

# Oregon Commission for the Blind: Progressive Employment Model Replication and Evaluation 2019 Working Paper



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## **Oregon Commission for the Blind: Progressive Employment Model Replication and Evaluation : 2019 Working Paper**

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The data, information, and views expressed herein do not necessarily represent the overall findings or outcomes of the ongoing Progressive Employment Model Replication and Evaluation study. This working paper series is meant to provide preliminary information and document the process and impact of the model implementation in various state agencies. These papers will be updated as the research progresses to reflect new data and findings.

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# TABLE OF CONTENTS

Overview ..... 5

Adopting Progressive Employment ..... 5

Progress, Outcomes, and Costs ..... 6

Observations of PE Implementation..... 7

Data Overview ..... 11

Recommended Next Steps ..... 15

Conclusion ..... 17

Appendix ..... 18



## OVERVIEW

Since implementation of the Workforce Innovation and Opportunity Act (WIOA), the Oregon Commission for the Blind (OCB) has invested heavily in enhancing employment services by increasing business relations capacity, hiring more assistive technology specialists, embedding OCB staff in workforce centers, and contracting with a large number of vendors providing employment services. OCB became a replication site for the Vermont-based Progressive Employment (PE) model and began enrolling job seekers in August 2015. The commission also participated in intensive technical assistance with the Job-Driven Technical Assistance Center between 2016 and 2018.

Participation in these two federally funded projects enabled OCB to do the following:

- Expand the number of business relations personnel from one full-time employee to five full-time employees (including a manager of the unit).
- Increase the number of contracted vendors from 12 to 72.
- Create business engagement teams within the career centers. Business engagement teams include a business relations vocational rehabilitation (VR) staff member and an assistive technology (AT) staff member.
- Create a database to track business engagement activities through the Job-Driven Vocational Rehabilitation Technical Assistance Center, or JD-VRTAC
- Eliminate homemaker closures funded by the federal VR grant.
- Build capacity to provide AT services in general.
- Work with Oregon General and Washington Blind VR agencies to partner with businesses.
- Replicate an adult work-based learning model (Progressive Employment) with over 70 OCB clients.
- Participate in the PE Learning Collaborative with Vermont, Maine, and Nebraska General Agencies also implementing PE.

## ADOPTING PROGRESSIVE EMPLOYMENT

The OCB partnered with the Institute for Community Inclusion at the University of Massachusetts Boston and the Vermont Division of Vocational Rehabilitation to launch Progressive Employment in Oregon. ICI analyzed 2017 data and provided the first iteration of this model replication report in January 2018. A brief version of this report can be found on [ExploreVR.org](http://ExploreVR.org).<sup>1</sup>

OCB is a relatively small VR agency in which approximately 10 counselors cover the entire state of Oregon. OCB's intent was to pilot the project with 25 clients who had open cases and were "stuck" as determined by the clinical judgment of the counselor. During the first year, OCB expanded the target population to include 71 clients with any combination of the following characteristics:

- Had been receiving OCB services for two or more years without a recent activity or progress.
- Were nearing completion of a skills training without a clear idea of intended work.
- Were out of the workforce for an extended period of time.
- Were students seeking work experiences.

The 71 PE clients received a range of work-based learning experiences, including paid short-term positions (n = 32), informational interviews (n = 32), company tours (n= 20), work assessments (n= 13), or job shadows (n=9).<sup>2</sup> During the evaluation time period, 23 out of the 71 clients had their cases closed with 19 of those closed into employment.

<sup>1</sup> Institute for Community Inclusion. (2018). "At a Glance: Progressive Employment in Oregon." [www.explorevr.org/glance-progressive-employment-oregon](http://www.explorevr.org/glance-progressive-employment-oregon)

<sup>2</sup> Progressive employment activity data was reported for 55 of the 71 clients in PE.

## PROGRESS, OUTCOMES, AND COSTS

The ICI received three years of funding from the National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) to extend work on the study of PE. In December 2017, OCB attended the kick-off PE Learning Collaborative meeting with the other state VR agencies. Each agency agreed to provide additional data in late spring 2018 for an additional wave of impact analyses, which informed this report.

OCB was also participating in intensive TA with the JD-VRTAC (whose work is funded by the Rehabilitation Services Administration) to construct a data collection strategy for business engagement activities and to increase vendor capacity. The ICI team (Foley, Haines, and Moore) conducted a site visit to OCB in July 2018. The day-and-a-half agenda included:

- PE leadership team meeting
- Small group discussions with community rehabilitation providers (CRPs), VR counselors (VRCs), and business relations coordinators
- Observation of a Progressive Employment Jobsville meeting of VR counselors, CRPs, business relations coordinators to discuss successes, referrals, challenging cases, and local labor market information
- Data discussion with OCB case management system (known as System 7) data staff, as well as VRCs and business relations coordinators overseeing PE data collection

In August 2018, OCB participated in the ICI-hosted Progressive Employment Learning Collaborative meeting for all replication sites involved in the study. Additionally, in summer 2018, OCB provided the ICI with PE case file data for analysis.

OCB raised cost concerns in that they were seeing job development costs increase beyond what they expected. However, it was unclear if this was due to implementing PE, increasing vendors, or eliminating homemaker closures as options.

ICI was interested in understanding the adaptations that OCB made to fit the PE model into a blind agency that is geographically dispersed. Several adaptations were noted:

- Other PE-adopting states created Jobsville or meetings in local areas of the state, and included cross-functional teams (counselors, employment specialists, business account managers, and others). OCB took a statewide approach in which counselors, business relations coordinators, and vendor personnel attended in person or by phone.
- OCB, like Maine, funded vendors to provide employment specialist and job placement services. OCB started with 12 contracted vendors and expanded the number to 72 during the life of the project. OCB contracts are fee-for-service contracts.

