

Job Retention and Career Advancement: VR Agencies Serving Consumers  
with Blindness or Low Vision and WIOA

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**Abstract**

A national survey of state vocational rehabilitation agencies serving consumers who are blind or have low vision investigated agency policies and procedures regarding job retention and career advancement and potential changes associated with Workforce Innovation and Opportunity Act (WIOA) legislation concerning those services. WIOA regulations addressing job retention and career advancement appear consistent with existing policies in some states but present challenges for others. Agency representatives were more likely to report policy changes were made or were being considered regarding career advancement than for job retention. Less than one-third of agency representatives expressed concern about the financial impact of providing career advancement services.

### **Job Retention and Career Advancement: VR Agencies Serving Consumers with Blindness or Low Vision and WIOA**

State vocational rehabilitation (VR) programs are charged with maximizing the “employment, independence, and integration” of persons with disabilities into their communities and into the competitive labor market (U.S. Department of Education, 2017a). The Workforce Innovation and Opportunity Act (WIOA), signed in 2014, amended the Rehabilitation Act of 1973, and its regulations pertaining to VR programs. These amendments included provisions to promote job retention and career advancement for persons eligible for VR services. As a part of their overall effort of program improvement, as well as to respond to WIOA, the Council of State Administrators of Vocational Rehabilitation (CSAVR) conducted listening sessions with their stakeholders and partners that revealed a concern with inconsistencies, both within and among states, in VR policies and processes (Martin, 2017). In an attempt to learn more about potential programmatic inconsistencies and how national legislation might influence state policies and processes, this study examined how state VR agencies serving persons who are blind or have low vision are responding to WIOA in regard to job retention and career advancement services.

#### **WIOA and Vocational Rehabilitation**

Although WIOA became law in July 2014, the final regulations associated with it were not issued in the Federal Register until August 2016 (81 FR 55630, 2016), and went into effect 60 days later. WIOA changes strengthened relationships between VR and other workforce systems, and emphasized “high quality” competitive employment in integrated settings for persons with disabilities (81 FR 55630, 2016). For example, competitive employment must include the same potential for a person with a disability to advance in employment as an employee without a disability. While recognizing that some VR agencies have already done so, WIOA extended VR services to eligible persons seeking to “advance in” employment, including

the provision of postsecondary graduate education to meet vocational goals. This “advancement” may take place in the person’s current job or new employment. Consequently, employment status cannot be used to deem a person ineligible for VR services, and eligible applicants may receive VR services if those services appear likely to increase their upward job mobility or economic self-sufficiency (81 FR 55630, 2016).

With regard to job retention, WIOA regulations state that VR eligible persons at “imminent risk of losing their jobs” will be prioritized for service delivery. Further, those at risk of losing their jobs may be exempt from an order of selection policy (81 FR 55630, 2016) that limits the number of persons served per year based on the severity of their disability (Hager, 2004). VR programs are also charged with documenting that services are being provided to employers to assist them in retaining workers with disabilities (U.S. Department of Education, 2017b).

### **Job Retention and Career Advancement**

Although persons with disabilities are more likely to apply for VR services after losing employment (Allaire, Niu, & LaValley, 2005), VR recipients who are blind or have low vision are more likely to be employed at application (McDonnall, 2017). However, the Rehabilitation Services Administration (RSA-911) case service data makes it difficult to discern whether employed applicants sought services for job retention or for career advancement.

In fiscal year 2015, of VR applicants with blindness or low vision, almost one-third (32.2%) were competitively employed; most (82.7%) employed applicants retained or advanced in employment; and employed applicants were more likely to be White, older, more highly educated, less likely to receive SSI or SSDI, and less likely to have a non-cognitive disability (Authors, in press-a). Further, employed applicants received a different pattern of VR services

that included on-the-job support services (short-term and supported employment), rehabilitation technology, technical assistance, counseling and guidance, and diagnosis and treatment.

Characteristics that put employed VR applicants at risk of losing employment included being female, having a secondary disability, working fewer hours, having less education, and having a previous unsuccessful closure with VR; employed consumers who received on-the-job supports (short term), diagnosis and treatment, and rehabilitation technology were more likely to retain or advance in employment (Authors, in press-b).

Other research concerning job retention and career advancement among persons with vision loss is more dated. Strategies promoting job retention reported by rehabilitation providers have included: communication among the various parties in the rehabilitation process, creative strategies, appropriate consultations, timely delivery of services, and supervision of the rehabilitation process (Sikka & Stephens, 1997). Reported barriers to job retention or career advancement for persons with vision loss have included transportation, delays acquiring assistive technology, and stress, but technology was also reported to promote job retention and advancement (Crudden & Fireison, 1997; Rumrill, Schuyler, & Longden, 2007).

We investigated VR policies and processes associated with job retention and career advancement of persons with visual disabilities in response to the recent attention to these topics by WIOA and CSAVR. Our research questions included: What VR policies and processes are in place concerning job retention and career advancement services? How are job retention services, such as provision of assistive technology or training, implemented? What is the expected impact of the emphasis on career advancement services?

