

Addressing Recruitment and Retention in VR

Indiana

Ron Vessell (RV): I'm going to suggest that we go straight to Theresa Koleszar from Indiana. Theresa.

Theresa Koleszar (TK): Thank you, Ron. All right. Well, thanks for all that great information. I'm happy to say I think we've been able to check a lot of those boxes in Indiana. So if you go to the next slide, I'm just going to briefly paint a picture for you of where we were about eight to ten years ago. I know that seems a long ways off, but our journey was very long. However, I think it was very successful. So hopefully you'll find something here useful. So back around eight or nine years ago, we had extremely high staff turnover, and particularly with our VR counselors, over 50%. So over half of our counselor positions were turning over at least once in a year, if not a couple of times. So very, very, very challenging, as you all know. And recruitment was possibly even more difficult. Finding qualified candidates was very challenging. We found that we were posting and then reposting the same position multiple times just to try to get a qualified candidate. And there were probably times we just hired the best option that was available and may not have ultimately been that great fit. So we really, really, really were struggling in that area. We also had then very high caseload sizes in some parts of the state. Those were averaging 150 or more participants per counselor, obviously way too high. That became even more of a challenge after WIOA was passed and all of the additional responsibilities that fall on counselors due to that. We have referrals that were, some growth in our referrals. So we were not able to really stop that train or slow that train down while we figured out our staffing. And it was really taking a long time for new referrals to even get an application appointment, which was really problematic. While we didn't have a formal waitlist at the time, we really kind of in effect did because it was taking a long time for people to get their intake and application appointment. Of course, we were struggling with timeliness standards around eligibility, IPE. We had some outdated processes. Again, this was back eight to 10 years ago, very manual burden, burdensome billing processes, a very old case management system that just wasn't very well aligned with the work that we were doing and where we were trying to meet people where they were in different community settings.

TK: So due to all of those staffing deficits or resource deficits and staffing, as well as a little bit of fiscal, this was around the time pre-employment transition services was coming out and the need to shift to that 15% of dollars. We made the very difficult decision and got the support of our leadership to enter into an order of selection in August of 2017, closing two of our three priority categories. Next slide. We then continued down a path of implementing a variety of strategies. We had already implemented several strategies, even leading up to that point, but obviously it was just not enough. We were not getting that traction. So we continue to do this today to constantly look at the assignment of our counties to our field offices, our positions to our field offices, and based on the ebb and flow that we all naturally see of new referrals coming in, we continue to make adjustments there. We continue again to shift positions and more often counties or coverage areas between offices just based on how that ebb and flow is

going. I don't think we'll ever not be doing that, but that always makes, you know, that can make a big impact. It also helps with some equity and people feeling like, you know, one office or one staff isn't always taking a higher burden than maybe another staff. So it also has an impact on that work culture. We created VR case coordinators. Some states call these, I think, rehab techs or different levels of maybe counselor positions. Our case coordinators were really designed to take some of the process-oriented tasks off of the counselor's plates. So dealing more with some of the billing, tracking down medical records, helping really facilitate people moving through the process so that our counselors could really focus more on the customer engagement and being counselors and providing that vocational guidance.

TK: We also created working lead counselors. We knew we were always going to have some degree of turnover, and that really does, you all know this, that really puts a burden on local offices. If you're fully staffed, maybe things are going really well, but as soon as one or two counselor positions turn over, it's not like you get a new counselor in the door the next day or the next month even, right? So someone has to cover that vacant caseload while that hiring process is happening. And if an office is only experiencing one vacancy, maybe that's doable once you start experiencing two and three, much less doable. So the initial idea with these working leads is that they would be able to go to those offices with the highest need based on, again, the number of vacancies and really try to cover those cases, at least in part, if not in full, so that that added burden wasn't going to those staff who were still here. Now, I'll talk a little bit about where our working leads are today, not to spoil the climax here of my presentation, but we have much improved our retention rate. And so now we've really shifted the role of our working leads to be more of trainers and mentors with our new staff, which again, still takes some of the burden off of the seasoned counselors and the local supervisor who are still very involved in training and onboarding new staff. But again, a lot of that can shift to that working lead to take on some of that training and still pop in to cover some cases.

