**The Vocational Rehabilitation Return on Investment Project:**

**Employment Research and Knowledge Translation**

*Presenters:*

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*Bob Schmidt - University of Richmond;*

*Joe Ashley - Ashley Consulting, LLC;*

*Kirsten Rowe - Virginia Department for Aging and Rehabilitative Services;*

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RICK SIZEMORE: Good afternoon and welcome to each one for joining us for today. We appreciate that. I'm Rick Sizemore, the former director of the Wilson Workforce and Rehabilitation Center down in Fishersville, Virginia. That is the program that has benefitted greatly from this VR-ROI project. We're excited to be here and participate in the session today. I'm also the executive producer of the VR workforce studio podcast, we podcast the sparks that ignites vocational rehabilitation through the inspiring stories of people, business, and, of course, professionals just like yourselves who are interested in vocational rehabilitation.

If you would like to subscribe to our podcast, please stop by and we’ll give you a free subscription. We’ll get you signed up and give you e-mail alerts every time there's a new and exciting episode.

We are recording today's session. There's a video being made. We're also making audio recording and hopefully there will be some comments and some segments from today's recording on an upcoming podcast episode. So, please, keep that in mind as you're making comments or asking questions.

So, time to get under way. I'm excited to be able to introduce today's panelists. We'll begin with Dr. Bob Schmidt, who is the principal investigator of the VR-ROI project from the University of Richmond. He's retired, and professor emeritus. I'm excited to be sitting beside my good friend, Bob.

To my right, Dr. Joe Ashley who just finished up a celebrated vocational rehabilitation career with the Virginia Department for Aging and Rehabilitative Services spanning more than three decades. We like to refer to him as the blind man with a vision. If you'd like to hear his story, we have an episode featuring Joe on our podcast. You can see that at [VRworkforcestudio.com](https://vrworkforcestudio.com/), another shameless plug, I apologize for that. But Joe has been around with this project really for the past several years, and now has moved out of his state VR career and in the second career as a private VR consultant. We're excited to have him with us today.

Also, from the Virginia Department for Aging and Rehabilitative Services, Dr. Kirsten Rowe, the project coordinator and the person who's been intimately involved with this project throughout the years. Also, Dr. Rob Froehlich down at the end of the table, who's a project director from the George Washington University and certainly a person who is affiliated and recognized as the key influencer and leader in this whole effort to understand the Voc Rehab Return on Investment project.

Okay. You do see our session objectives, if the clicker will work, and it does. You do see the session objectives up on the screen. In today's session, we hope to certainly provide a brief overview with the VR-ROI project, and describe the project's approach to engaging VR agencies and other stakeholders and describe some examples of the project's knowledge translation activities.

So, there are several people who have been involved with the project who couldn't be with us today. I’m going to ask Bob if he would give a quick overview of some of the key influencers that have been involved with the project. Bob?

BOB SCHMIDT: That sounds great. I'm going do it not quite in the order, well, the order that's here. I just wanted to say one thing first, our project is fairly complicated. There are a lot of people, a lot of moving parts. And the people who work day-to-day on the thing are divided to two components. One is the project management team. That’s all four of us around the project management team. We talk weekly to make sure that the railroad is on time and the trains are running on time, things of that sort. And the person who couldn't be here from that group is Dr. Maureen Maguire-Kuletz, who is our project liaison. She's at the George Washington University.

The other four, the other team is our research team. It's comprised of four PhD Economists. And we work on the technical aspects and also getting estimates and trying to interpret them for the VR community. I'm on that team as well, as are Dr. Chris Clapp, he's a senior research associate at the University of Chicago; Dr. John Pepper is a consultant, he’s at the University of Virginia. He's a Merrill S. Bankard professor of economics and the chair of the economics department. And Steven Stern, who is in the audience, is at Stonybrook University. I think that's it.

RICK SIZEMORE: Thank you so much. We want to move right into the crux of the presentation. Bob, I want to ask you to cover several areas. I know you like to roll through this. If would you give us a quick overview of the project, how it's organized, some discussion around how the economists and the VR professionals work together. And what's been the most important outcome of the collaboration, that's what we call the multi-question. But if you could give us a rundown overview, we'd appreciate it. So, Bob?

BOB SCHMIDT: I would call it a brief rest. Here it goes. The project we have, the DRRP, is actually the second grant that we received from NIDILRR. The first grant was essentially, it was kind of a proof of concept sort of an idea. So in that grant, we developed an estimation model that was both rigorous, estimable, hopefully produces interpretable and useful results for the VR community. That worked well in that we had three agencies who partnered with us. Three states and four agencies that partnered with us. Three of those states are still here with us. You'll hear about that in a second.

The second grant now is a five-year grant. The idea here is, so let's talk through some of these things, all right? So what we are trying to do is estimate and in this grant, we refined the ROI model for estimating ROI and service impacts. We'll talk about those in a second. We're partnering this time with nine agencies from seven different states. And I'm going to do them a little different order than they're listed up here.

Delaware, the first state, has two agencies. They have a general agency, and an agency for the blind, right? We're working with the general agency. Two other states up here have two agencies. They are North Carolina and Virginia. We're working with both agencies in both of those states.

The rest have combined agencies. Those agencies are Kentucky, Maryland, Oklahoma from the earlier one, we're still working with them a little bit, and Texas. So we're working with a variety of states from very small, as the state of Delaware and their agency, to the very large state of Texas. They're fairly heterogeneous in the way that the agencies are organized. They have a certain geographical footprint, but it doesn't extend much beyond the Mississippi. We don't have any western part in the country in this thing.

What we do is we collect data on applicant cohorts. The reason for that is, if you look at the applicant rather than the cohort, which had been a traditional way that these were looked at, what you're dealing with now are people who come in under a similar economic climate, a similar institutional climate, that means they have a similar sort of thought process as they work with their counselor and they work through the program in setting up a plan for employment, including the services and that thing. So that -- the behavioral aspects of it, they're operating under the same sort of constraints and that makes things useful.

