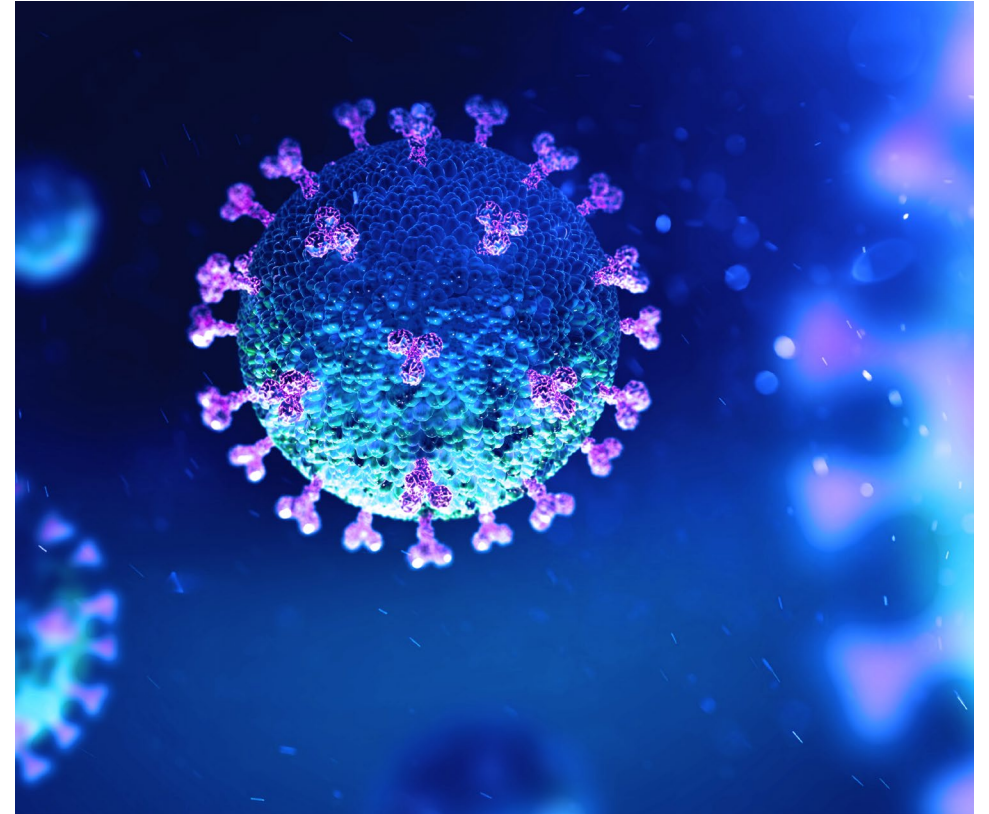
- 95% of participants had job duties altered/changed
- 5% of participants required a physical accommodation
- 50% of RETAINWORKS participants received supportive services to assist with barrier remediation while in the program
- Of the RETAINWORKS participants who changed employers, **NONE** have reported taking a lower wage
- Most have reported increases in wages
- Largest increase reported was \$12.00 to \$19.00 per hour after participation



<https://www.kwch.com/2020/10/28/building-you-program-helps-ill-injured-residents-in-butler-county/>

# Lessons Learned

- ✓ Importance of serving those with off the job injury and illness
- ✓ Experience of scaling the project in Phase 1
- ✓ Value of working with small and large medical systems
- ✓ Virtual Service Delivery vs. Engagement



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**Travis Francis**

Director - Occupational Health

Ascension Via Christi



# Collaboration Across Medical Systems & Providers



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# What's Exciting in Kansas



- Employer engagement
- Support of the Governor
- Involvement of the State of Kansas as a lead employer – reaching over 20,000 employees

# Guidance from other RETAIN States

- Provider education strategies
- Ways to improve engagement and develop rapport with providers, patients, and employers virtually.
- Overcoming access to medical information across systems for the Nurse Navigator

**Questions?**

# State-to-State Exchange: VT RETAIN

September 8, 2021

Our vision is to create a sustainable work disability prevention program that bridges health and employment services and is accessible to every Vermont clinician, employer, and worker in need of support



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Employment  
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# Disclaimer

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# Outline

1. VT RETAIN program overview
2. Highlights from Phase 1
3. Activity Spotlight
4. State-to-state collaboration
5. Questions