Overall, OCB continues to embrace the philosophy of PE. A number of positive changes have been reported by OCB since the PE inception, and it is clear that more clients are receiving services that will improve their chances for a timely successful VR outcome.

To fit the Vermont PE model into OCB, a number of adaptations were implemented. As observed in Oregon, PE seems to have become synonymous with “job development” both in terms of the referral process to PE and with regard to service delivery (work-based learning experiences) standing in as the only differentiating component of the PE vs. non-PE clients. Several structural components of model implementation have shifted or are no longer in place. OCB increased the number of BAMS to create a team and embedded them within career centers with a partnering

AT staff member. This is a major capacity-building effort, but it also reduces the hours the BAMs are interacting directly with businesses.

The following section details key OCB procedures and the alignment with the PE model.

## OBSERVATIONS OF PE IMPLEMENTATION

### PE Services / Dual-Customer Approach

One of the hallmarks of the PE Dual Customer Approach is investment in Business Account Manager (BAM) capacity. BAMs are employees who carry a business caseload and spend the majority of their time working directly on location with businesses.

- OCB currently employs two full-time equivalent (FTE) BAMs (referred to as Business Relations Coordinators, or BRCs). BRCs carry no consumer caseload but spend a small percentage of their time in the field with businesses. These staffers are now co-located at WorkSource offices in the field in central OR. They are responsible for CRP onboarding for PE, but also to OCB overall, including orientation to serving clients with blindness/visual impairment. The BRC manager is a WIOA coordinator. OCB has the authority to hire additional full-time BRCs, but due to budget constraints will not fill these positions.
- BRCs and job developers (JDs) seem to be interested in building business contacts, but this is not typically referred to as discovering and filling business needs. There is more job seeker focus on PE activities, and also placement. This differs from the VT PE model where businesses are also viewed as customers.
- No single database exists on businesses and their willingness to provide work-based learning experiences to OCB consumers, and CRPs are reported to be protective of their business lists so that they are not shared.

### Collaboration and Team Approach

A key element of the PE model is to establish a highly collaborative approach across teams and organizations to share actionable information about local business needs and the interests of job seekers. OCB, like Maine, relies upon a large number of vendors to provide employment supports. With such a service delivery system, collaboration is more intentional and planned because vendors and VR agencies do not share data systems, have infrequent contact, and communicate on a case-by-case basis rather than as a network serving a local community.

- Jobsville meetings are held weekly. However, less than 50% of Jobsville attendees (excluding the facilitator) participated in the Jobsville discussion observed during the site visit.
  - » One JD offered labor market information, along with three VR staff (two BRCs and one admin). Three or four staff members offered PE client success stories, and two or three contributed to a discussion of a challenging case. The meeting included approximately 12 people in person and 11 on the phone. Most of the CRP representatives were new vendors or new staff of vendors, had not yet gotten a referral, and were not familiar with the PE model. Several of the meeting attendees were using computers/phones throughout the meeting and did not participate in discussion.
  - » OCB is no longer paying JDs to attend Jobsville meetings. As a way to engage JDs, BRCs have started to schedule JD topical trainings during the last Jobsville meetings each month to make it worth people's time to attend.
  - » Only one challenging case was discussed, and the "solutions" mentioned were not in

keeping with PE principles (e.g., “If this placement doesn’t work out, it will take another 2.5 years to get another”). In PE, the time frame would be weeks or at the most a month for alternatives to be tried. The issues in the case seem to be a result of a vendor staff that abruptly terminated a job placement without a team discussion and may have “burned” the relationship with the employer. It was unclear if the work issue was because of the job seeker or because a job coach was not able to perform effectively. The OCB may be risking its relationships with businesses because of limited capacity of vendors and job coaching personnel.

- BRCs reported that JDs may not want to bring challenges to the Jobsville meetings in order to preserve their perceived reputation with the VRCs (i.e., they don’t want to look bad in front of the boss). OCB has a small number of counselors who are covering a large geographic area. About two years ago, OCB reported that there were about 12 vendors participating in PE. Because of this, OCB created a statewide Jobsville meeting in which some people are participating in person and others are on the phone. Jobsville has been led by a lead agency staff. Our observations indicated that this may be having a reverse effect on communication and interaction, as we saw that the majority of attendees did not participate. OCB may want to consider moving to a localized or regional approach to Jobsville in which most attendees are in person and there are more detailed conversations about the local labor market. Identifying a key staff member like a BAM, VRC, or JD to lead the meetings may allow for more buy-in of staff in the discussions.
- In discussions during the site visit and with OCB staff and vendors, it was reported to us that it is rare that referrals are actually shared in Jobsville. Instead, CRPs are contacted individually and given cases by VRCs. Several VRCs indicated that they did not want to “give up their counselor prerogative” to determine the best vendor, and others indicated that they had concerns about the competency of vendors present at the Jobsville meetings. At the Jobsville meeting attended by ICI, there were no referrals. However, vendors stated that their reason for attending Jobsville was to get referrals. They mentioned that sometimes after meetings in private conversations with VRCs, they would receive a referral. Three of five CRPs at the Jobsville meeting who stayed after for the discussion with ICI have never had an OCB referral. The fourth has only had one referral.
- Referral from VRCs to JDs happens outside of Jobsville to preserve VRC control over the JD selected to provide services, rather than in a Jobsville model where a client would “go to auction.” Occasionally VRCs cited client choice as a rationale for this; more often, they expressed a preference for selecting JDs directly based on their personal relationships and opinions about JD competency and quality of work. In this sense, Jobsville served initially to introduce JDs to VRCs, but the mechanisms for supporting ongoing relationship-building via Jobsville is unclear because there was relatively low participation rate in the Jobsville discussion.
- Labor market information (LMI) shared in Jobsville appears to be taken from state or other databases rather than direct contact with businesses. LMI may be dated or marginally appropriate for clientele as a result. It seemed to ICI that the BAMs were no longer talking directly with businesses. At least one vendor provided information about local opportunities and inquired about federal jobs.
- The statewide nature of Jobsville makes some discussion of local labor market information or specific client updates less of a priority because the information does not apply to everyone in attendance.