So, what we're doing is, we have a group of clients -- we call a cohort, of applicants in 2000, another group of applicants in 2007, and then another one in 2012. Now, as the indication of a variety of things that affect that -- the 2012 cohort, right? That was the 2007 cohort, rather, these people came in 2007 when the economy was riding high. And just about the time they were closing out into and trying to get jobs, we have a financial crisis that led into the great recession. So that's a very different economic climate, one that we had to take the model and control for appropriately.

We also have -- sometimes we estimate what we call low incidence disabilities, that is, disabilities in which there are not many clients, one of those might be autism spectrum disorder. All of that might increase in the future. Another is folks with blindness or vision impairments.

Now, the way we approach this, we need pretty large samples. And those samples, if you look at a single year from a single agency, it’s probably too small to get reliable, rigorous results from it. That is what we do as you can see here, we ask for some agencies who are willing to give us six years of applicant cohort and then combine that for low incidences. And focusing on any year if the cohorts are large enough.

The other key thing is we use readily available administrative data, so that what we're trying to do here is make it as easy as possible for the agencies to cooperate with us and low cost as possible and we try to support them where necessary in collecting data. So most of this data that are collected for reports required by the federal government in particularly, the RSA911, RSA2, those things. They're already collecting those kinds of things, they’re generally available in some database management system. They're consistent across agencies, the definitions so it provides us with a rich data set. I think we're ready to move on. I can probably do it from here.

RICK SIZEMORE: I got you.

BOB SCHMIDT: Okay. Could I -- did I go too far? Can you go back one? Okay, so here we are. What we're attempting to do is generate an estimate of the impact of VR services on VR applicants in the long term. So, there are a lot of things on this that I should probably talk about. Number one, let's start with looking backwards a little bit. Traditionally, the way -- and the impact estimates or outcome studies, traditionally have been looked at with what we think of as a kind of generic client for a generic service. That is, for a long, long time, the way that these sorts of studies would look at is they would work with a group of people who either applied to or closed from VR in a specific period, time period.

And what they'll do is you'll look at people who received substantive services versus people who did not. So you'd have some sort of a comparison group. And when we said generic service, we're saying they received services, of any variety of types, we don't really know. We don't track that. They received substance services. That's a generic service. And the generic type? A lot of them did not really look at different disabilities. Different disabilities get a different array of service treatments, they have different plans, and they have potentially different outcomes in the labor market. But they’re kind of treated as a generic sort of a client.

Another thing that, for a long, long time would go on is the RSA911 collected information on the application regarding earnings. Did you work? If so, how much would you earn in a certain period of time? Collect again the closure, the two weeks before closure, if they're employed and information like that. And then they would kind of take that difference for people who receive substantive services, people who would not, and extrapolate and make conclusions on that. There's several things we changed. Most recently, with WIOA, it goes longer, it goes for about a year of closure. That's a little bit longer. But, still, not sure it's long enough.

So here's what we do. First of all, I kind of get to the second bullet point and then we'll come back, we separate this, we estimate annual rates of return and service impacts and we look at them for specific disability types. The ones we've been looking at in particular are folks with a mental illness, so that group of people, folks with a cognitive impairment, that could be a learning disability or an intellectual disability. And folks with physical disabilities, that could be internal or musculoskeletal. So we look at those three separately. And we look at those separately within an agency and across agencies. I'm not used to a microphone.

So, within agents and across agencies, there's a lot of estimation that goes on. In this first bullet point, jumping back there for a second, what it says is, we look at, instead of looking at the week of application, or two weeks, at closure or a year within, or after closure, we take a longer time span. What we do with that is we try to look at a period two to three years before application. That's sort of a baseline. And then you can compare post application, as a baseline; compare post service things. Compare to that. Say what's the difference? That's the baseline, two to three years before, but it's a longer period of time, right? And we try to look for at least five or more, maybe ten years of data afterwards.

Now, these data, when we asked for data and cooperation from an agency, these data are generally collected from whoever collects unemployment insurance information for the state. When we ask the agency to cooperate, we ask for them to collect and maybe to reach out for the UI partner in the state and collect that sort of information. And also to help kind of cooperate, we know that in some states, those agencies charged for that data. And we built the money in from the get-go, from the beginning to help to defray those expenses from the partner agencies.

The last thing is, instead of one generic service, we do what's called cracking the black box on VR services. We worked with agencies over time and identified between seven to nine types of services broadly that seemed to make sense, so one would be an assessment of diagnostic evaluation. Some training might be in there, some maintenance and that sort for folks who are blind or vision-impaired. You might also talk about orientation and mobility, assistive technology. So, service that make sense. When we do that, we get separate impacts by type of service, type of disability, and agency. You get a wide variety, you get a deep look into this. And there's also one more thing. If you want to get into a little more detail, we have a resource tab on our project, our web project, [VRROI.org](https://www.vrroi.org/). Next slide?

RICK SIZEMORE: Next slide. Okay.

BOB SCHMIDT: Now, what we did from the very beginning and one of the key takeaways that Rick asked about is, we've tried to have ongoing engagement with our partner agencies. That is, keep them engaged. We said we wanted to develop rigorous, interpretable, and useful information, and the only way it can do that is by working with our partner agencies as closely as you could. So we have an ongoing engagement. Let me tell you how this worked out. It says to develop, implement and refine the project and its intended projects. So when we worked for the partner agency, the first thing we do is make a trip, three, four, five of us, and maybe one or two on the phone make a trip to the agency. And the purpose of that is three or four-fold.