# Program Overview

Brief description of the VT RETAIN program; see summary document for more details





Our vision is to create a sustainable work disability prevention program that bridges health and employment services and is accessible to every Vermont clinician, employer, and worker in need of support

# Introductions – the VT RETAIN Team

Name	Role on VT RETAIN
J. Stephen Monahan	P.I., Operations Center, Vermont Department of Labor
Andy Haig	P.I., Development Center, Haig Consulting
Karen Huyck	P.I., Clinical Coordinating Center, Dartmouth-Hitchcock
Christine McDonough	P.I., Data Coordinating Center, University of Pittsburgh
Chrissy Geiler	Grant Manager, Vermont Department of Labor
Carrie Freitag	Project Manager
Deborah Kennedy	Senior Strategist for Value-Based Services
David Dent	Director, Community Functional Restoration Program
Jon Lurie	Referral and Enrollment Lead
Mary Guyette, Evelyn Stoecklein	Work-Health Coaches
Sarah Buxton	Interim Workforce Development Lead
Margaret Kerouac	Research Assistant, Interim TA Liaison
VT RETAIN partners	Advisory Board members

# VT RETAIN organization

1. Multi-PI project across four centers (operations, clinical, data, and development)
2. Key activities are accomplished through working groups
3. Partners comprise the advisory board
4. Advisory board meeting occur monthly and include:
  - a. Monthly Executive Summary
  - b. Working group updates
  - c. VT RETAIN Activity Highlight
  - d. Partner Spotlight
  - e. Upcoming Meetings and Events
  - f. Discussion, polls, and surveys

# Vermont Disability Statistics

- Vermont has one of the highest SSDI prevalence rates in the U.S.
- Vermont' has **2<sup>nd</sup> highest rate** in the U.S. of young people receiving SSDI
- If Vermont's SSDI prevalence rate was equal to the national average, our labor force would increase by **5,000** workers

FIG 7. People with Disabilities Ages 18-64 Years Living in the Community, by State, 2016