## Consumer Engagement

- Information about PE case status and services provided appear not to be followed very closely, or records are not accessed by VRCs. Since no new clients appear to have been referred to PE for some time, it is unclear what this will do for future client engagement. Conversely, OCB staff report that all clients are considered to be in PE. This is confusing and contradicts information in the PE database.
- Referrals to PE through the traditional Jobsville mechanism have dropped significantly; yet according to OCB, “everyone” who is referred to JDs for job development assistance is “getting PE.” From a JD point of view, whether a client is in PE is determined through a conversation with the VRC about what types of JD services a client needs.
- It is unclear if JDs meet consumers close to the time they are eligible for VR services or receive an Individualized Plan for Employment (IPE).

## Leadership and Programmatic Support

The PE model is a systems approach rather than a counselor-level practice. OCB has adopted, expanded, and adapted the principles and values of the Vermont PE model and see it as a way to align multiple capacity building efforts with WIOA and with an employment-oriented agency. This is a significant change from its history and heavy reliance on homemaker closures. OCB reported increases in financial investment in employment services such as job development and raised concerns about the affordability of the PE model over time.

- Leadership and programmatic support for the PE philosophy of “everyone is ready for something” is consistently expressed by OCB staff.
- Funding is perceived to be insufficient to complete targeted PE activities. Administrative staff are concerned about the perceived escalating costs of PE due to increases in dollars spent on job development in recent months. CRP rates have increased due to building capacity. Also, OCB's elimination of homemaker closures may have increased the number of cases referred for JD, adding to the overall agency expenditures in JD. (See tables 4 and 6 for data comparing OCB case costs with all other blind VR agencies.)
- VRCs are now more closely monitoring JD work and instructing JDs to scale back or show results. For example, VRCs reported less tolerance of multiple low-dose PE activities or long-term work experiences, especially if there is no chance of a hire resulting in the conclusion of the work experience. OCB leadership reported that the CFO raised concerns about quadrupling the JD budget. The result was that OCB leadership asked counselors to monitor new JD activity and cap JD hours at 10 per customer. OCB leadership staff will then approve additional activities on a case-by-case basis.
- VRCs also made statements that indicated they may not fully understand the purpose and activities of PE, for example, “I'm not referring that person to PE because he is not ready,” and “If this job fails, we will have to put the person in two and a half years of PE before we find another job.”
- ICI inquired about training and onboarding and learned that BRCs are responsible for onboarding to PE and reported providing regular trainings in groups and individually, particularly for new CRPs. The CRPs reported that they had not received any formal training in PE, and they could not articulate any of the tenets of PE other than the concept that trying out work prior to hiring is good for the client as well as the employer. The CRP attendees were job placement and job coach staff who may not be as informed as CRP leadership. It also appeared that about half of the CRP staff were relatively new to the field or new hires. ICI heard that JDs receive

a PE packet and phone consult with BRCs. Some group sessions for JDs are set for monthly Jobsville meetings, and VRCs receive group presentations on PE two times per year. As OCB has dramatically increased the number of CRPs approved as vendors (from 12 to 72), the training demands may be significant. One question may be whether or not all vendors participate in PE, or if there may be additional qualifications and training required. This may need to be a priority as vendors and job placement personnel are on the front line with businesses. To what extent are vendors representing the philosophical and dual-customer focus of OCB?

- » BRCs report new vendors needing much more than PE orientation, and have also spent time providing an introduction to OCB and specifically pointed out a significant need for building vendor knowledge of AT. Many of the new vendors have limited to no experience serving job seekers who are blind or visually impaired. To some extent, BRCs are acting as training agents of OCB. This may have hidden costs, such as limiting BRCs' time spent interacting with businesses.

## Data Collection

Effective implementation of PE requires data collection, not just for purposes of the research but also to inform the team about job seekers in the pipeline, their activities, business interactions and needs, and to what extent there is progress. OCB staff have developed spreadsheets and databases to collect data on PE such as client data, business interactions, CRP activities, and work experiences. ICI appreciates the willingness of OCB to track this information. However, OCB may have limited ability to accurately measure or forecast vendor activity, which could create vulnerabilities in determining returns on investment.

- Following the first wave of data provided to the ICI in 2017, the data collection and tracking additional referrals decreased.
- Less than 100% (actual figure is unknown) of clients “in PE” are flagged in System 7 as being in PE. PE activity tracking sheets are provided for some of PE clients to date. For example, of the 12 clients “in PE” reported by one counselor, the BRC reported having received 5 PE activity tracking sheets from JDs. The PE activity tracking sheet is perceived to be a data collection mechanism mainly for the ICI's PE study, and the information is not reviewed or used by OCB—with the exception of the newly created “business name” field recently added by the BRCs to track JD contact with area businesses and inform BRC activity.
- Data on PE services is difficult to interpret, and some CRPs use their own forms for reporting information on overall job development activities. Some forms group more than one client on the form, and others include lists of clients.
- JDs in the small group discussion were all aware of the PE activity tracking sheet (but only one had PE clients and used the form; all other JDs had no PE referrals to date).
- In some cases, VRCs provide PE activities—or possibly only “job readiness” activities. If, in fact, a VRC is providing a true PE activity, there is no mechanism to track this.
- Incomplete data and data input irregularities by CRPs (irregularities on individual PE services) and VRCs (designating who is or is not in PE) will make comprehensive evaluation of PE impacts and costs very difficult. At a basic level, it is unclear who is in PE and what work-based learning PE activities were completed by PE participants.