The first purpose of this is to kind of run through our approach, our model, and some example results that we found in the past. So people can kind of understand our approach and our mentality and then ask questions about how that works. That's the first thing we do. The second point is we'd like to learn more about the specific institutional nature of the agency. We want to learn more about the agency itself. Because to a certain extent, we have this broad approach to it, but we can tweak it, we can customize it for specific agencies for something that's a little different that could make a pretty big difference. So we want to learn more and more about specifics of that agency. A third reason for it is that one thing we know about VR is that it is very cooperative between the client, the participant, and the counselor, right? They have a mutual understanding, a mutual agreement about a plan for employment, a service regimen, and we want to know how that works. We, then, we asked them how does that work with this? That's important in our model. We take advantage of that specific feature in our model. It's one of the key things that make it work. We need to know how that works.

Now another thing it says is ensure the validity of the results. That's the first thing. We make a trip out. And the next step, of course, is working with the agency to collect the data. We put the data in, we get descriptive statistics, learn a little about it, maybe the three disability types, the types of services they received. And while we're doing that and some other things, while we're doing that, sometimes we see things that kind of raise a question we don't understand. This looks different from what we've seen in the past. So we wanted to see, do these pass the smell test? Do we have it right? Do we have any data problems? Big data problems? What explains some of these things?

What we'll then often do is have a conference call with the agencies and run through some things and say, is there anything here that seems odd to you that given your background, your knowledge, that we don't have right. If so, let's try to get that figured out or fixed or explain to flesh out some questions in our mind. The next is to run through our model, clean that up, get that organized and estimate the estimates. And then we might make another trip to the agency and run these by. And, again, it's another check, another does this stuff make sense? This result looks a little odd to us. Is there a reason why that might be? Are we missing something? What's going on here? So all of these are, again, that rigor part. Because are we getting it right? I think that should about do it.

RICK SIZEMORE: Thank you so much, Bob. Having gone through this process with this team over ten years, I'm now 58 years old, getting older, watch less television, but I'm still hooked on the History Channel where they renovate and restore an old car in like 30 minutes. Well, if you've ever done that, like my dad does, it takes several years and these guys can do it in 30 minutes. So you get an overview of lots of years of work and having sat through a lot of meetings and having conversations and dissect the data and reflect on it and begin to see these realizations, it's exciting to see the compacted time frame. But we're literally talking about years of work to get to this deeper understanding. So the work that you and this team has done really is phenomenal. I'd like to ask Kirsten Rowe, Dr. Kirsten Rowe, you want to go from the podium or stay seated?

KIRSTEN ROWE: I will come to the podium.

RICK SIZEMORE: She's going to make it to the podium. Dr. Rowe has been with this project for many years. She's a VR professional in her own right in so many different ways and has been an inspiration to me as a person who's worked in VR for several decades. And it's nice to welcome her. Kirsten, what was the significance of the collaboration between the voc rehab professionals and the research economists from your perspective having gone through this process?

KIRSTEN ROWE: It was several fold. Certainly as Bob alluded to, so, there's more than one grant. There was an initial three-year FIP as well as the current DRRP, which is in the fifth of what will be six years. We're going to continue to next year for sure. This project has been a true collaboration between VR and labor economics researchers since the very beginning. Our agency, Dr. Ashley and I, were involved as VR professionals in the Virginia agency in the development of the four grant applications that finally led to an award, and we were equal partners. We helped define the research questions. We helped determine what the objectives of the projects have been. We have been integrally involved in working with the research team and with folks in the other states to help this project make sense and help work through the challenges of acquiring the data, making use of the data and making sense of the data, so it's been a collaborative endeavor from the outset. Although Joe is now in a private consultant role, he came into this five-year DRRP as a co-principal investigator. That said a lot about the nature of the collaboration. Joe has been an equal partner with Bob in determining a variety of things about the direction of the project and the focus of it throughout its life, and has been intimately involved in lots of decisions about the project.

Bob alluded to the fact that one of the ways that this project has recognized the importance of including VR as an equal partner has been through the willingness of the University of Richmond and the team to make grant funds available to help support VR agencies' costs in participating in this project. And, for anyone with a VR agency in the audience who's ever participated in a research project, they're exciting, there's a lot to learn -- and they cost. They cost time, they cost effort. And in the case of acquiring the unemployment insurance program data, at least in Virginia, they cost money. Being part of the process of deciding how grant funds are going to be allocated and having the explicit recognition that sometimes you have a grant-funded project, a research project has to support some of those agency costs, it was a big deal for us. It, again, reinforced the idea that they were partners.

I think one of the kind of critical things about this project that has made it so useful to the VR agencies and to VR in general is, unlike many other research projects, and Virginia VR has been involve in a number over the years, this one is about VR itself. A number of other research projects we have been involved in and are involved in now are about layering something on top. A new promising intervention, a new promising practice and studying the impact of this new promising intervention or promising practice as compared with VR business as usual and VR business as usual ends up being the black box, the generic service. It's the new promising practice or intervention that's the focus of the research.

In contrast, the researchers on this project needed to understand VR. Their model depended on them understanding VR. They have worked really hard. They ask us really good questions all the time about how decisions are made, when policies change, what the processes are for making decisions about services. How order of selection works, I mean, they understand a lot of things about how VR works as a result of the work that they needed to do to make sure that their model reflects the reality of how VR works. And it really has needed to be a partnership where we have certain expertise, they have certain expertise and it's the combined expertise that makes it useful because it is about VR and how VR works and what the long-term impacts are.

We also, since the current DRRP, the current Disability and Rehabilitation Research Project grant also has a knowledge translation or dissemination component, one of the things we've been integrally involved in since the beginning is how do we take that research information and translate it to stuff that makes sense to VR folks, to VR administrators, to VR program managers, to the VR field staff, and even makes sense to our VR program participants and to our state rehabilitation counsels. The fact that we were involved in making decisions about how to operate this project meant that there was always attention to those kinds of questions and people with knowledge and background and expertise in VR to help to inform the decision making about that. This has been truly unique in my experience with VR in the sense that it has been an absolutely integral partnership throughout its life span.

