

RETAIN Business Engagement Bootcamp *Part 1*

May 25, 2023



RETAIN

Retaining Employment and Talent
After Injury/Illness Network



Virtual Meeting/Conference Recording Notice

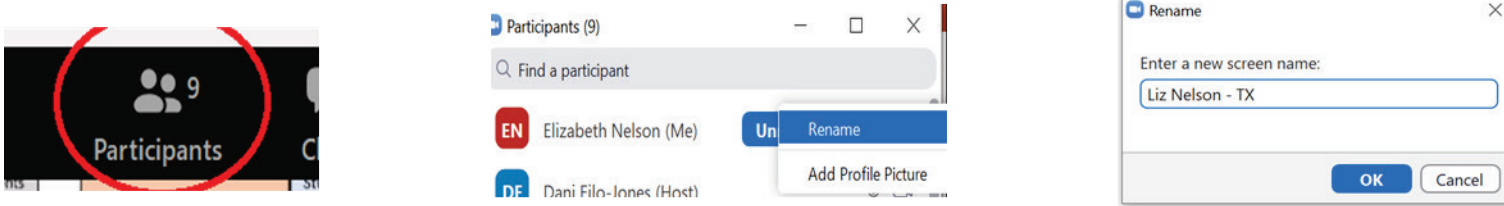
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Disclaimer

This event is conducted by the American Institutes for Research (AIR) for the U.S. Department of Labor (DOL) Office of Disability Employment Policy (ODEP) and the 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.

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- Help with tech problems:
 - Use the chat box throughout the session to communicate your tech problems. If needed, raise your hand and we'll call on you.
 - You also can communicate by email at RETAINTA@air.org.
- Renaming yourself in Zoom
 - **To add your state abbreviation to your name**, find your name under “Participants,” click “More” beside your name, and select “Rename.”



- Other helpful Zoom features:
 - To access closed captioning, click on the CC feature at the bottom of the Zoom window.

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ENGAGE EVERYONE



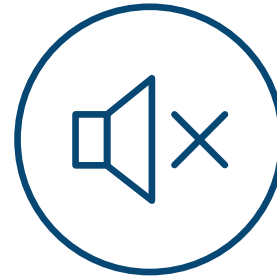
BE HEARD AND SEEN



ACKNOWLEDGE SPEAKER



MAXIMIZE MICROPHONES



MINIMIZE NOISE



MAXIMIZE VISUAL DISPLAYS

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*If you have technical difficulties, please email us at
RETAINTA@air.org and a team member will assist you.*

RETAIN Business Engagement Bootcamp Series

- Part 1: Introduction to the SOAR framework (*Today*)
- Part 2: Three sessions per state team with RETAIN subject matter experts (*June – August 2023*)
 - Session 1: Conduct appreciative inquiry with RETAIN SME
 - Session 2: SMEs will present themed response to appreciative inquiry results and ask deeper dive questions to confirm understanding.
 - Session 3: SMEs will present a draft business engagement plan for the state and return it to them to finalize
- Part 3: Sharing your Business Engagement Plans (*Sept 20th - Day 2 of the RETAIN Annual Convening*)

Today's Agenda

- Welcome and Introductions (10 minutes)
- What is business engagement? (15 minutes)
- Introduction to the SOAR framework (15 minutes)
- Questions and Answers (15 minutes)
- Wrap-up and Next steps (5 minutes)

Introducing the RETAIN Business Engagement Subject Matter Experts



**Tonia Peterson, MA, CRC, LPC,
OTR/L**

Program Manager with the
Business Network Division of
Michigan Rehabilitation Services
(MRS)



Leslie Dawson, MA, CRC, NCC

ADA Specialist, Sedgwick; Former
State Administrator, Business
Relations Program, Alabama
Department of Rehabilitation
Services



**Derek Shields, MMDS,
PMP**

President, ForwardWorks
Consulting, Inc.



Joe Ashley, RhD

Principal, Ashley Consulting, LLC;
Former Assistant Commissioner,
Virginia Department for Aging and
Rehabilitative Services (DARS)

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Business Engagement: What is it?

Leslie Dawson and Tonia Peterson

Poll

- How would you rate the effectiveness of your business engagement today?

Scale:

1- Not Very Effective

2- A Work in Progress

3- Somewhat effective

4- Effective, getting results

5- Very Effective



Business Engagement... is a robust relationship with business and industry that leads to positive outcomes for both the business and RETAIN participants.

