

## RETAIN Sustainability Workshop: Strategic Vision—Notes

**Facilitator: Darcee Simon**

**August 21, 2024**

Darcee greeted participants, facilitated introductions, and went over the meeting guidelines. She shared that this virtual meeting is an Informal space for RETAIN states to come together and share thoughts around sustainability.

Afterward, Darcee gave a tour of two new Sustainability resources. These resources include a brief and related toolkit that explores sustainability in five key areas: strategic vision, funding stability, organizational capacity, partner engagement, and strategic communication.

Darcee then talked about strategic vision in relation to sustainability, especially in terms of thinking through what part of the program potentially needs to be modified and what success looks like in this next phase of RETAIN. Darcee then asked the first discussion question.

**Question: How do you think your state is doing in developing a strategic vision for sustainability?**

- Minnesota stated that it is trying to make changes in how it finds participants and reaches out to providers. Once Minnesota gets comfortable with these changes, it will begin to plan what it can do in the long term. In Phase 2, Minnesota did a lot of cold calling and is now transitioning to a more referral-based system from partners.
- Vermont said that it is in between developing its strategic vision and being prepared for sustainability. Vermont has many excellent partners who are part of the sustainability process. Vermont feels that it is in sync with many of the concepts found in the sustainability brief and tools.
- Ohio is working through organizational logistics but moving forward.

**Question: How is developing strategic planning for sustainability different from strategic planning for initial implementation? Which is more challenging?**

- Kentucky said that looking forward to strategic vision seems easier than developing it from Phase 1 and 2. Kentucky just needs to find that link to what it is doing now and how to keep it going in the future. Kentucky knows what it wants to do; however, it is waiting on key high-level decisions. Funding is a big thing for Kentucky, as it wants to continue all its services just as in Phase 2. If the funding changes, it will have to adjust and narrow things based on how that looks.

**Question: Anything you want to share; a challenge or experience with strategic vision?**

- Kansas stated that it has built its vision and has worked toward realizing it. It has been challenging to provide a resource statewide, and Kansas has done a good job in achieving that goal. Kansas's vision has not changed much from the beginning. A large part of Kansas is rural,

and it has incorporated multiple medical and workforce systems that have remained the same. The major challenge for Kansas is funding. Kansas has four major medical systems and five workforce systems, and it is trying to make those systems work and serve the entire state. Kansas is looking into new partnerships by region; it is looking at different regions throughout the state to find out what resources are available in that community that may support RETAIN. Kansas is also looking for partners statewide at organizations that have a broader influence beyond workforce and medical partners. Kansas is also looking at employers.

**Question: Are other states thinking about taking a geographical approach to your program? Are any of you focusing on new areas?**

- Vermont is considering geography as a strategy, especially for fostering sustainability. Vermont is working on a regional panel of providers and what is needed in terms of support.
- Ohio said that the sky is the limit, and it has been looking into expanding into neighboring states.
- Minnesota said that it has already expanded throughout the state in Phase 2.

**Question: What types of conversations are you having? Have there been shifts in the level of partner involvement or changing partners? What do partner conversations around strategic vision look like for sustainability?**

- Ohio said that looking at the organizational footprint has been helpful, since our provider has facilities outside of Ohio. A lot of people have been reactive and understand the need for the work we are doing.
- Minnesota said that it has not secured any strategic relationships yet. Minnesota is removing the randomization component from its intervention, which should make providers/partners more willing to hear about its RETAIN program.
- Kentucky added that it stopped randomization, and it has now been easier to recruit and expand. Kentucky also changed its eligibility criteria. Eligible participants now include individuals receiving SSI/SSDI, which has boosted referrals. Kentucky's partners are counting on it being around for a long time, and it has committed to making that happen.
  - Minnesota asked Kentucky if adding SSI/SSDI to the eligibility criteria has significantly boosted enrollment.
  - Kentucky replied that it has, but it does not have specific numbers on hand.
  - Ohio said that it has not changed its eligibility criteria. Ohio took a look at how it was identifying patients and found ways to better filter for eligible patients.
- Vermont said that it serves the whole state, and its partners expect it to be a resource for a long time.

Darcee asked if the states had learned any lessons in terms of strategic vision for sustainability. Darcee shared that one adjustment she made was having those conversations earlier and continuing to loop in new people. She shared that it is important to look at the key lessons learned and apply those lessons to sustainability.

**Question: Have you made any changes to your overall goals or vision regarding strategic vision for sustainability?**

- Ohio has plans to engage the employers in RETAIN services, as getting them to actively use RETAIN services is a key goal in making sustainability a success.

**Question: Where are you in your strategic vision for sustainability and how ready are you? What next steps do you want to see your team take?**

- Ohio said that its next step involves branding and marketing.
- Kentucky started meeting with the Department of Labor and working on refining data management systems to decide what it needs to keep and what it can get rid of. Kentucky will also work on branding, since it will change its name slightly. Kentucky is also developing a resource guide for employers. It is working with the Chamber of Commerce on training tools for employers to make the workplace more inclusive. Moreover, Kentucky will be part of an inclusive workforce summit where employers and providers come together and receive a full-day program that promotes an inclusive workforce.
- Vermont is exploring how to fund work-health coaching using a per-person rate for participating primary care clinics or employers.
- Kansas is working toward building an internal resource platform where more departments can be invested in the enrollment process and less siloed from the rest of the organization.