RICK SIZEMORE: You've alluded to how we've engaged in these challenging conversations. There's a lot of discussion. We are tackling these challenging problems. As you've worked your way through this process, any a-ha! moments?

KIRSTEN ROWE: Well, yeah. One of our early activities in the project involved going to a CSAVR meeting to describe what the project was about, as a way of providing early information, this is before results were available from the project itself, but here's the project, here's the model, here's the approach. And one of the people in the room -- and I can't remember what state they were from, neither Joe nor I remember.

RICK SIZEMORE: It was one of the states with those great rehabilitation counselors and statisticians.

KIRSTEN ROWE: Yeah, one of the fabulous states.

RICK SIZEMORE: Those great places.

KIRSTEN ROWE: So we were sitting at a table having a discussion about this new project and the person representing state X said, wow, sounds like this kind of information could be really useful for the informed choice process. If you're able to get information about how this particular type of service, how postsecondary education has this incredibly positive impact for people with cognitive impairments, and that if you receive that kind of a service, then you're likely to have better stability and employment and better long-term earnings and you could clearly attribute that result to the impact of VR rather than other factors.

That's one of the big things about this model that makes it so strong is they do a really rigorous job of saying, yes, this impact is due to VR, well, isn't that useful information for program participants themselves as they're deciding what kinds of services they want, what career goals they have, what options might be available. If they know what kind of services are likely to have a better impact for them in the long run, isn't that going to be useful? We frankly never thought of it that way up to that point. But it has that potential. Because it is such a rich set of information. And is very refined in terms of being able to speak to different kinds of impacts for different kinds of people in different programs in different states. That was a big a-ha! for both Joe and me when we attended this and we’ve been continuing to think about and pay attention to that as this project has been involved.

RICK SIZEMORE: Thank you so much. Dr. Joe Ashley is going to join us at the podium. Joe is the king of the one-liner, one-liners like helping consumers find an edge and other great comments that he's come up with through the years. I have heard him say in this process that he likes to create stakeholder involvement early and often and I think he's credited with saying that. So, Joe, how has this been part of the project? And what is the significance of the stakeholder involvement as you like to say, early and often?

JOE ASHLEY: I want to say, Rick, to our friends that – well, this is bizarre. I have a phone call coming in.

RICK SIZEMORE: Ladies and gentlemen, please pause momentarily while Dr. Ashley answers his telephone.

JOE ASHLEY: I never get phone calls.

RICK SIZEMORE This must be important.

JOE ASHLEY: No, it must be terrible.

RICK SIZEMORE Are you good to go? We can take a pause, we can move forward if -

JOE ASHLEY: Where was I? Sorry, excuse me for that.

RICK SIZEMORE: Early and often, stakeholder involvement.

JOE ASHLEY: I reacted much better when I spilled the water on me.

RICK SIZEMORE: I like working with this guy. I really do.

JOE ASHLEY: I would say that I want to thank our friends from the Center on Knowledge Translation for Employment Research for inviting us to participate in the track you have here on the State of the Science. We do really appreciate the opportunity to be here and thank you for that invite.

I would say the early and often is how we built into the program the opportunity to have stakeholder involvement and by that, we mean by the people who, the agencies that participate with us on the model and other people who have stakes in the VR process, including staff. As Bob pointed out, we spent a lot of time talking to our participants and we'll talk a little about that as part of the model. We created opportunities for structured focus group engagement with various stakeholders, and we also have taken advantage of ad hoc opportunities as they came up. A key component to this project has been our advisory committee and the robustness of that committee which I'll also speak to here in just a second.

But it doesn’t get much earlier in terms of engagement than we got the grant in October and by October 30 or the first of November of that same year, we were invited to come to NIDLIRR at the request of the director of research and the RSA commissioner, to discuss this model project and the approach we were taking. So, we went up to DC and had an opportunity to talk with invited staff from those two groups and it was very instructive. Because we went through the model and we had some great requests for the model research, these questions. And they're all great questions.

But one of the things that, as Bob mentioned when he went through the process, is our model builds specifically on readily available administrative data. And we obviously hadn’t made that clear enough, because for none of the questions that we received, were there any readily available administrative data. There are a couple of things we learned from that meeting, one of those was we needed to think about how we presented the innovations that we saw in our model and be clearer with them. And the second was we learned some information that, if we could find some data, we would include those questions in what we were looking at.

We also included some focus groups where we had a professional facilitator come in, and we went to the CSAVR meeting in Bethesda and invited agency heads from other than our four model states in the FIP. We took advantage of the CSAVR opportunity so not only did we have other rehabilitation agencies, we had CSAVR involvement, we had the National Council for the Administrators for the Blind services, we had state rehabilitation council members with us in that discussion. And thanks to our colleagues at GW, we were able to get some Tate Center directors back in the day to participate with us. We asked them, here's the model. Is there a better way to explain it? What do we need to clarify so people can understand what it is we're proposing? We were not clear in getting the point across when we were talking to folks about the innovations. And they were very helpful in helping us figure out what we needed to put out in the information.

The other thing we learned in this process was how agency heads were thinking about using the information. They said we'd really like to have something concise that we could share with the policy makers to whom we report. That was critical to think of how to do that. Then our friends from the Tate Centers were thinking of how the information should be thought of when we were looking at taking it to the VR staff.

We followed it up with the meeting of the National Rehabilitation Association where we invited people to participate in another facilitated focus group and similar kinds of questions. We were trying to get down to people who were more direct service level or supervisors. We can see, does this model make sense to you. What do we need to clarify, and also, how would you use this information? And it was from that start and in the meeting that Kirsten so eloquently described a second ago, that we decided maybe there is something here that we need to be thinking about for helping counselors with client choice. It sort of expanded our thinking on this process. So we were building this opportunity for discussion for people having input into what we were doing.