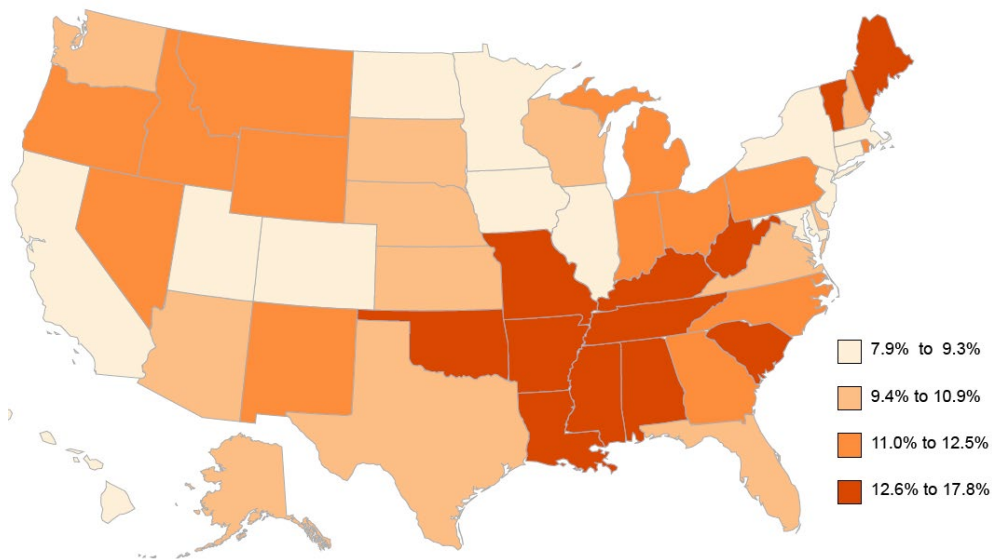


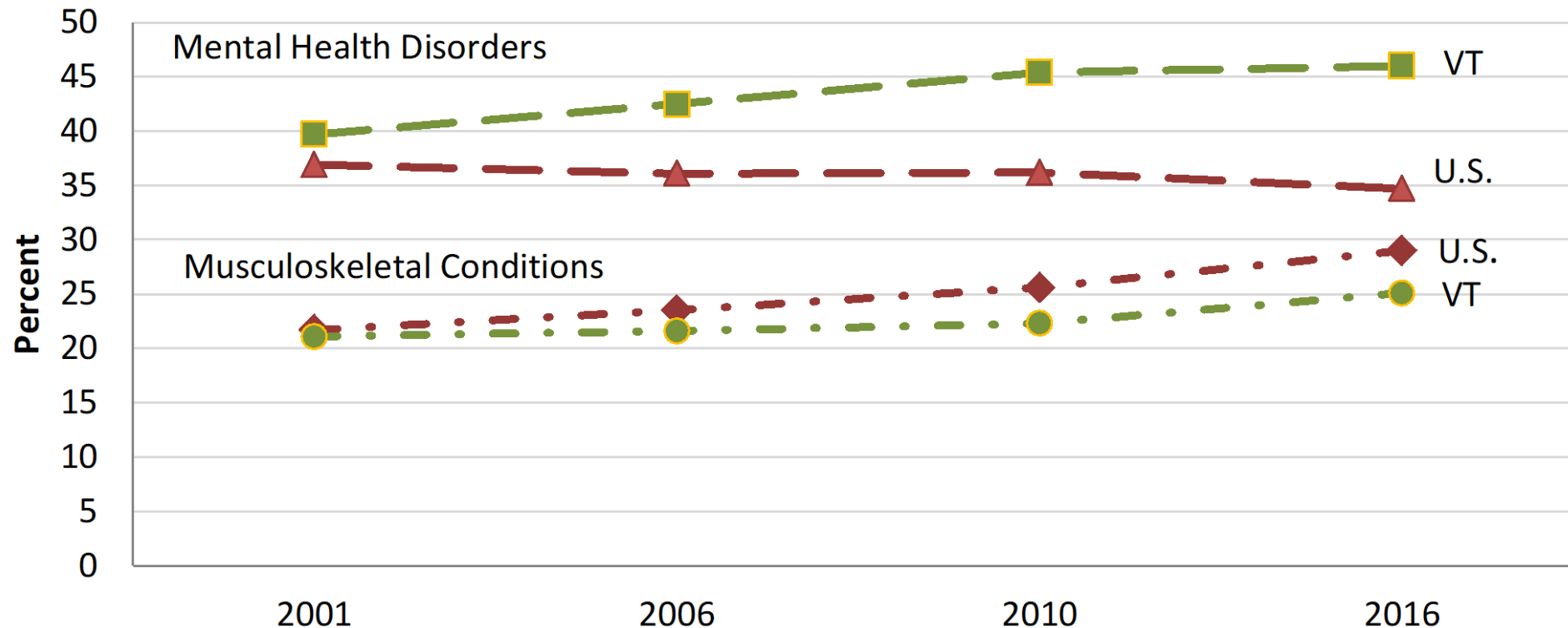
FIG 8. People with Disabilities Ages 65 and Over Living in the Community, by State, 2016

Percentage of Age Group Receiving SSDI Benefits					
	<u>All</u>	<u>Under 35</u>	<u>35-44</u>	<u>45-54</u>	<u>55-65</u>
Vermont	6.15%	2.12%	4.12%	6.79%	10.72%
U.S.	4.80%	0.90%	2.50%	5.49%	11.28%

Source: Vermont Joint Fiscal Office

# Vermont Disability Statistics

Figure 2. Shares of SSDI Beneficiaries who became eligible on the basis of mental health disorders or musculoskeletal conditions; Vermont and the U.S.; 2001, 2006, 2010 and 2016



Source: SSA, *Annual Statistical Report on the Social Security Disability Insurance Program*, various years, Table 11.

# Patient Screening

Primary care practices  
screen patients for  
risk of work disability



Cluster randomized design (at level of PCP practice). Target is 68 enrolled practices and 1020 participants per arm (or 30 patients per practice over 2.5 years or 1 participant per practice per month).

**Working is an important part of staying healthy.**

Our practice has partnered with Vermont RETAIN, a free program through the State of Vermont. Vermont RETAIN provides support and resources to people having trouble staying at or returning to work after an injury or illness. We are asking our patients to answer two questions to see if you are eligible for a research study that Vermont RETAIN is running to understand the best type of support to provide.

