



## Vocational Rehabilitation Working with Job-Driven Data: From Business Engagement to Employment

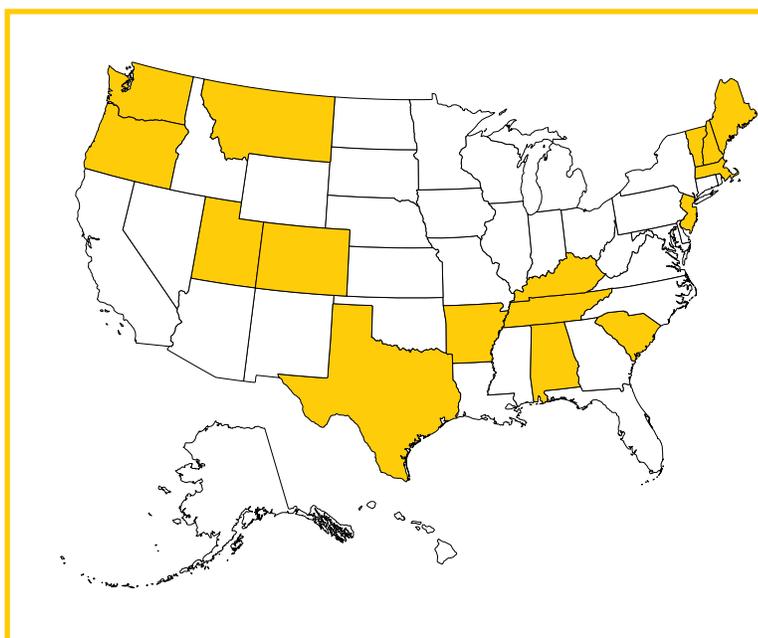
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This brief highlights state practices and lessons learned from the Job-Driven Vocational Rehabilitation Technical Assistance Center's Business Engagement Data Community of Practice.

### Background

The Workforce and Innovation Opportunity Act (WIOA) charged state vocational rehabilitation (VR) agencies and workforce systems to directly engage employers to make employment and training initiatives more job-driven<sup>1</sup>, and to employ practices and mechanisms to improve overall business engagement accountability. In response, the Job-Driven Vocational Rehabilitation Technical Assistance Center (JD-VRTAC)<sup>2</sup> formed the Business Engagement Data Community of Practice (CoP). The CoP gives states a forum to share solutions and strategies aimed at increasing VR agency capacity to collect and use business engagement data that ultimately leads to increased employment outcomes for individuals with disabilities.

The CoP was facilitated by content experts and had representation from the following state VR agencies:



Alabama Department of Rehabilitation Services  
Arkansas Rehabilitation Services  
Colorado Division of Vocational Rehabilitation  
Kentucky Office of Vocational Rehabilitation  
Maine Division of Vocational Rehabilitation  
Massachusetts Commission for the Blind  
Montana Vocational Rehabilitation  
New Hampshire Rehabilitation Services  
New Jersey Commission for the Blind & Visually Impaired  
Oregon Commission for the Blind  
South Carolina Vocational Rehabilitation Department  
Tennessee Vocational Rehabilitation Services  
Texas Division of Vocational Rehabilitation  
Utah State Office of Rehabilitation  
Vermont Division of Vocational Rehabilitation  
Washington Division of Vocational Services

