

## RETAIN Sustainability Workshop: Organizational Capacity—Notes

**Facilitator: Elena Soles**

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Elena facilitated introductions and an icebreaker with the question, "If you could do any Olympic sport, which one would it be?" Answers included snowboarding, Nordic skiing, track and field, and gymnastics. Afterward, she went over inclusive meeting guidelines and the agenda. Today's discussion focused on organizational capacity—defining what it means and reviewing a few key strategies, along with how it relates to sustainability.

### **Organizational Capacity and Strategies**

Elena described how organizational capacity fits into sustainability planning. The process begins with a preparing-to-plan stage, where readiness is assessed, followed by development of a strategic vision and reflection on past actions and financial resources. Next, the focus shifts to organizational capacity, considering risks and learning lessons from previous experiences. Organizational capacity is crucial because it involves the entire team at every level and stage to ensure the program runs smoothly. It also includes all the elements that help leverage resources and execute program specifics. Organizational capacity is part of a larger system of sustainability that also includes adaptability and flexibility, partner engagement, and strategic vision.

Elena then provided organizational capacity strategies for participants to consider. This includes identifying the program's strengths; where there is potential for expansion; and the current risks, such as political factors, environmental concerns, or financial issues. Other strategies include aligning key roles and responsibilities to support program goals, ensuring that functions are carried out effectively through partnerships, and considering how program activities are evolving to support long-term sustainability.

### **Participant Discussion**

Elena then asked participants whether they had considered any anticipated changes to the program.

- Kentucky shared that sustainability efforts are focused on the partnership with the Office of Vocational Rehabilitation (OVR), where part or all of the funding will be sourced. The state is looking to VR for information on the funding they will provide, which will guide future staffing decisions. OVR is a key partner now and will continue to be in the future. There is some overlap in the services delivered with the Office of Vocational Rehabilitation (OVR), though not all services are duplicated. RETAIN services are mostly a value add and will continue as much as possible after the grant ends. There are some potential funding opportunities in the near future, and the more funding secured, the better. This would help RETAIN keep current staff, as the

existing budget is directed toward staffing. The goal is to keep the current team, but it depends on how these funding opportunities materialize.

- Another state said its sustainability will be a continued relationship with its health care partners.

Elena then took participants through the assessing readiness tracker for organizational capacity. The tracker assesses readiness level using three categories: exploratory, in development, and prepared.

Elena then asked what participants have done to assess risks and opportunities that may affect sustainability.

- Kentucky said it is in the development stage for this step.
- Another state said it is still in the exploratory stage regarding this step.

Elena then asked have states have done to identify partner roles and duplication efforts.

- Speaking for Kentucky, Elena said it seems to be developed or even prepared in this step as it is fully aware of where OVR services overlap with their own services.

Elena then asked participants if they have evaluated strengths and limitations in consideration of anticipated changes.

- One state said it has significant limitations in staffing. This state noted that limited capacity is not unique to its local area; many organizations operate with tight resources. A significant part of that capacity relies on having staff in place; as funding disappears, so do the staff, which impacts organizational capacity. This state is assessing risks in an exploratory phase, still determining how to move forward. Some areas are in development, with efforts focused on building partnerships to reduce reliance on internal funding. With 95% of participants coming from medical partners, significant restructuring would take place if that changed.
- Kansas said its medical partners are exploring how to sustain the program on their own. The stateside program leader also is reaching out to other partners, such as dislocated worker programs and vocational rehabilitation, to help support RETAIN. There is still a lot of development happening at this time.

Elena asked Kansas to make a decision on funding using an environmental risk analysis from the RETAIN Sustainability toolkit.

- Using the environmental risk analysis, Kansas said the potential change to the program was the lack of grant funding at the end of the program, which will create critical and certain changes in supplies, staff, and just about everything else. Impact opportunity includes identifying additional funding sources.

For the program activity alignment section in the sustainability toolkit, Elena asked Kentucky to share its example in working with OVR.

- Kentucky is focusing on areas where program activities and goals are better suited through engagement with the OVR partnership. The transition component is key, and it's important to consider whether staff from both sides can meet the needs. At a detailed level, program activities should focus on current efforts while identifying the staff needed to support new transitions. In Kentucky, one initiative involves partnering with OVR to arrange joint training

sessions, where RETAIN and OVR staff train together to ensure a shared understanding of the services provided. Kentucky also has a strong relationship with the Chamber of Commerce, with ongoing collaboration to offer employer training. Strengthening partnerships and ensuring everyone is on the same page are central goals. Program activity alignment is happening through this partnership, with shared activities and shifting skill sets to create consistency across different program areas. These upcoming training sessions are seen as a key sustainability measure, helping to align efforts and build stronger connections between programs.