## DATA OVERVIEW

Following the site visit, ICI and OCB worked together to query System 7 and examine key variables related to case costs, PE status and links to PE-related data collection, and employment outcomes. The ICI is focusing primarily on the cohort of 71 cases identified as “in PE” as of June 2017, and is following along to monitor outcomes for this cohort. Data for one case is missing in some instances, therefore the N is noted at 70.

OCB provided the ICI with several data files for analysis. These included:

- 1) A PE client list with two sections:
  - a) PE clients in open VR status as of August 2018 (n=46)
  - b) PE clients in closed VR status as of August 2018 (n=32)
- 2) Four quarters of case file data for all open and closed VR clients in the application date range of 8-1-15 through 6-30-18 (n=478)

To provide an update on the cohort of PE cases, the ICI looked at the VR status of each customer in 2017 and 2018. The following table shows the total number of PE clients in each VR status in 2017 in the first column; the clients' 2018 VR status is then documented by status category to show how client status has changed in the table columns. This information is also presented in a bar graph following the table.

**Table 1. Summary of PE Case Status by Case ID for 2017 and 2018 (n=70)**

VR Status 2017	N	VR Status 2018										
		IPE complete	Training	Ready to Work	In Employment	Services Interrupted	Rehabilitation	Closed: Not Rehabilitated	Closed Before Rehabilitated	Post-Employment	Closed from Pre-Service Listing	Missing
Applicant	1		1									
Eligibility (Acceptance)	2		1		1							
Training	32		15	1	5		6	4		1		
Ready to Work	14	1		4	4		2	2				1
In Employment	8			1	3		4					
Services Interrupted	3			1		1	1					
Rehabilitation	5						4			1		
Closed: Not Rehabilitated	2							2				
Closed Before Rehabilitated	1								1			
Closed from Pre-Service Listing	2										2	
<b>Total</b>	<b>70</b>	<b>1</b>	<b>17</b>	<b>7</b>	<b>13</b>	<b>1</b>	<b>17</b>	<b>8</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>1</b>

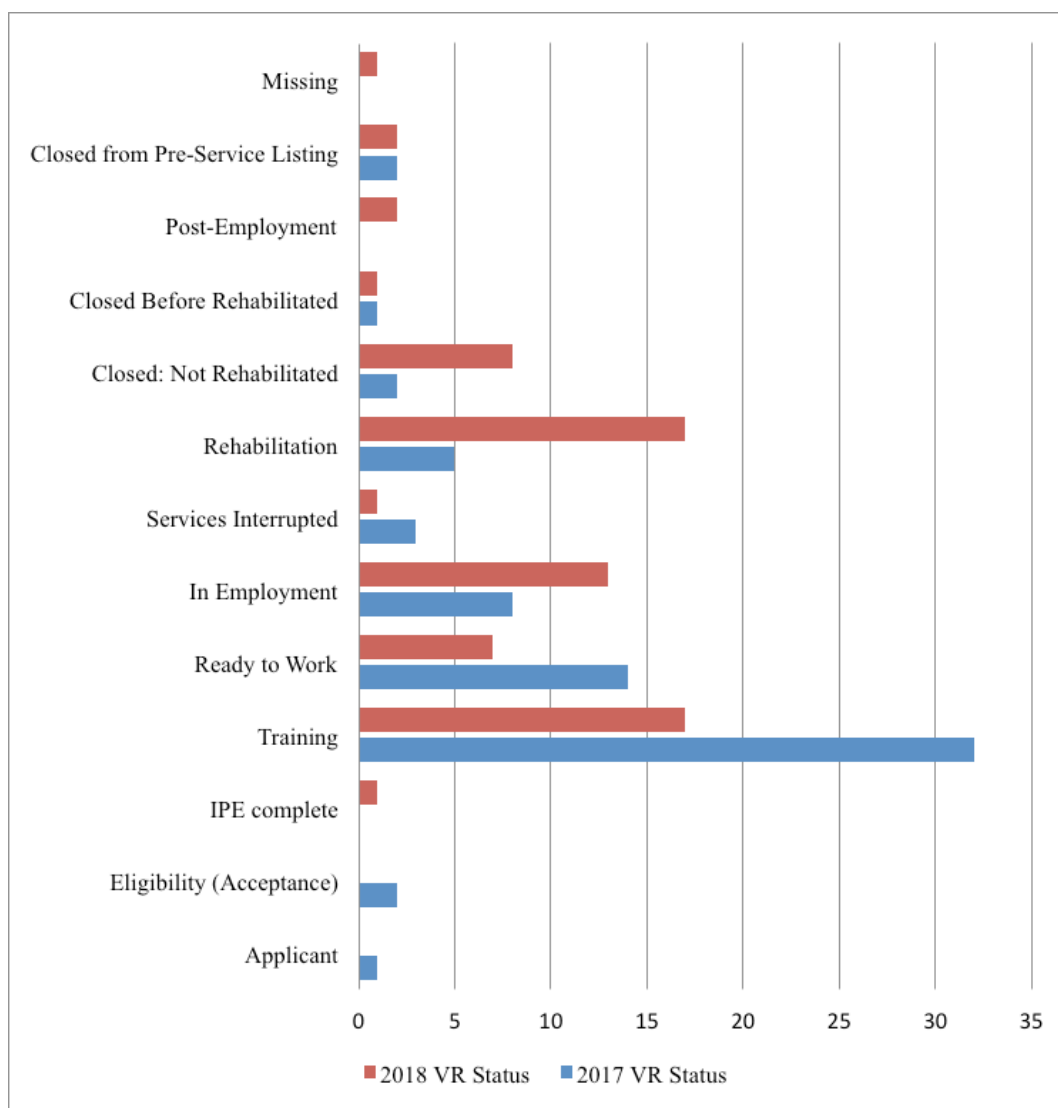
This table shows that individuals in PE are moving through the rehabilitation process. For example, in 2017, 32 PE clients were in the “Training” status, and over the course of the year, five moved into employment and six were closed into rehabilitation status. In 2018, a total of five PE clients were documented as in the “Rehabilitation” status, and this number has climbed to 17 in the 2018 data.