Another piece that was critical in this process is our advisory committee. Every agency head of any of the model agencies participating with us is a member of the group. They often bring key staff that they believe need to participate with them in that discussion, to hear the discussions. We had an outside economist from Mathematica who participated so they had another economics perspective being discussed. We had CSAVR and NCSAB representation with us in that particular room. We also had state rehabilitation council representation and from Virginia, we had basically a community rehab program steering community that had a representative who would participate. And we had chief workforce advisor in Virginia participating because we wanted a broader WIOA perspective on the DRRP when we got down to that.

This group often saw data preliminarily and had discussions with the economists on what Bob and Kirsten were describing on the model, this is what we're observing, what does it mean to you all. They began to learn about the variability of VR services across states. That was key to them. The other thing we would say is this is what we're seeing, does this make sense to you? That came up a lot. And it was used to refine the model and trying to develop these instrumental variables so that we could make sure whatever the results we said were the result of the VR intervention and not other factors. That became sort of a mantra.

The other thing the advisory committee was very helpful with in, was that you had to get it to counselors and staff so if you have this information, they could use it for program improvement, use it for client choice, as we began to get a more refined model. I will say in our DRRP, we had heard this enough from the advisory committee before them, we approached the colleagues in GW, you're going to hear the work that they've been doing that's just stellar. And we are looking at is people who knew how to take evidence-based practice and put it into something that VR counselors, VR staff could use in their day-to-day work. Or better, at least understand how it impacts them and their consumers. So, we built that into the model. They came up with the ideas that you're going to hear about on how to implement that and it's always been something that we put in front of the advisory committee to get refinement. So that was huge.

Another thing you saw that we did, or Bob talked about, was going out to each state. We had several meetings with states. We were trying to point out to them that participating with us was in their enlightened self-interest, it was good for all, and create the buy-in, that was huge. We were going to ask them for data and ask them to do things, so they needed to understand that it was important to do and it was useful information. That created a really good back-and-forth.

We went out in the early days to some direct service providers and some supervisors as we were looking at the service mappings, the terms, and saying do these groupings make sense? Is this how you do business in your state? So that we can modify it by state. When we went to the blind service agencies, as Bob mentioned, we created additional categories for them in the services because it seemed to be where their service mapping took them. We've been flexible in this but it's huge to be able to understand how all of this fits together. So that back-and-forth that we had either through the advisory committee or direct discussions with people doing the work made the model more viable and create a better instrument.

RICK SIZEMORE: Joe, you talked at length about these stakeholder groups, how valuable they were, particularly the one at CSAVR. Anything you would like to say about how the information that you provided to the VR professionals helped address some of the frequently-asked questions?

JOE ASHLEY: I would say that getting the information from folks about ‘you need to clarify some of these things.’ And that process is still ongoing, we're still not quite as clear as we need to be on how we control for selection bias in the as compared to who question. We're still working on that but I think the whole process has led us to creating some things we are going to talk about in a bit, the elevator speech and some other practical implications of the information, you'll see that.

And one of the things I think was critical is when we went out to these places to help clarify, we did a lot of active listening and active learning. And that active learning process that resulted in action being taken by the economists made a huge difference in people's trust of us and that we were respecting their time. So we thought it was important for us to be able to show that we had listened and where we couldn't make a change, we explained why, and that kind of interaction we think is critical in this process of clarifying.

RICK SIZEMORE: Thank you so much, Joe. We appreciate that.

JOE ASHLEY: Thanks.

RICK SIZEMORE: Dr. Rob Froehlich, George Washington University, if you would make your way to the podium. Always nice to have you on hand to help us develop deeper insights to VR as you've done in so many of these settings. What do you see as some of the critical points and the importance of this knowledge transfer effort?

ROBERT FROEHLICH: Sure, thank you for the nice comments.

RICK SIZEMORE: You're welcome.

ROBERT FROEHLICH: So knowledge translation, we knew that this was going to be essential from the very beginning. This topic that we're dealing with, the content of the information, is extremely abstract and it's really not easy to explain. Would it surprise you if I let you in on a little secret that economists speak a different language than vocational rehabilitation?

RICK SIZEMORE: You're kidding me!

ROBERT FROEHLICH: Maybe even a different language than counseling education professionals. So, in terms of when we've used this word, a lot of times translation, we're talking about something that's written in an entirely different language. You could have the best book but it's written in another language and you don't read that language. It's not really of a lot of value to you. We didn't want to have this big abstraction with all of this work just sitting there. We wanted to make sure that there was some utility and there was going to be some sort of a way to get this the greatest amount of use possible.

Knowledge translation was an essential piece of this. I’m going to talk about some of the feedback mechanisms that we've developed. I really want to say knowledge translation is a focus here but it's good communication. It's the ability to do a lot of what we've heard back and forth of talking with different groups and saying what did you hear? What does that mean to you? What are your needs? That's been essential to our work throughout.

One of the big mechanisms that we created in order to try to translate some of the great results and information that my colleagues have created was to create what we call the VR-ROI learning community. The learning community is similar-role, like-roled individuals in all of the states that we work with. In many ways, they have access to the data elements, they're knowledgeable about that. But there's also a line of individuals that are closer to the direct service professionals and have access. We've been able to access their time -- they've been generous with us -- their talent and knowledge to help us figure there are multiple messages that have to be used and delivered relative to the results. Different groups are going to need different things. This learning community that meets several times a year gives us the opportunity to get greater insight and to what are those needs at the multiple different areas.