CALL 802-526-9777 IF YOU NEED HELP FILLING OUT THIS SURVEY

**Are you 18 years or older?**

- Yes  
 No

**Do you have an injury or illness that is limiting (or could limit) your ability to stay at or return to work?**

- Yes  
 No

[reset](#)

**First Name:**

**Last Name:**

**Phone Number (landline):**

**Phone Number (mobile):**

**Email address:**

**How does the Vermont RETAIN study work?**

You will receive support to help you get better and back to work. We also will ask you to fill out surveys. You will receive financial compensation for completing the surveys. The goal of this study is to understand what resources best help people with an injury or illness stay at or return to work.

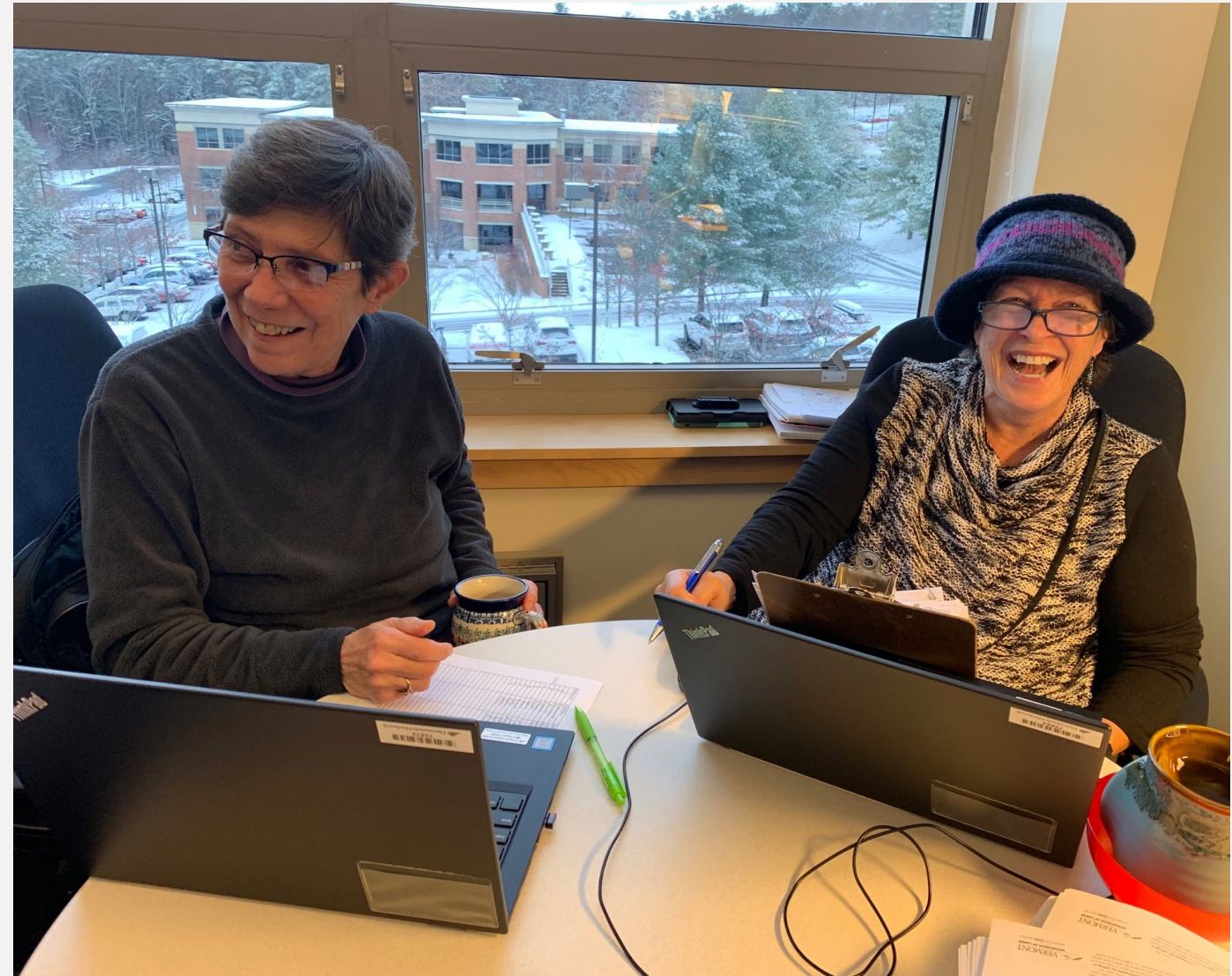
You can opt out at any time if you do not wish to participate by calling or emailing VT RETAIN.