Overall, this table suggests that PE cases are progressing toward rehabilitation status and there are

very few PE clients that are closed either “not rehabilitated” or “before rehabilitated.” The following chart displays this data visually in a bar graph with top red bars representing the number of clients in a given status in 2018 status and the bottom blue bars representing the number of clients in that status in 2017.

The graph illustrates that PE clients overall are progressing through the rehabilitation process as the red 2018 figures are more heavily concentrated in the later stages of the rehabilitation process (cases in employment; closed cases) versus the blue 2017 figures, which are more heavily concentrated in the earlier stages of training and ready to work status.

**Figure 1. VR Status of PE Clients Served by OCB in 2017 and 2018**



OCB also provided case cost data for all open and closed VR cases in the application date range of 8-1-15 through 6-30-18 (n=478). This cohort includes 27 PE cases and 451 non-PE cases. Because of the date range parameters, this cohort of VR cases only includes relatively recent applications; cases with a longer VR tenure were not included.

When PE was rolled out, OCB elected to enroll “stuck cases” in which a person had tried multiple times or had multiple years of VR services but was not moving forward into employment. The

thought was that this group could benefit greatly from PE. OCB was also switching off of including homemaker cases, and had significant concern about what would happen for their Title 1 VR clients. However, this critical need group may have applied for services in such a wide range of years that it would be challenging to identify a suitable comparison group to assess costs.

OCB raised cost issues because they were rising and may also be a result of multiple changes such as WIOA requirements, PE adoption, and vendor enrollment. We limited the group to those who applied to VR from August 1, 2015 to June 30, 2018 as a way to have a consistent comparison group.

The following table provides a snapshot of job placement assistance costs and total VR funds for all cases (open and closed, PE and non-PE) for the 478 clients in the dataset.

**Table 2. Cost comparison snap shot**

Overall Cost Comparison	Total Job Placement Assistance Cost		Total VR Funds	
	Median	Mean	Median	Mean
Non-PE (N=451)	\$ 1,593.00	\$ 2,312.87	\$ 1,522.00	\$ 3,072.40
PE (N=27)	\$ 2,656.50	\$ 5,221.94	\$ 5,284.00	\$ 6,105.08

Note: The mean and median for Total Job Placement Assistance Cost and Total VR Funds among Non-PE clients were calculated based on 75 and 200 valid cases respectively.

For all measures, the mean costs are higher than the median costs, indicating that a small number of higher-cost cases increase the average (mean) reported. In general, PE cases cost more than non-PE cases for job placement assistance and overall for total VR funds. As more data becomes available, it will be important to examine whether PE case costs have a wide range or variation from case to case, and to compare those figures to similar non-PE cases using a matching technique.

In the next table, we report the median and mean total costs for the 27 PE cases by VR status. As clients progress through the rehabilitation process (from IPE through training, ready to work, and in employment status) costs steadily increase to a median total of just over \$4,000. For PE clients with “Rehabilitation” status (n=4), the median cost is \$4,983 and the mean cost is \$7,230, again suggesting a wide range of case costs. For the two cases that closed “not rehabilitated,” the median cost is nearly double that of the rehabilitated cases: over \$9,000.

**Table 3. Total Costs for PE Clients by VR Case Status (n=27)**

VR Status of PE Clients (n=27)	Total Cost	
	Median	Mean
IPE Complete (n=1)	.00	.00
Training (n=10)	670.50	2736.70
Ready to Work (n=5)	3609.50	4174.50
In Employment (n=5)	4174.50	6891.25
Rehabilitation (n=4)	4983.00	7229.60
Closed: Not Rehabilitated (n=2)	9149.00	9418.60

To put these figures into context, the ICI also examined RSA-911 data for state agencies serving clients with blindness and visual impairments.

The following table shows the total mean and median VR funds and job placement VR funds for Oregon compared all other states for the years 2014, 2015, and 2016. The costs are reported by closure type (closed as applicants, closed before IPE, successful closure, and unsuccessful closure).

Overall, Oregon costs were on par with the national averages across the three years, with one notable exception. In 2015 and 2016, Oregon's costs for unsuccessful case closures rose significantly while the national average remained steady. An additional table with state-specific comparison data for six states serving comparable numbers of clients who are blind/visually impaired is included in the appendix.