TK: We also revised our training and onboarding process and just improved people's opportunity to access professional development. You know, the training process for a VR counselor can be very extensive and for good reason. And we really tried to rework that and continue to refine that. We have a wonderful, robust training team and training process that we'd love to. We're always happy to share information about that. That's another topic for another time. But we really tried to weed out the stuff that maybe wasn't as relevant and really hone in that training and spend some energy really making sure we had a good robust training process that was not just online modules, not just a week of training, and then you're on your own, but really folds in some mentoring, a lot of shadowing, a lot of meeting with different seasoned counselors who do really well at certain aspects of the job to pick up those best practices.

TK: We also, probably the biggest shift is that we revised our VR counselor positions to two designated roles, if you will. So historically, including my days as a counselor, one counselor did the whole thing, right, from intake to closure and everything in between. And we know there's a lot in between. We made a shift, again, about eight or nine years ago, where we decided that we were going to pilot and try this out and take some of our staff and move them into an intake eligibility role. And that's what they did. And then the other counselors moved them into a caseload counselor role. So development of the IPE, individual plan for employment, and forward. We piloted it to see if that would work. I myself had some concerns about it as a former counselor. The pilot was great. We ended up rolling it out. We took about a year or so

to roll it out across all of our 19 different field locations, and we've been going strong ever since.

TK: We also took some time to make sure we were doing some staff recognition. And that doesn't always have to be grand gestures. While we do financial spot bonuses on a quarterly basis, there's also a lot of other ways we all know that to recognize our staff. And it could be something as simple as acknowledging their great work in a staff meeting or bringing something to a director's attention or a team lead's attention and then that team lead reaching out personally and saying, thank you for doing the work that you do. One quick example, I try to read our customer satisfaction surveys at least three or four times a year. I try to grab a chunk of those that have come into me and review those. And if a participant has specifically named a counselor and something excellent that they've done, I will send an email to that counselor, CC their supervisor, their region manager, and just say, I wanted to share this with you. It made my day. I hope it makes yours. Thank you. Thank you for doing what you're doing. Excellent work. And that really, really goes a long way and doesn't have to take a lot of time to do that.

TK: We also did a lot of streamlining of our communication. We were either under communicating or over communicating. That's probably something we will always struggle with because communication is very difficult. It's just difficult, right? But we really tried to sit back, hear some hard feedback, and make some changes in how we get information and the pace that we get information out to our staff. Work culture, right? We didn't talk about work culture a whole lot 10 years ago. We talk a lot about work culture these days, right? So just paying some attention to that. What are our work environments look like? While we have a lot of work to do on some of our work spaces and environments, we've made a lot of progress. We recognize that where people go every day really matters, right? Their conditions, their office conditions, is parking difficult, all of those things. Those are really, really important not just for the folks we're serving, but certainly also for our staff and our teams. Speaking of staff and team, even just shifting some of our terminology, we're a team. It's not us and them. You're not the staff. You're the team, right? You're this office team or this VR team. So thinking of our approach as that team approach. I did office visits along with our field operations director and sat down for one or two hours with every single office, just created a safe space for people to share feedback. And then we had to act on that feedback, right? Providing opportunity for feedback. That's great. It's not good enough, right? We have to then make good on that feedback as it makes sense to do that. People notice that. People see that. That continues to create that trust and that safe space.

TK: So I could go on and on about work culture, but I'll move on, given our time here, and just mention that when we went into the order of selection, we really saw that. Certainly it was unfortunate. We had a lot of grief around that internally and externally, but it did serve as a little bit of a reset button for us, right? It gave us some of that space to slow down the train a little bit so we could fix, and I do mean fix, our foundation. And then we've done some salary adjustments. Not to put that last, but I put it last intentionally because, again, salary adjustments in isolation, you'll get some traction, but salary adjustments in combination with all of these other and probably many other factors. That's really where you'll maximize your efforts. Okay, next slide. So a lot of people are interested in how we went about the salary adjustments. So I'm just going to quickly go through. I said salary adjustments times two. So the first one we did was in fall of 2019, and this was a VR-specific approach. We worked with our