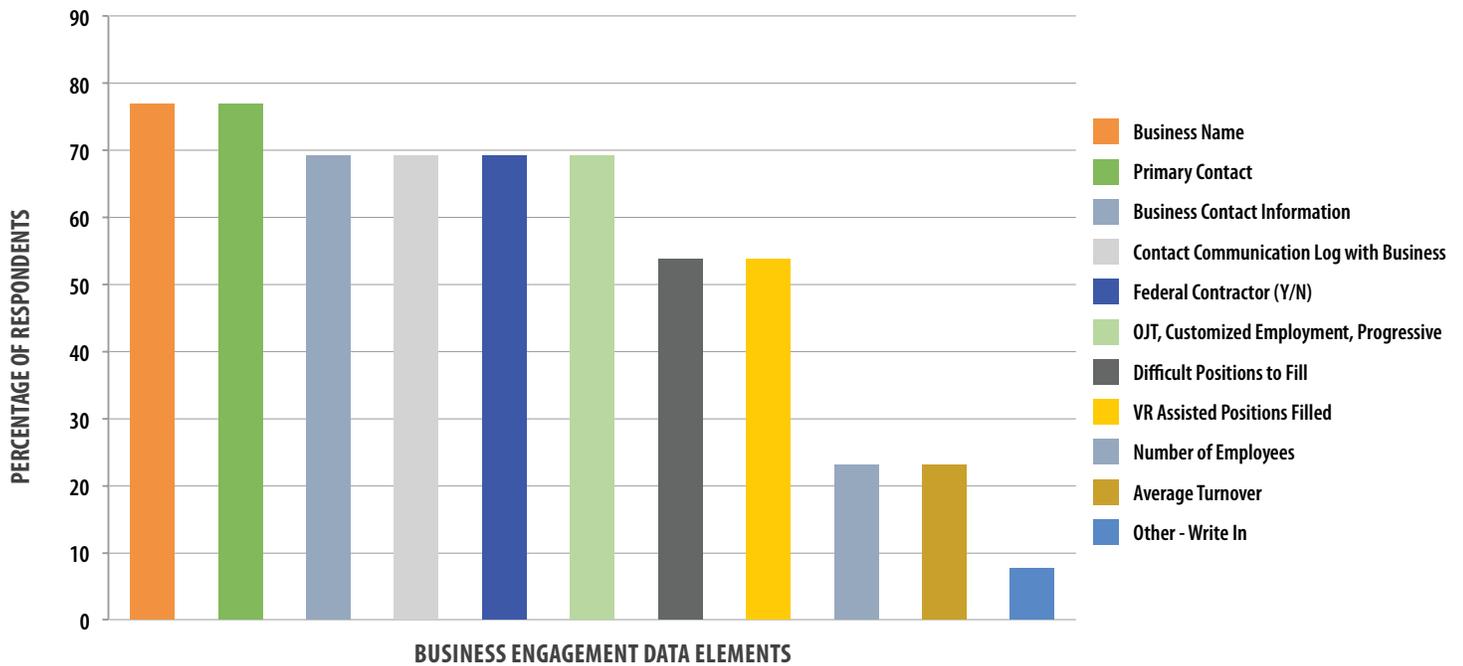
### Key Data Elements for Business Engagement

#### **Business Engagement Toolkit Tip** ([www.explorevr.org/toolkits/business-engagement](http://www.explorevr.org/toolkits/business-engagement))

Business engagement is interaction between employers, vocational rehabilitation (VR), and other workforce development and education organizations that results in measurable improvement in desired outcomes for both parties. Engaging businesses is a key component in improving and increasing employment outcomes for people with disabilities.

Though the requirement for workforce systems to improve business engagement efforts has been implemented through the enactment of WIOA, there are still some questions as to which data elements are most useful in helping agencies maintain and improve their business engagement efforts. In response, the CoP facilitators surveyed participants to identify some common data elements that the group felt were key to initiating, improving, or advancing business engagement.

Figure 1: What are some essential and desired business engagement data elements?



Among the most essential and desired business engagement elements reported by the group were business name, contact information, primary contact, and federal contractor status. In addition, respondents noted accessibility to public transportation, drug screenings, background checks, computer software accessibility, and benefits as key to being informed about engaging with businesses.

## Strategies for Data Collection

### Business Engagement Toolkit Tip

([www.explorevr.org/toolkits/business-engagement/information-management](http://www.explorevr.org/toolkits/business-engagement/information-management))

The Business Tracking System is an excellent tool for maintaining and growing a successful partnership with potential or current employers. A well-maintained and upgraded system will serve as a valuable marketing tool for future services and client information. Employers have stated that maintaining accurate, timely, and efficient contact is essential to a lasting relationship.