**Table 4. Comparison of Case Costs by Closure Status for Oregon and All Other States Serving Individuals who are Blind / Visually Impaired**

Closure Type	Year	State	N	Total VR Funds Median	Total VR Funds Mean	Job Placement VR Funds Median	Job Placement VR Funds Mean
Closed As Applicants	2014	Oregon	31	373.00	373.43		
		All Others	2514	186.00	758.04		
	2015	Oregon	25	100.00	2345.73		
		All Others	1835	199.00	508.91	0.00	125.00
	2016	Oregon	28	341.50	376.40		
		All Others	1525	215.00	457.52	580.00	580.00
Closed Before IPE	2014	Oregon	28	378.00	1446.14		
		All Others	1462	752.00	3313.95	405.00	491.00
	2015	Oregon	98	444.00	1310.90		
		All Others	1803	277.00	1961.45	0.00	61.22
	2016	Oregon	69	408.00	658.48		
		All Others	1608	215.00	1367.02	0.00	8.14
Successful Closure	2014	Oregon	79	5598.00	8148.99		
		All Others	6210	4554.00	8336.43	2708.00	3411.11
	2015	Oregon	138	4517.00	6869.61	1000.00	1007.25
		All Others	6404	4246.00	8933.56	2500.00	3147.30
	2016	Oregon	72	4504.50	7835.38	1727.50	2011.36
		All Others	6012	4381.00	9369.61	2833.00	3106.13
Unsuccessful Closure	2014	Oregon	21	2712.50	5973.65		
		All Others	2953	3480.50	7413.95	850.00	1427.38
	2015	Oregon	59	4462.00	11218.97	2000.00	1825.00
		All Others	3191	3144.00	7285.77	600.00	1113.31
	2016	Oregon	60	5128.00	10120.17	1120.00	1802.09
		All Others	3272	3116.00	7322.45	500.00	1000.19

Note: Blank cells indicate data is not available.

Data Source: RSA 911 (FY 2014; 2015\*; 2016\*) Note: Data from 2017 is being cleaned and is not immediately available to ICI. PE services and data collection at OCB started in the third quarter of 2016.

\*Type of agency variable was not available in 2015 and 2016. Clients with Blindness and Visual impairment who resided in a state with a Blind agency were selected.



For the four PE cases that closed successfully, the median and mean costs (\$4,983 and \$7,230) are consistent with the median and mean costs for all successful case closures in Oregon in 2016 (\$4,505 and \$7,835) and the national averages for 2016 (\$4,381 and \$9,370).

Job placement costs are also included in the table above for 2015 and 2016 when available. These data indicate that Oregon's job placement costs in 2015 and 2016 were less than the national averages for successful closures. For unsuccessful closures, Oregon's job placement costs were about twice as high as the national averages.

## RECOMMENDED NEXT STEPS

OCB administrative staff remain positive about the overall changes at agency since the rollout of PE, and they are enthusiastic about the potential for continued future improvements of client services. Following along the original cohort of 71 PE clients, VR case status data shows progress toward successful rehabilitation. Overall, 39 of the 70 PE cases for which data is available remain open (55.7%). A total of 17 cases are reported as rehabilitated, and two are in post-employment status. Eleven PE cases have closed unsuccessfully (not rehabilitated, before rehabilitation, or pre-service). In sum, over 60% of the closed PE cases (17 of 28) have been successful in achieving employment outcomes.

The VR case status variable was not available for the 451 non-PE cases, but a comparable variable "VR Exit Type" indicates that there were 98 closed non-PE cases, of which 11 cases had exited with an employment outcome (11 of 98, or 11%). It will be important to obtain the same variables for both PE and non-PE cases for future comparisons of this nature in order to determine the impact of PE on employment outcomes.

The enthusiasm for PE is somewhat mitigated by concerns for the expenditures associated with delivery of PE services. In regard to this concern, the tables in this report indicate that OCB is approximately the same or lower in median case costs with other agencies serving those who are blind or visually impaired. Furthermore, the PE cases that have successfully closed incur costs that are on par with both Oregon's cost trends since 2014 as well as the national averages.

One area where the median is higher in Oregon is the total costs associated with cases that close unsuccessfully. This is not, or at least should not be, associated specifically with PE. It is recommended that the agency undertake a more thorough assessment of the reasons for these costs being higher and consider actions that could lower these costs.

One problem in comparing PE vs non-PE expenses is defining who is in the model and who is not. The data available to ICI suggest that there are only 71 individuals who have received or will be receiving PE services; however, comments during our meetings suggested that counselors consider all clientele who receive any job placement services to be in PE. It is important for OCB to express clarity to VRCs and CRPs about PE vs. job development or job placement services.

Further clouding the case cost issue is the rapid transformation of the agency away from homemaker closures. Competitive employment closures may cost more case service funding than homemaker closures. In other states where transition from a large percent of homemaker closures has occurred, this has impacted their case costs as well. For example, in Massachusetts, the case costs appear comparable to OCB costs at this time.

It is difficult to clearly delineate the impact of PE among other shifts at the agency that occurred during the same period: the elimination of homemaker closures, OCB's substantial effort to increase

vendor capacity, and shifts in the BRC role. Because PE is now seemingly synonymous with job development (i.e., all individuals referred to job development/job placement are getting PE), it might be that PE is perceived to be the reason for an increase in cost per case.

JD reimbursement structure uses a fee-for-service model which pays hourly rates for all job development work, including uncapped PE services. Some examples were given with case costs as high as \$35K, which was flagged by a counselor and brought to leadership as an extreme case; notably, this particular case resulted in a successful employment outcome. This leads to the question: What is a reasonable case cost, and how is this determined?

OCB has faced some interesting and unusual challenges for implementing PE, especially given its large geographic territory and limited staff. One challenge has been how to configure Jobsville. Consider if the current volume supports having two or more Jobsville meetings that are divided by region. Rotate leadership of Jobsville to front-line personnel with an eye toward choosing leaders who are respected, organized, and knowledgeable about VR clientele. OCB is breaking new ground with the changes they have implemented, and are encouraged to continue exploring ways to fine-tune their interpretation of this model.