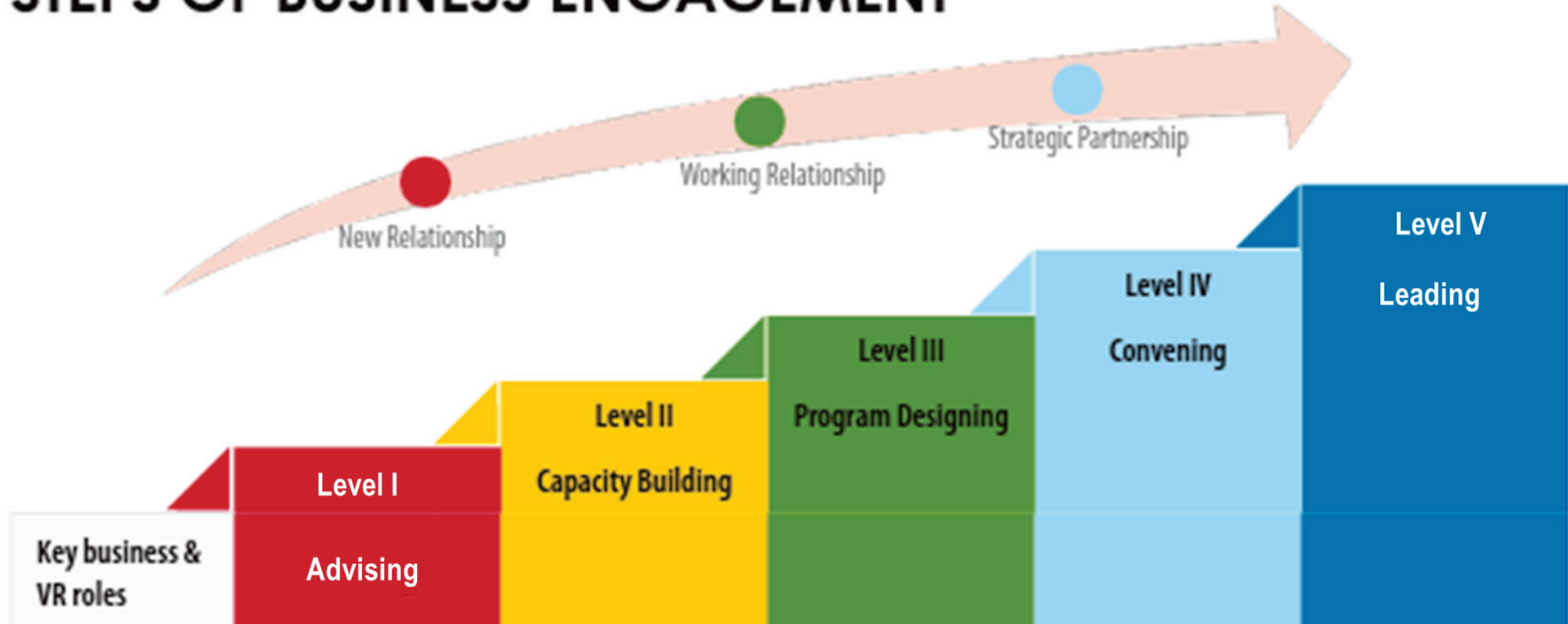
The Role of Business Engagement in your RETAIN program

- Fosters long-term relationships
- Creates value for all partners
- Changes the conversation from big picture to specific needs
- Promotes buy-in from the beginning