# Highlights from Phase 1



# Phase 1 Outcomes

- ✓ Conducted 19 focus groups and over 30 interviews
- ✓ Collaborated with 6 pilot practices
- ✓ Enrolled 103 worker participants
- ✓ High satisfaction rates from providers and patients
- ✓ High stay at or return to work rates for patients
- ✓ Conducted training sessions for 37 employers
- ✓ Conducted training sessions for 100 providers
- ✓ 29% of providers confident identifying risk of work disability → 89% were confident post-training
- ✓ 32% of providers confident in writing RTW letter → 78% confident post-training
- ✓ Piloted 3 new SAW/RTW programs to fill gaps identified by needs assessment
- ✓ Developed and piloted a mobile health care coordination system to support SAW/RTW



VT RETAIN Return-to-Work Care Coordinators



# Vermont RETAIN Project Diagram

Best practices, sustainability, equity, and continuous quality improvement are part of all our programs

## Training and Development Program for providers, employers, workers, RTW professionals, and other stakeholders

- Free and accessible learning platform to fill gaps in knowledge
- Training grants to fill gaps in services

## Early Return-to-Work Program for workers based in care coordination:

- early communication
- strength-based coaching
- resources and education
- connection to health and employment services

Enhanced RTW services

### Worker SAW/RTW Services for all types of work-limiting health conditions

Connection to services

Musculoskeletal

Mental health

Substance Use

Other conditions

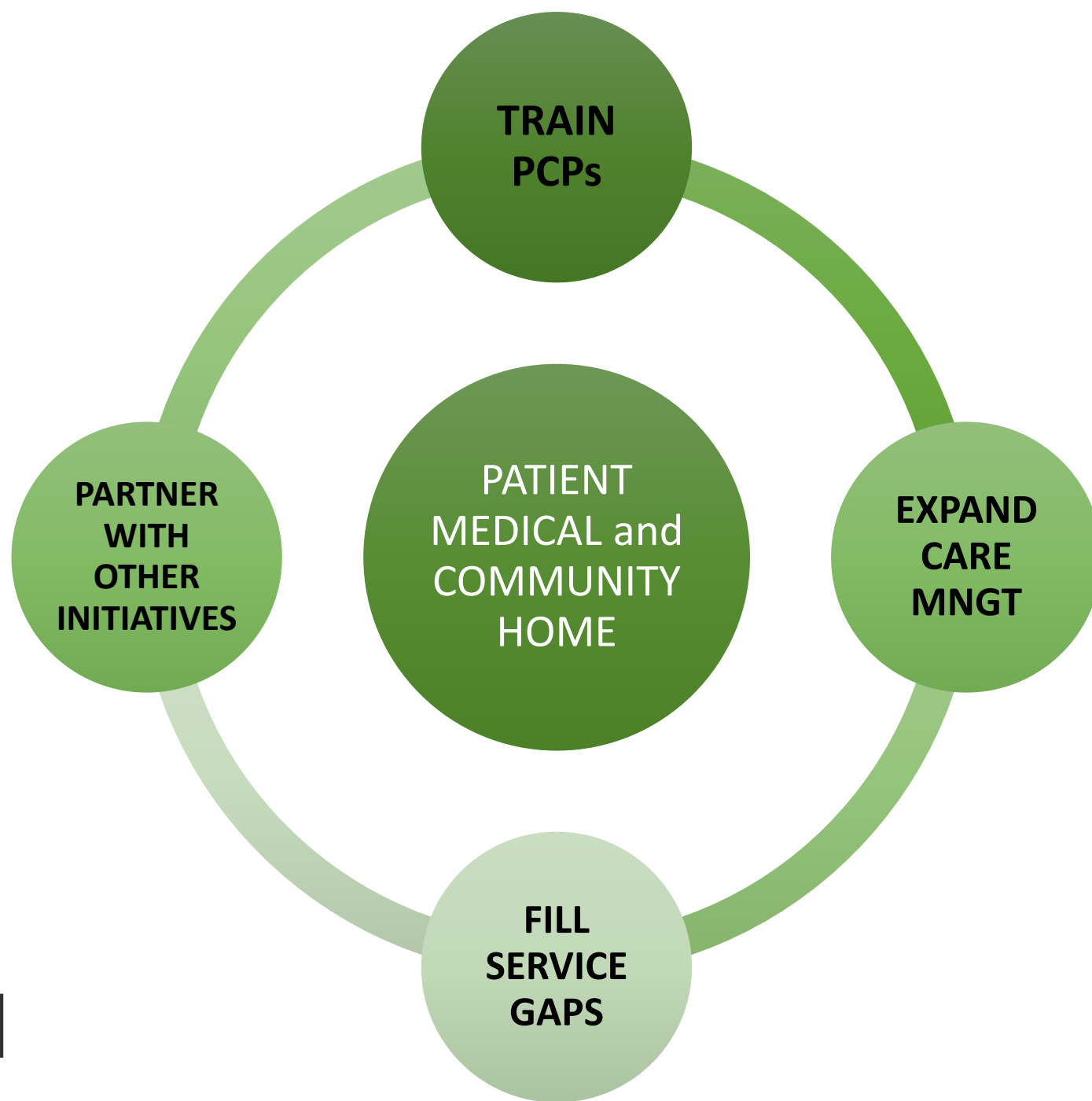
using **Return-to-Work Services Inventory**  
(to match services to RTW plan)