The ICI is also continuing work on measuring fidelity to the PE model to learn more about the relative weight of each model component and correlation to outcomes. There may also be model components or implementation strategies specific to agencies serving those who are blind/visually impaired that differ from general agencies.

The ICI recommends the following next steps to reboot PE overall and reinstate structures that have fallen away from the model as prescribed:

1. Conduct in-depth retraining on PE for VRCs, CRPs, and administrators in partnership with ICI.
2. Repackage data collection processes. ICI can create and host a web-based data collection portal that OCB and CRPs access for streamlined and uniform PE data collection.
3. Require JD information on all cases prior to CRP reimbursement, PE or not.
4. Make all referrals in Jobsville meetings, not after or before meetings.
5. Enable BAMs to create business leads directly.
6. Conduct a separate training for VRCs on how they can become meaningful partners in PE.
7. Rotate leadership of Jobsville to front-line personnel, such as BRCs, VRCs, or CRPs.



## CONCLUSION

The ICI is grateful for OCB's participation in the Progressive Employment model. It appears that OCB made many major infrastructure, staffing, contracting, and systems changes to emphasize business relations and employment services provision, and to increase its investment in vendors. Adoption of PE by OCB was as much a philosophical decision as a practice orientation.

Noticeable from ICI's perspective is the degree of staffing changes that have happened since implementation in 2015. OCB employs about 10 VRCs, with most of them new since the start of PE. OCB shifted from one to two full-time BRCs, and developed the workforce team, hiring a workforce innovation manager to run that team. OCB added a new assistive technology instructor to the Redmond office, and the three other AT instructors in Salem, Eugene, and Medford were also brought into the workforce team. OCB also brought the AT-Information Systems Specialist in Portland on to this team. An increase in AT personnel is a major investment and one that has obvious benefits for customers. OCB participated in intensive TA with the JD-VRTAC to create an employer database. Lastly, OCB has worked hard to increase its vendor capacity from 12 to more than 70. This means that OCB has dramatically increased its need for data systems, onboarding and training, accountability systems, and strategies to monitor vendor interactions with businesses.

ICI staff heard OCB leadership personnel talk about the principles of PE and the goals of PE as having a significant influence on infrastructure choices. We observed that, while these capacity improvements have been profound and critical, the technical and front-line activities of PE may have drifted. OCB leadership staff reported that the costs of job placement activities have quadrupled. This may be a sign of OCB's change in focus, its investment in PE, or the way CRPs are using PE activities and billing mechanisms. ICI has taken serious note of this last issue, particularly as it has major implications for small VR agencies that rely upon a large number of contractors for implementing employer services.

We suggest that OCB (and other VR agencies with heavy use of vendors) should invest in their data management and data tracking systems. We also suggest that OCB consider investing in a Training Director or training capacity with less reliance on BRCs. This is not to say that the BRCs are not competent or good trainers. It is to say that the opportunity cost of using a BRC who should be interacting with businesses to meet all of the training needs of a staff and vendor staff that have high turnover is significant.

# APPENDIX

**Table 5. Demographic Information for PE Cohort (n=71) as of 2017**

Demographic Information	Progressive Employment (N=71)	
Sex		
Female	39	54.9%
Male	32	45.1%
Age at Application		
Mean	35.73	
Median	33.54	
Race		
White	56	78.87%
Black	4	5.63%
Native American	1	1.41%
Asian	4	5.63%
Pacific Islander	6	8.45%
Ethnicity		
Hispanic	6	8.45%
Level of Education Attained at Application		
Elementary education (grades 1-8)	3	4.2%
Secondary education, no high school diploma (grades 9-12)	14	19.7%
Special education certificate of completion/diploma or in attendance	10	14.1%
High school graduate or equivalency certificate (GED)	13	18.3%
Post-secondary education, no degree or certificate	16	22.5%
Post-secondary academic degree & associate degree	4	5.6%
Bachelor's degree	11	15.5%
SSDI Status at Application		
Yes	25	35.2%
No	46	64.8%
SSI Status at Application		
Yes	28	39.4%
No	43	60.6%
Employment at application		
Employment Status		
Employment without supports in integrated setting	6	8.5%
Self-employment (except BEP)	2	2.8%
Homemaker	1	1.4%
Employment with supports in integrated setting	1	1.4%
Not employed: Student in secondary education	17	23.9%
Not employed: All other students	3	4.2%
Not employed: Other	28	39.4%
Competitive integrated employment	1	1.4%
Missing	12	16.9%
Weekly Earnings		
Mean	35.6	
Median	0	
Hours Worked in a Week		
Mean	2.6	
Median	0	