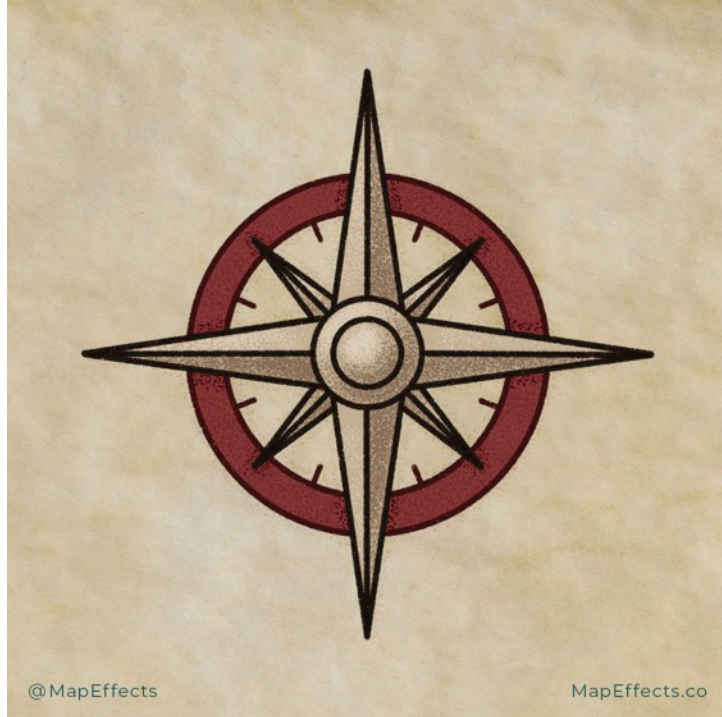


Steps of Business Engagement

STEPS OF BUSINESS ENGAGEMENT




The Business Engagement Plan



Purpose

- Mission
- Goals
- Objectives
- Strategies
- Assessing
- Re-defining



“The questions that you ask, the ideas you bring to the table, and your communication skills, combined with your passion, belief and attitude, are the fundamentals of what it takes to connect.”

Words of wisdom from Jeffrey Gitomer
Little Black Book of Connections

Choosing to SOAR

Joe Ashley and Derek Shields

SOAR Framework

Strategic Inquiry

- Strengths: What are we great at?
- Opportunities: What are the possibilities?

Appreciative Inquiry

Appreciative is adding valuing and being grateful. Inquiry is about curiosity, wondering and searching.)

- Aspirations: What do we want to achieve?
- Results: What will we measure?

SOAR Characteristics

- Identify and build on strengths.
- Utilize broad stakeholder input for additional perspective.
- Connect to and clarify the organization's value set, vision, and mission.
- Discover opportunities such as new customers, partners or innovations that the organization aspires to pursue.
- Determine and align organizational goals and objectives.
- Review or create new strategies, processes, structures, and systems to support the vision, mission and goals.
- Implement the strategy or strategic plan so it guides every day decision making and action.

Planning Model, Pt 1

Initiate: Choosing to Use Appreciative Inquiry

- Establish core planning team
- Identify type and number of stakeholders
- Determine when and how engagement will occur
- Craft the questions

Inquire: Asking SOAR Questions

- Questionnaires
- Summary of findings

Imagine: Creating a shared vision

- Small group possibility thinking
- Large group review of findings



Planning Model, Pt 2

Innovate: Designing the strategic initiatives

- Transform ideas from Inquire and Imagine into strategic initiatives and actionable plans
- Get creative, then get real (process, organization structure, systems, culture & behaviors)

Implement: Moving to inspired action

- Strategic roadmap and tactical plans (project management plans, objectives and scorecards)
- Performance Management Dashboard and Continuous Process Improvement

Question Sets 1 & 2

• Strengths

- What are we most proud of at RETAIN? How does that reflect our greatest strength?
- What are our organizational and personal RETAIN high point experiences, when you felt most engaged & proud of your involvement?
- How do we leverage our strengths to get results? How do these strengths fit with today's realities? Where are the gaps that our strengths will help close and solve?
- What has been successful in reaching out to partners?

• Opportunities

- In terms of business engagement, how do we make sense of opportunities? Who are possible new business engagement customers and partners?
- How might we best meet the needs of our stakeholders?

Question Sets 3 & 4

- **Aspirations**

- What do you deeply care about? What should RETAIN become the best at in the world?
- Who should we become and where should we go in the future?
- What is our most compelling aspiration?
- When thinking about business engagement, what strategic initiatives would support our aspirations?

- **Results**

- When considering business engagement, what meaningful measures would indicate we are on track? How do we know that we are successful?
- How will we know when we succeed? And when we do succeed, how should we celebrate?
- What else would you like to share to inform the next phase in RETAIN's work, both internally or externally?

Why SOAR?

- Focus on strengths and opportunities
- Utilize a practical approach to whole system engagement
- Engage stakeholders at various levels to contribute their ideas, reducing implementation timeframes
- Design the framework and produce your RETAIN Business Engagement Plan
- Realize new levels of business engagement around stay at work and return to work

Q & A

All

Wrap-up and Next Steps

- Each state will be paired with an SME who will work with your team individually to complete Part 2.
- Your RETAIN TA Coach will work with your team to schedule Sessions 1-3 of Part 2.
- Please let your state's RETAIN TA Coach know who will be participating from your state in Part 2.
- If states choose not to complete Part 2 of the series, they are still responsible for creating a Business Engagement Plan as specified in the TA Plan.

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Before you go

Please complete our post-event assessment linked in the chat:

<https://www.surveymonkey.com/r/PZTM29F>

Reach out to RETAINTA@air.org with any questions you have!

Recording and slides from this event will be available on the ROC shortly.