There are a number of data elements that agencies have prioritized in their business engagement efforts. However, the strategies and initiatives that agency personnel have implemented to organize and collect business engagement data often vary widely across agency units, teams, and districts.

While some state agencies have used modules in their existing case management systems to develop business accounts, others have explored and invested in customer relationship management tools as a way to track business-specific data, separate from VR client case management systems. Further, some states have explored the possibility of connecting case and customer relationship management systems, as the linking of information about job-ready clients becomes critical in placing and supporting them in employment opportunities, while efficiently responding to needs of businesses.

Below are some examples that were featured during CoP discussions highlighting case and customer relationship management systems, agency-developed systems and collaborative tools, and business satisfaction surveys.

## Case and Customer Relationship Management Systems

### CASE MANAGEMENT SYSTEM EXAMPLE: AWARE

Some state VR agencies in the CoP reported that they use AWARE as their case management system, and use an employer module within that database to track information on businesses and job leads. The AWARE employer module is an optional feature of the database, and can be updated directly by agency personnel.

### CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM EXAMPLE: SALESFORCE

Nationally, several state VR agencies have invested in Salesforce, a commercial customer relationship management system that provides a technological interface for developing, interpreting, and maintaining business accounts. Providing real-time ways to monitor data and communicate job leads, Salesforce offers a technological solution to collaborating within and across teams.

The system is highly customizable, and each agency using it has tailored it to meet the needs of their agencies. Visit [www.explorevr.org/toolkits/business-engagement/information-management](http://www.explorevr.org/toolkits/business-engagement/information-management) to view live demonstrations of how the Vermont Division of Vocational Rehabilitation and the Texas Workforce Commission customized the Salesforce software.

## Agency-Developed Systems & Collaborative Tools

### AGENCY-DEVELOPED SYSTEM EXAMPLE: SOUTH CAROLINA DVR

The South Carolina Department of Vocational Rehabilitation developed Career Connect, their own business accounts system, using their in-house informational technology staff. The Career Connect system links together communication about job leads and qualified candidates for business relations specialists and counselors. Once job orders are entered, the system uses the data to identify clients in their talent pool who are potential matches for businesses and companies.

View the following presentation to learn more about the development, features, and functionality of South Carolina VR's Career Connect system:

[https://www.dropbox.com/s/yqt5v6prpytqtd/SCVRD\\_CareerConnectOverview.pdf?dl=0](https://www.dropbox.com/s/yqt5v6prpytqtd/SCVRD_CareerConnectOverview.pdf?dl=0)

### COLLABORATIVE TOOL EXAMPLE: ONLINE SPREADSHEET

Kevin Red, Information Systems Manager at the University of Arkansas and a member of the Community of Practice, developed and shared an Excel spreadsheet template that can be stored in Google Docs as a tool to collaboratively edit and track business data. As many of the CoP participants were looking at ways to show that they are currently doing business engagement activities (see figure 2 below) using a low- or no-cost tool, several agencies adapted this spreadsheet to help manage the information they intended to collect. Users commented that they found it helpful as a beginning effort to develop a more robust system for collecting and analyzing business engagement data.

*View Kevin Red's presentation:*

[www.dropbox.com/s/ccgmjdw4iu9w5e/Business%20Engagement%20Data%20Tracking.pptx?dl=0](http://www.dropbox.com/s/ccgmjdw4iu9w5e/Business%20Engagement%20Data%20Tracking.pptx?dl=0)

*Download the original template*

[www.dropbox.com/s/paqqlrqcr3odqwx/BE%20Tracking.xlsx?dl=0](http://www.dropbox.com/s/paqqlrqcr3odqwx/BE%20Tracking.xlsx?dl=0)

Figure 2: Which Statement Do You Agree With Most?