**Table 6. Select State Comparison of Costs for 2014–2017 by Closure Type**

State	Closure Type	Year	Total N	Total VR Funds Median	Total VR Funds Mean	Job Placement VR Funds Median	Job Placement VR Funds Mean
CONNECTICUT	Closed As Applicants	2014	1				
		2015	4	\$3,919.00	\$3,919.00		
		2016	5				
	Closed Before IPE	2014	13	\$2,757.00	\$2,820.00		
		2015	67	\$907.00	\$1,952.67		
		2016	69	\$1,030.00	\$1,722.20		
	Successful Closure	2014	114	\$1,920.00	\$6,341.13	\$617.00	\$676.75
		2015	120	\$1,556.00	\$8,913.14	\$851.00	\$839.00
		2016	112	\$1,508.00	\$7,401.92	\$804.00	\$886.22
	Unsuccessful Closure	2014	26	\$1,442.50	\$7,634.86		
		2015	55	\$1,829.00	\$8,882.94	\$830.00	\$725.20
		2016	50	\$3,585.00	\$9,929.49	\$401.00	\$376.20
IDAHO	Closed As Applicants	2014	39	\$163.00	\$162.38		
		2015	4				
		2016	5	\$59.00	\$49.67		
	Closed Before IPE	2014	18	\$125.00	\$228.29		
		2015	21	\$300.00	\$321.67		
		2016	20	\$149.00	\$274.43		
	Successful Closure	2014	96	\$2,990.00	\$4,691.22	\$597.50	\$674.63
		2015	94	\$2,887.00	\$4,393.54	\$823.00	\$877.80
		2016	89	\$3,115.50	\$4,295.03	\$322.00	\$954.40
	Unsuccessful Closure	2014	26	\$2,197.00	\$3,408.92		
		2015	46	\$1,947.00	\$3,611.08	\$81.00	\$81.00
		2016	26	\$1,933.00	\$3,064.46		
MAINE	Closed As Applicants	2014	18	\$96.00	\$96.00		
		2015	8				
		2016	6	\$30.00	\$106.33		
	Closed Before IPE	2014	33	\$567.00	\$1,161.67	\$311.50	\$311.50
		2015	16	\$137.50	\$137.50		
		2016	34	\$187.50	\$453.17	\$75.00	\$75.00
	Successful Closure	2014	116	\$2,142.50	\$4,270.60	\$1,103.00	\$1,485.27
		2015	91	\$963.00	\$3,257.00	\$1,252.50	\$1,945.17
		2016	109	\$893.00	\$2,423.43	\$1,909.50	\$1,928.20
	Unsuccessful Closure	2014	46	\$1,348.00	\$2,947.95	\$1,965.00	\$2,809.00
		2015	44	\$2,802.00	\$5,391.57	\$1,178.00	\$2,109.53
		2016	53	\$1,018.50	\$4,630.95	\$840.00	\$2,077.19
NEBRASKA	Closed As Applicants	2014	15				
		2015	3	\$73.00	\$73.00		
		2016	2				
	Closed Before IPE	2014	9				
		2015	5				
		2016	5				
	Successful Closure	2014	72	\$3,932.00	\$7,528.89	\$4,225.00	\$4,225.00
		2015	50	\$2,958.00	\$8,262.42	\$575.00	\$575.00
		2016	64	\$2,890.50	\$13,153.48	\$138.00	\$138.00
	Unsuccessful Closure	2014	56	\$763.00	\$2,263.89	\$750.00	\$750.00
		2015	50	\$1,825.00	\$5,928.37		
		2016	74	\$846.00	\$4,861.81		

State	Closure Type	Year	Total N	Total VR Funds Median	Total VR Funds Mean	Job Placement VR Funds Median	Job Placement VR Funds Mean
OREGON	Closed As Applicants	2014	31	\$373.00	\$373.43		
		2015	25	\$100.00	\$2,345.73		
		2016	28	\$341.50	\$376.40		
	Closed Before IPE	2014	28	\$378.00	\$1,446.14		
		2015	98	\$444.00	\$1,310.90		
		2016	69	\$408.00	\$658.48		
	Successful Closure	2014	79	\$5,598.00	\$8,148.99		
		2015	138	\$4,517.00	\$6,869.61	\$1,000.00	\$1,007.25
		2016	72	\$4,504.50	\$7,835.38	\$1,727.50	\$2,011.36
	Unsuccessful Closure	2014	21	\$2,712.50	\$5,973.65		
		2015	59	\$4,462.00	\$11,218.97	\$2,000.00	\$1,825.00
		2016	60	\$5,128.00	\$10,120.17	\$1,120.00	\$1,802.09
VERMONT	Closed As Applicants	2014	7	\$727.00	\$798.33		
		2015	9	\$15.00	\$55.50		
		2016	3				
	Closed Before IPE	2014	11	\$1,276.00	\$1,140.57		
		2015	4				
		2016	4	\$214.00	\$214.00		
	Successful Closure	2014	74	\$3,260.50	\$6,724.06		
		2015	90	\$2,521.50	\$5,736.76		
		2016	83	\$3,904.50	\$6,689.78	\$177.00	\$177.00
	Unsuccessful Closure	2014	25	\$3,672.00	\$5,607.84		
		2015	39	\$1,621.00	\$2,142.97		
		2016	23	\$3,644.00	\$6,088.16		
WASHINGTON	Closed As Applicants	2014	53	\$241.00	\$272.27		
		2015	40	\$240.50	\$509.88		
		2016	31	\$312.50	\$632.00		
	Closed Before IPE	2014	91	\$788.00	\$1,965.40		
		2015	92	\$688.50	\$1,293.45		
		2016	88	\$358.00	\$607.39		
	Successful Closure	2014	193	\$6,400.00	\$10,934.45	\$2,400.00	\$2,254.00
		2015	191	\$6,002.50	\$11,714.17	\$3,065.00	\$3,060.66
		2016	190	\$5,384.00	\$9,562.69	\$3,000.00	\$2,744.88
	Unsuccessful Closure	2014	138	\$5,348.00	\$8,499.59	\$840.00	\$1,248.45
		2015	153	\$6,822.00	\$9,990.71	\$840.00	\$1,185.10
		2016	164	\$4,404.00	\$6,795.42	\$942.00	\$1,452.55

Note: clients served by blind agencies were included in the FY2014 calculation, while clients diagnosed with blindness or visual impairment served in the states where there is a blind agency were included in FY2015 and FY2016 calculations.

Figure 2. Average median VR funds for state blind agencies (2014-2016)