e.g., employment services, vocational rehabilitation, EAP and workplace interventions,  
medical rehabilitation services, community SAW/RTW programs



# VT RETAIN Activity Spotlight





# State-to-State Collaboration



# RETAIN nationally and locally: ...If we all succeed...

- How will our work be sustained after Year 4?
- How will we share our successes with other states?
- An organization that takes responsibility across all platforms
- Purposeful designs so others don't have to work so hard to copy us
- Integration of good ideas across all RETAIN states
- Political and financial arguments for organizations to build their components

# Potential outcomes by stakeholder

Stakeholder	Interest	Outcome (compared to control group)
<b>Federal Government</b>	Social Security Disability, Medicare	Fewer people on SSD or Medicare
<b>State Government</b>	Medicaid, tax base	Fewer on Medicaid. More income tax revenue (underemployment as well as unemployed)
<b>Employers</b>	Productivity, efficiency	Less absenteeism/presenteeism, Smaller comp and commercial insurance premiums, less employee turnover, less work for human resource staff, employee morale
<b>Commercial Insurers</b>	Medical expenses, overhead	Fewer medical costs. Smaller administrative costs (disputed coverage with work comp, preapproval costs, etc.) Market advantage over other insurers.
<b>Workers Compensation Insurers</b>	Wage replacement, Medical expenses, permanency payments, overhead	Prevention of work claims (halo effect), time off work, permanency settlements (though transfer to Medicaid saves money), less money spent on adjusters and private case managers
<b>Current Health Systems</b>	Quality, market share, profit	Justification for more profitable procedures and hospitalization, increased clinician efficiency, added payment for extra services, sustainability of large overhead 'anchors' such as hospital buildings. Improved population health
<b>Green Mountain Care Board</b>	Cost savings and quality	Decreased total healthcare costs. Demonstration of specific areas to pressure health systems

# Discussion and Questions

We Want to Hear Your Thoughts and Questions



# Open Discussion



# Next Steps

## Participation Survey and Upcoming Events

- Your Feedback on the Participation Survey for Today's Event Matters!

[https://www.surveymonkey.com/r/StateExch\\_Part1](https://www.surveymonkey.com/r/StateExch_Part1)

Participant feedback creates opportunities for States to follow up on areas of interest expressed by others.

- Upcoming Events

**State to State Exchange Part 2: Kentucky and Minnesota**  
Wednesday September 29, 2021  
2:00pm – 3:00pm ET

- Save the Date!

**RETAIN Annual Convening**  
Tuesday November 2 – Thursday November 4, 2021  
12:00pm – 4:30pm ET

# Thank you for your participation!

Please take a moment to complete this evaluation:

[https://www.surveymonkey.com/r/StateExch\\_Part1](https://www.surveymonkey.com/r/StateExch_Part1)