We needed to know what do staff know? What are they interested in? What is their understanding of this information? That was essential. It was important for us to think about how do we begin introducing this information to different levels of staff? You don't want to overwhelm people. You don't want them -- sometimes when folks are talking about information that has a lot of tables and charts and different ways to figure out the information, you're good for two minutes and then people glass over. We wanted to figure out, how do we get there. How do we get the messaging in so that that screen doesn't come down immediately? Again, our learning community was very helpful with respect to that. They helped us also figure out ways to describe what it is, and what it isn't. What it can be used for and what's inappropriate, or what would be not so good applications of the information?

That kind of led us on a necessary and important side road. A nice compliment looking at the ethical use of return on investment data. What do we do with that? How do you put context around that? So, again, between the advisory council that Joe described wonderfully and in detail and our learning community, we've been able to tailor the messaging and in appropriate ways and make sure we're using the materials in the right way. Our learning community helped bring in training professionals, knowledgeable VR professionals, data analysts, evaluation staff, to help and develop project-related training and technical assistance products as well. In addition, helped us to get to some of those constituents in more detail that Joe talked about, the state rehabilitation counselors, direct service staff, community rehabilitation providers as well.

RICK SIZEMORE: Thank you so much.

ROBERT FROEHLICH: Sure.

RICK SIZEMORE: We're down to about 25 minutes left in the presentation. And now one of the sort of the key points is that throughout this process, we realize there was a need for the elevator speech, and we have all heard about that. Can you describe in 20 seconds what the crux of the matter is? I'd like to ask Bob and Joe to talk about the elevator speech. We'll turn to Bob for the first portion of that.

BOB SCHMIDT: Thank you, Rick. I think we need a new slide, right?

RICK SIZEMORE: You got it.

BOB SCHMIDT: Wait a second. Is that the way it reads? It's not in paragraph form. Okay. It works. Okay. This is a bullet point. The other is a paragraph.

The elevator speech says this -- applied to a group of folks in the year 2002, Virginia DARS, Department for Aging and Rehabilitation Services. Essentially what happens is we get to the bottom line, go through all of this stuff, you can summarize the results for the legislature and other folks. For those VR applicants in 2000 receiving VR services, 80% enjoyed earnings gains that exceeded the cost of VR. For every 1,000 dollars spent by the Department for Aging and Rehab Services, for DARS, the average by which we mean the median consumer earned $7,100 more in ten years than would have been possible without VR services. And the top 10% earned $45,100 or more in the same period.

So, let me go through and point-by-point, explain a little bit more about that. So the first point, 80% of folks enjoyed earnings gains that exceeded the costs of VR. There are a couple things about this. One, when we first presented it to senior administrators, one person said, you know, I like that. If you had told me that 100% exceeded, I wouldn't have any trust in what you were doing, you’re rigging the books, cooking the books, rigging the numbers, I wouldn’t believe it. I believe this. So what it does say is it exceeded the costs. So it does not mean that the other 20% did not have any earnings gains, necessarily. They might have had earnings gains, but they weren't as large as the cost providing the services. That's one thing. That's an important thing to remember. Some people didn't have earnings gain compared to people who didn't receive the service. This is all by comparison. Secondly this, is over a ten-year period. We look and say, over ten years this, is what the gains would be, because all of the costs kind of happen around within a year or so or two. The gains will go on for a long time or forever. You could look over a ten-year period, 15, 20-year period, but you're extrapolating these things and that's what this is.

Then secondly, for every $1,000 spent by DARS, the average or median, half are below and half are above that, earn $7100 or more in ten years than would be possible. So it's a seven-to-one ratio. Seven-to-one earnings ratio, earnings costs. That's pretty strong, that's good. This is through a model that we believe is rigorous. We tested it in the academic economic literature, to demonstrate the literature in double blind review, pretty strong journals and we have published about five of those articles so far.

We're also now working in the VR field in publishing. One of which is we have a special issue coming out in the Journal of Rehabilitation Administration. That will be coming out hopefully this calendar year or next, that will be coming out and that has six or seven articles, the whole thing is dedicated to ROI, not VR-ROI, not just ours, but the whole concept. That's pretty high. And the last one, $45,100 or more for the top 10%, that's off of the charts, right? That's just huge.

AUDIENCE MEMBER: Do those numbers reflect employed or employed and 26?

RICK SIZEMORE: If you could repeat the question for our listening audience.

BOB SCHMIDT: I'll repeat the question. The question is, does this just look at people employed or just status 26es, the old status 26, right? So that when we first started this, that's one of the things, it's been a back-and-forth. Rob says you have to educate economists on how to talk. And I'm sort of starting to understand him now, but it's been an effort. (Laughter.) When we first looked at this, my colleagues and the economists never really looked much at administrative closure status.

What we're interested in, does the person receive services? So these are for people who receive services of a variety of types. They may be closed status at 26, 28, or 30. Or maybe there was and actually, as you well know, some people who were not accepted into the process or did not complete an IPE, some of those folks received some services as part of the assessment, but that might or might not have an impact for them in the marketplace as well, positive or negative. So it’s anybody who received services, without respect to how successfully they were closed.

RICK SIZEMORE: Joe, do you have additional comments on how that was developed and insights to the elevator speech?

JOE ASHLEY: I mentioned to you that the focus group we did at CSAVR and we continue to be asked by the advisory committee that was chaired by my boss at the time saying we need something that's simple, concise, and that I can talk to the secretary or the people to whom they reported or the legislators locally, and do it in a concise way. So we began working with the economists to come up with a way to say this. In the beginning, you needed be in about a 23-story building so the elevator took some time to get to the bottom because it was a little longer. Now we're down to three, four floors now, Bob. So you have to get it out quickly in a way, it's about getting invited back.