| Value                                                                 | Percent |
|-----------------------------------------------------------------------|---------|
| We want data elements to show that we are doing business engagement.  | 61.5%   |
| We want data elements to show how we can improve business engagement. | 38.5%   |

## Business Satisfaction Surveys

Though the majority of participants were looking for ways to show that they are currently doing business engagement, some states administered business satisfaction surveys to qualitatively capture data showing how they can improve their business engagement efforts. Business satisfaction surveys are a way to engage directly with business representatives to capture feedback on how to improve existing relationships, or how to initiate new relationships with prospective business partners. Due to the fast-paced environment of business professionals, the CoP discussed a variety of formats for conducting business satisfaction surveys, including online and telephone methods.

### ONLINE BUSINESS SATISFACTION SURVEY EXAMPLE: UTAH VR

Utah VR, in collaboration with Work Ability Utah, administered an online satisfaction survey to 357 individuals representing 195 organizations who were a part of Utah’s Persons with Disabilities Network (PWDNET). The survey was intended to gauge how well the public workforce system responded to business needs. The questions targeted business engagement activities such as job postings, workshops, information sessions, employment practices, programming, and staffing.

**Read the full evaluation report:**

[www.dropbox.com/s/akuaak35mi4hx6b/Pwdnet%20Survey%20Report%20FINAL.pdf?dl=0](http://www.dropbox.com/s/akuaak35mi4hx6b/Pwdnet%20Survey%20Report%20FINAL.pdf?dl=0)

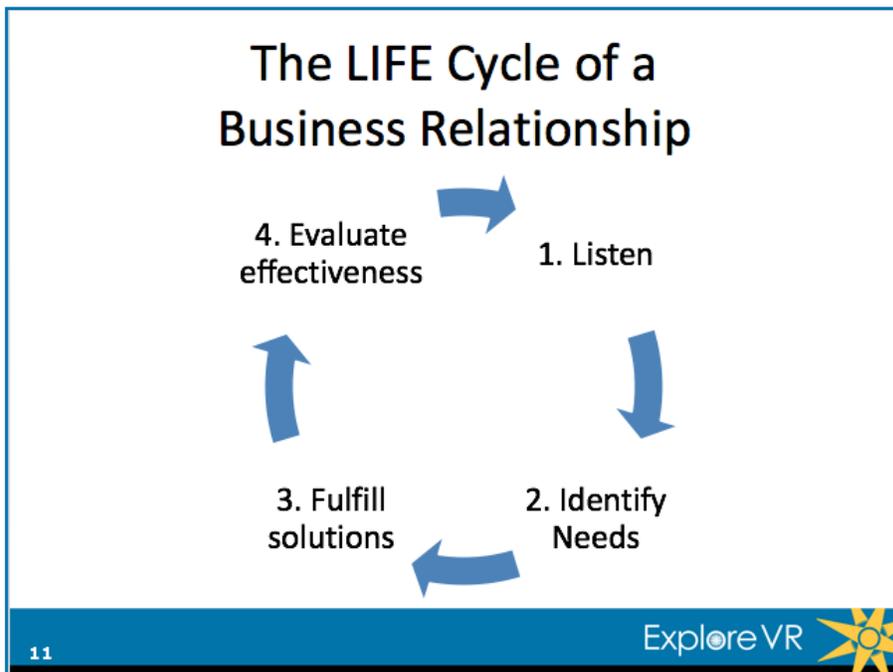
### TELEPHONE INTERVIEW BUSINESS SATISFACTION SURVEY EXAMPLE: VERMONT DVR

The Vermont Division of Vocational Rehabilitation (Vermont DVR) partnered with an independent research firm, Market Decisions, to conduct telephone interviews to determine employer satisfaction with Vermont DVR services. The survey also gauged awareness of VR and VR services among employers in Vermont.