state personnel office, and quite frankly, we were able to get traction on this because we were in an order of selection and had a wait list, and there was great desire from our leadership, from our stakeholders, from our state budget agency in helping us to get out of that order of selection as soon as possible. So we were really able to leverage that and say, "We want that too, and here's what we need in order to do that." And of all the things we needed, one of them was certainly to look at our staff salaries. So our state personnel department did a kind of a national review of counselor salaries around the nation, and I think we were third from the bottom in terms of the starting salary and the average salary. So they very quickly saw, based on them doing their own research instead of us coming to them and saying, "Our salaries are too low." They saw it with their own eyes, right? They got that information on their own. They saw the inequity and the challenge. And the challenge in the past had been with shifting is that our counselor classification was tied to a generic classification that was also used across multiple other state agencies. So you couldn't just change it for us without that classification changing and that salary or that class changing across the whole state. So state personnel was able to break out and create our own unique set of classification and levels just for VR. So when we look at our state of Indiana job classifications, you'll see all these generic ones, and then you'll see VR counselor, VR counselor supervisor, you know, VR counselor, you'll see our specific classifications. And that enabled us to tie then a unique set of salaries to those classifications. So through that, we also created a VR counselor trainee. When people come in new, they come in as a trainee, and then they go through about an eight or nine month initial training process. And as long as they're making satisfactory progress, we have it set up where it's pretty automatic, where they would promote then into a full VR counselor role. And that comes with a salary increase of about at the time, about about a \$4,000 salary increase. We also, in addition to raising that starting salary, of course, we wanted to address salaries of those staff already on board. So every counselor received a salary adjustment in 2019. Based on these changes, that amounted to either that new salary or at least a 10% increase in their current salary. Now that had some compression impact. So then we also had to adjust that kind of trickling up from there. We also had to adjust VR supervisor and region manager salaries as well. All right, next slide.

TK: In 2022, we were very, very fortunate that our state conducted a statewide compensation study, because there was a lot of challenge with retention and recruitment around the state. While we had seen some great improvements in VR, we were kind of unique. Most of the state agencies in Indiana were still seeing a lot of, again, turnover and challenges with, with recruiting folks. So after a study, there was an additional, there was a compensation adjustment for nearly all state positions. So again, not just VR, nearly all state positions in 2022. And that resulted in another very significant salary adjustment for our counselors. It amounted to about a 35 to 40% salary adjustment for our counselors. Also adjusted those positions on up, but not quite as, as to that, to that degree. So that was fantastic. We were able to retain all of the changes we made to our classification and our structure with this. And while previous efforts really helped our retention, they didn't do a ton for recruitment. That all changed in 2022. Our VR office supervisors have reported that the volume and quality of candidates applying for VR counselor positions has just notably, notably changed. And so recruitment has definitely gotten much, much easier for us. Okay.

TK: And then I have one more quick slide. Just a quick takeaways. Where we are today, I pulled the data last week. We are, our turnover is 13%, which means our retention is 87%. We are, we are thrilled with that. It's actually, our turnover has actually been as, as low as 9% over the last

few years. So we're, we're pretty pleased there. I mentioned that we were able to leverage being in that order of selection and having that waiting list. That's helped us. We were also able to leverage, hey, we are not meeting these timeliness standards. We have this monitoring in 2017. That raised some issues here. We need to make some improvements here. So definitely while audits and monitoring and making hard decisions like order of selection are difficult, I think there's some opportunity to leverage those things to help get some traction where maybe you otherwise can't get that traction. Repair the foundation. If you're, if you're toying with whether you put your energy behind retention or recruiting, I say retention. You really got to fix the foundation. If you just add more positions or try to reach out to new people but don't fix the ability for people to kind of stay with you, I think that, I think you may be doing it a little bit backward. So if you can't do both at the same time, you know, fix, fix the, try to address retention first. Again, the multi-prong approach we talked about and share the value of the benefits package in interviews. So the salary right now is much better than it was in the past. But once you add the financial value of the fringe benefits, the paid time off, you know, the fact that we have a 37 and a half hour work week in Indiana versus a 40, that really can add up and show people the value, the financial value of the position. With that, I'm going to turn it over to Dee.