Bob mentioned that it was to a secretary of health and human resources in Virginia where I presented the information that he was just sharing with you. He said 80%, so not everybody did it. That's fine, it got us an audience back where he brought a number people in from the state, including the legislature for us to present the findings in more detail; it gave us two hours. It was a foot in the door way to say here's what VR is doing and he said I want to follow up on that. So that's the purpose that the folks in the advisory committee were looking for with what we now deem the elevator speech. That's how it came about. That's one of the ways we put things in to action from the requests we got from the people we were participating with.

RICK SIZEMORE: Joe, before you go, as Kirsten makes her way over to the podium, tell us a little bit about the PERT program. We're going to be talking about that. Tell folks what PERT is?

JOE ASHLEY: It's the Post-Secondary Education Rehabilitation Transition project. It was an OSERS-developed transition project that started in about '85, It's still ongoing. It looks at developing career assessment. It's about nine days now of career assessment, also independent living skills assessment and leisure skills assessment. It starts with people in the school systems, with the team from VR and the schools. Those folks go to the Wilson Workforce and Rehabilitation Center. They go through this, nine days, a consolidated report that goes back to the schools and the design is for it to flow back and forth with the schools and that the information is used, the career planning information is used. Then the students in that process are followed along to make sure that things are changed over time.

RICK SIZEMORE: One of your legacies is that program and certainly you're recognized for the startup and the maintenance of that program all of these years. I know as a director of Wilson Workforce, I have to say former since I retired in June, I know that the center benefitted a lot from the ROI project, presenting information that demonstrated the effectiveness of that PERT program. Kirsten, could you describe the efforts to develop the informational statements and how this became a joint project between the researchers and the PERT staff?

KIRSTEN ROWE: Sure. First, I'm going to describe what those results actually were. So with this Postsecondary Education Rehabilitation Transition Program, the strength and flexibility of this project's approach to estimating the impacts of VR and of related programs on long-term employment and earnings, enabled the researchers to look at the impact of the PERT program. And what they found was that, participation in PERT alone increased participants' likelihood of finding and keeping a job by 12%. And then if students, it’s a program for students, if students stayed in school at least one more year, the odds of them getting and keeping a job increased by an additional 38%. And then after finding a job, participating in PERT on average doubled people's earnings over time.

As you can imagine, this is really powerful information for the program staff and for the participants in the program, the potential participants, for the schools that are equal partners in the PERT program. The process of getting to this was another example of the partnership between the researchers and the VR collaborators on this project. Because it was really important to the staff of the PERT program for the results that, once they heard about these results, they were like, oh my goodness, we have to share this information with our stakeholders, with potential participants. People need to understand that this is a program that is a program that can really make a difference. It's important they didn't overstate the results of the research. The researchers were understandably concerned about making sure that the way that program staff were describing the results not only supported by the findings, but also didn't overinterpret the findings.

So, several members of the research team, who at that point was based in Charlottesville or Richmond, got in the car, drove over to the Wilson Center, across the Blue Ridge mountains, and spent the good part of ta day hammering out what would make sense to say that could be said in a way that the average stakeholder, participant, parent, teacher could make sense out of. And that to me is a really sort of classic example of really effective knowledge translation that takes collaboration and takes being willing to work together to get to usable information for particular stakeholder groups.

RICK SIZEMORE: Rob, you have anything to say in terms of this being an ethical use of data? I set it up for you.

ROBERT FROEHLICH: You set it up nicely for me. Absolutely, that's the whole start to finish description of looking at, what is it? What can you use it for? What should you not use it for? Along those lines, we really kind of worked on having a few quick messages about that whole what it's not used. It's not used to screen people out or change the whole concept of vocational rehabilitation from individualized. It's not to say you have this characteristic. And there wasn't such a great return on this. You can never do that. That's not the intent at all. So, it's a nice link-in with that particular topic.

RICK SIZEMORE: Thank you so much. I'm not a data person. I value data. I use data. But I'm the token marketer/program person that gets invited to a place like this because I enjoy moderating panels. But I can say that when we had the PERT staff engaged in that dialogue, we're talking about a group that works with dormitory and residential students, that does life skills programming, vocational evaluation, after evening hours activities, when they heard those statements, they came alive. Because it wasn't an academic activity that was very heady and that a talking head is going to come in and share with you. They began to see it, they began to quote those statements to parents.

When parents would drop their son or daughter off, they could make some sense of what's going on here and share an anecdote or a data point that really, many times, helped us get mom to the car. Because when they dropped their kids off sometimes, very -- separation anxiety. Who's dropped their kids off at college before? Any mom done that? It's a long way back to the car, isn't it? So that was just a memory of how this really affected our operation. We're going to wrap things up here shortly. We have about nine minutes. Bob, do you have closing comments? I'll share the mic.

BOB SCHMIDT: Sure. I'll say that I'm thankful and appreciative to be part of this project. It's been very rewarding to us. The interaction between the partner agencies and all groups, and the economists, has been very exciting and we've learned a lot. It’s interesting, but when you step out of your discipline, your area of expertise, when you talk to other people, you learn a lot. One thing you learn is that you use jargon, that's one thing you learn. And then you also learn maybe how to express the same ideas without using some jargon. And I know in teaching for decades that, sometimes the questions that students ask is like, now, where did that come from? You know? That kind of thing and there are a couple of ways that you can react. One way you can say is that's a stupid question, I'm moving on, which is not necessarily appropriate.

The second way is to say, you know, there's something here that maybe I don't understand this as well as I thought I did. You go back a little bit more. You think about it from a different perspective. You learn more about taking a different look at it, that's what's been happening with our economists and my colleagues and that sort of thing. So, it's been great. We loved it.

RICK SIZEMORE: Thank you so much. Joe, any closing comments? Come over to the podium if you want to.