The survey questions were developed in collaboration with the staff of Vermont DVR, and included questions specific to awareness of and familiarity with the Division and the Vermont Association of Business Industry and Rehabilitation (VABIR); communications with and use of services provided by the Division and VABIR; satisfaction with the services provided by the Division and VABIR; interest in receiving services provided by the Division and VABIR; company hiring process and prior experiences with employees with disabilities; and communications.

**Access a template of survey questions:**

<https://www.dropbox.com/s/1mfwhafvqh23j5a/VT%20DVR%20Employer%20Survey%20DRAFT.doc?dl=0>



## Lessons Learned

1. States vary in the degree to which they have been active in business engagement and collecting data on those activities. Some have been active and successful for many years, establishing their efforts well before WIOA mandates. Others have been active more recently, but have a good start to meet new expectations. Many states are quite recently establishing business engagement processes for engagement and data gathering.
2. States are in earnest to obtain data to demonstrate business engagement activities and success as required under WIOA. States are still finding their way in terms of what data will be gathered, as well as how and where it will be collected.
3. With uncertainty on what business engagement data elements states will be monitored, to assure WIOA compliance (as of the writing of this brief), VR agencies are establishing generally accepted criteria across state lines, with slight state-to-state variations to document meaningful business engagement for people with disabilities.
4. In addition to those business engagement data elements anticipated to be needed to meet federal expectations, states also identified elements they wanted to collect to reflect their particular focus and priorities.
5. States are primarily focused on making sure they have a mechanism and process for business engagement data gathering to demonstrate they are doing business engagement as required. The current focus is not as strong on how that data can help them improve business engagement. However, states are very clear that their next step is to use gathered data for business engagement program improvement.
6. The Business Engagement Data Elements CoP appears to have been a considerable resource to states, regardless of how long states have been active in business engagement. They have requested that the CoP continue on in a "phase II" to address business engagement program improvement through data elements analysis.
7. VR agencies have questions about integrating the business engagement data they gather with those of other partners of the workforce system, particularly given the current lack of integrated systems in many states. This integration is dependent upon agreement on the elements of data collected.
8. Some states are still reviewing internal systems to ensure that business engagement data is distributed in a timely and accurate manner to all members of the VR team to ensure placements that benefit VR's dual customers.

### Areas for Further Exploration:

- Are VR agencies embedding business engagement activities as a part of staff performance appraisals? Are there annual performance measures for business engagement?
- What are the business engagement data requirements under WIOA? Are there differences in collecting data on federal reporting requirements versus interpreting data to improve services?
- Should agencies report on employer services/supports separately?
- How can agencies capture qualitative versus quantitative data?
- What are some options for integrating and sharing business engagement data with the entire workforce system? How should VR agencies compare and contrast rehab and workforce data needs for WIOA, and determine how much to share with partners?
- Should VR agencies consider joint agency outreach to businesses? How can they set clear expectations at the outset regarding agency distinctions and customer service?
- What business engagement data tracking systems exist? Do certain systems better meet the requirements of the new law? What level of technological skills are needed to maintain systems?

## ENDNOTES

- <sup>1</sup> [https://obamawhitehouse.archives.gov/sites/default/files/skills\\_report\\_072014\\_2.pdf](https://obamawhitehouse.archives.gov/sites/default/files/skills_report_072014_2.pdf)
- <sup>2</sup> The JD-VRTAC conducts research, training, and technical assistance activities that focus on improving the VR system's service to businesses as a customer, while also meeting the needs of people with disabilities who are seeking employment.

# Explore VR

Informing Research, Policy, and Practice



Review VR is a publication of ExploreVR, the data hub for a group of vocational rehabilitation research projects at the Institute for Community Inclusion (ICI) at the University of Massachusetts Boston.

ExploreVR is funded in part by the National Institute on Disability and Rehabilitation Research (NIDRR) and the Rehabilitation Services Administration (RSA) of the US Department of Education, grant #H133B070001 and grant #H133B120002.

The JD-VRTAC is a national center housed at the ICI, and is an ExploreVR project. The center and its briefs are funded by the RSA under grant #H264A140002.

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