JOE ASHLEY: I would just say I greatly appreciated working with the economists. Their drive to learn how VR works has been critical to the success of us being able to capture information on VR outcomes and their commitment to making sure that it's as accurate as possible has been -- in my case, I'll use the words "fun to watch," because it's been serious and quite the experience.

RICK SIZEMORE: Thank you so much, Rob? Kirsten? Closing comments? Kirsten is going to pass. Rob is coming over.

ROBERT FROELICH: Just one thing too, we mentioned when we were talking about the learning community and how it's been useful and effective in developing some things. I neglected to mention there are a few resources on our website at VRROI.org including a series of modules that were developed in collaboration with the learning community and with a lot of feedback and refinement from the community, and those are really basic information on the concept of return on investment. Some information about our project, but just basic information that may be helpful to you or some of your colleagues or anybody in your circle of influence. So, [VRROI.ORG](https://www.vrroi.org/). Feel free to go, take a look at those, and hope they're helpful to some folks.

RICK SIZEMORE: We're going to finish up here. We have a couple more things we want to do. Are there -- we have time for one question, if anyone has a question? Yes, sir?

AUDIENCE MEMBER: Yeah, with ROI studies, I find that, like, where do you start and stop the scope of value add-in, for example you can make the argument that, you know, these people that are getting their return on investment through the VR program that, they’re now in better health, right? Unless it’s taxing on the healthcare system. You can make the argument that their kids are going to be better -

RICK SIZEMORE: Where do they start and stop, yeah.

AUDIENCE MEMBER: And so on. You can make those same arguments on the other sides. I'm curious, where do you start and stop these value adds or costs realized?

RICK SIZEMORE: Let me do my best to capture that eloquent question. Where do you begin and end in an ROI study and what do you attribute it to? I'll turn that over to you.

BOB SCHMIDT: As we mentioned several times, we're only able to use administratively available data. So that means we're only able to use employment and earnings data, that's it. We understand. We realize there's many more benefits to VR services in the program than simply that. There is -- you mentioned several of them, but one thing, they're just independent living skills. Just the joy of life, just the satisfaction from doing it. Other people have mentioned, if it might or might not reduce criminal jail rate sort of thing, all these sorts of things. There are a lot of things. So what you can look at these things are like a baseline minimum, and that there are some other additional benefits above and beyond that.

RICK SIZEMORE: And we did have one of the researchers involved pass away. I’ll ask you if you would just mention David Dean.

BOB SCHMIDT: A colleague of ours, especially mine, David Dean, who you might or might not know, worked in this area of economics disabilities, he called it, for 40 years since his grad school days at Rutgers with someone who is kind of a pioneer in the field by the name of Monroe Berkowitz at Rutgers. He passed away very young in 2013. He worked with my colleagues at Virginia DARS for 25 years. He got me interested in the economics disability. I never worked in this area before that. He's worth a mention. He died too young.

RICK SIZEMORE: He leaves a lasting legacy because of the work he did. As we finish up, I have about a two-minute piece we're going to play. Feel free to exit, but please don't. This is a two-minute introduction to the podcast featuring familiar voices while you fill out your evaluations. Please stop by and give us any questions. To my audio friends in the back, I did plug up the earphone cable and hopefully this will come through. But this is just a little introduction to our podcast:

>>> (ticking clock in background) Give us a few minutes and we'll take you on a journey of a lifetime.

>> It startled me, so I went to run. I tripped on one of the strings and lost my balance and fell 25 feet off the loft head first. I landed on concrete and boards.

>> A disability can strike like lightning and in the twinkling of an eye change your life forever. In the United States alone, there are over 60 million people with a disability, so chances are, you know, work with, or love someone with a disability.

>> A disability can alter your life even if you're pursuing your most deeply held passions.

>> I had a couple of things that day telling me not to race. Every medical professional who's seen the video, they asked the same three questions, one, how am I alive, two, how did I not end up with a cervical-level injury, and, three, how did I not end up with a severe brain injury?

>> People with disabilities have proven time and time again to be some of the most resilient, talented, and capable people on earth and employers are beginning to recognize the energy, passion, and dedication that individuals with disabilities are bringing in to the work place.

>> Rod has been with us for a long time, that's the return on investment. That's the simple business part of it. Beyond that, he teaches, he trains, he's a subject matter expert. To be able to access that eight, nine, ten hours a day is in our best interest.

>> That's why we opened up the VR Workforce Studio, a place where we can all celebrate the courageous stories of vocational rehabilitation.

>> Stories from those on the journey.

>> I broke down. Because, you know, that was the day that I knew I was going to get back up and get walking.

>> Stories about the champions of business and industry that hire individuals with disabilities.

>> The company I work for, very professional, very nice. The company is like a big family.

>> Reflections from the professionals that have dedicated their lives and careers to helping individuals with disabilities go to work.

>> Working with the students closely to see them come in and think that oh, I don't know if I can do this. And provide support for them to where they are empowered and achieving their goals.

>> Now you can be part of this exciting podcast revolution. Welcome to the community of people who want to champion the causes of disability employment.

>> Diving down into your own personal hells and then coming out of that hell with a smile on your face but with bumps and bruises in the process and you can walk away smiling and feeling proud of those bruises.

>> Every time my son drives off to work, I just feel so good about what it is that you nice folks prepared him for.

>> Getting people back to life and back to work.

>> These powerful stories, as told by people on the journey are just a click away on your computer, cell phone, or mobile device.

>>> I think what you’re doing is kind of unique. We're in a period where people can get a lot of information from a lot of different sources. I’m just trying to make people aware of that, so I thank you for what you're doing.

>> Join us for a new and exciting episode of VR Workforce Studio podcast every month at [VRworkforcestudio.com](https://vrworkforcestudio.com/) or subscribe at Stitcher Radio or in iTunes. (end)

RICK SIZEMORE: Thank you so much for coming out this afternoon. Have a great afternoon.