## **Method**

### **Participants**

VR agency administrators or representatives from all 50 states and the District of Columbia providing services to consumers who are blind or have low vision participated in a telephone survey. The state representative listed with CSAVR or the National Council of State Agencies for the Blind (NCSAB) was asked to participate or recommend a designee. Twenty-seven agency respondents were the contact person for either CSAVR or NCSAB, 23 respondents were their designees, and one respondent was a direct contact. Of the 51 representatives, 27 (52.9%) were from combined agencies and 24 (47.1%) were from separate agencies. Of the 23 designees, 11 were the directors of blind services and 12 were either the assistant or deputy directors or other high-level administrators. Representatives of combined agencies were asked to report, to the best of their ability, only for services concerning persons who are blind or have low vision.

### **Procedure**

Researchers conducted qualitative interviews with five agency administrators to determine questions for the national vocational rehabilitation agency directors' survey. The survey was pilot tested with three retired VR agency for the blind directors and then three current VR agency administrators. The survey was submitted to CSAVR and NCSAB with a request to approve and support this research prior to additional contacts with state agencies. CSAVR provided additional feedback about survey items.

The final survey consisted of 18 questions about job retention, 7 questions about career advancement, one question about agency type (i.e., combined or separate), and additional items about other WIOA topics. Survey items addressed official and unofficial policies regarding job retention and career advancement, and anticipated policy changes in response to WIOA legislation. Of agencies with official policies, 27 provided copies of their policies concerning job

retention and career advancement. Survey questions specific to job retention included items about expediting eligibility of services, staff who assist in job retention cases, procedures for purchasing assistive technology, collaboration with employers for assistive technology purchases, consumer's financial resources, services provided at the job site, outreach to consumers and employers, and tracking job retention and the number of recognized postsecondary credentials earned by consumers. Career advancement items included the impact on the agency to serve persons seeking career advancement, documentation to facilitate advancement, and consumers' financial resources.

An announcement about the national survey was posted in CSAVR's weekly newsletter, and emails were sent directly to agency directors requesting participation in the research study. Telephone calls commenced when emails produced no response. Researchers scheduled times with agency representatives to conduct the 30 to 45 minute telephone survey, which began in October 2016 and ended in June 2017. Researchers entered agency responses from the telephone interviews in an online survey collector.

### **Data Analysis**

Descriptive statistics were generated for all close-ended survey items. Researchers used directed content analysis to identify themes and classify responses to open-ended survey items. Researchers also used content analysis to examine 27 VR agency policies to determine how agencies handle cases related to job retention or advancement. Themes were identified and reported. Results from this analysis were used to recode responses to items concerning official job retention and career advancement policies and to create new variables. Differences in policies (i.e., official, unofficial, both official and unofficial, and neither official nor unofficial) based on type of agency (i.e., combined or separate) were examined.

## Results

### Job Retention

Agency representatives were first asked if they had an official job retention policy, to which there was almost an even divide with 51% saying they did have an official policy. Of those with a policy, 10 (38.5%) were separate agencies, and 16 (61.5%) were combined agencies. The majority (76.7%,  $n = 23$ ) of agencies without an official policy had an unofficial policy. There was no significant difference in policy (i.e., official, unofficial, both official and unofficial, and neither official nor unofficial) based on the type of agency (i.e., combined or separate). Forty-one percent ( $n = 21$ ) of agencies had changed or were anticipating changing their policies in response to WIOA, 52.9% ( $n = 27$ ) were not changing their policies, and 5.9% ( $n = 3$ ) were undecided.

Agency representatives were asked, “Is there any attempt to expedite eligibility determination and proceed with service delivery more quickly for job retention cases than for other cases?” Fifty-five percent ( $n = 28$ ) of agencies attempt to expedite eligibility determination more quickly for job retention cases than for other cases. Agency representatives were also asked “If job accommodations, such as assistive technology, are necessary are there any different procedures followed for purchasing needed items?” Eighteen percent ( $n = 9$ ) said yes. Several states that did not attempt to expedite eligibility determination or follow different procedures for purchasing assistive technology added that timeliness of eligibility determination and acquisition of assistive technology proceeded quickly for all consumers.

Job retention cases typically require the vocational rehabilitation counselor to work with someone at the consumer’s job site. Representatives were asked “In addition to the VR counselor, are there other staff or resources, such as a business relations consultant or assistive

technology specialist, who are typically called on immediately or very quickly to provide services?” Agency representatives reported that when working with employers, contact about job retention frequently included more than one person, but usually involved the consumer’s supervisor or the business owner (66.7%,  $n = 34$ ), followed by the employer’s human resources department (49%,  $n = 25$ ), and the employer’s information technology person (11.8%,  $n = 6$ ). Human resources departments tended to be involved when businesses were large while business owners tended to be involved when businesses were small. Other VR agency staff who routinely assisted in job retention services provided at the job site can be found in Table 1.

When asked if their states had a strategy that was particularly effective for convincing employers to assume the costs of equipment purchases, the majority had a strategy or a few different strategies, but most did not regard them as particularly effective. The most frequently mentioned strategy (29.4%,  $n = 15$ ) was encouraging larger employers to assume all or some of the costs while relying less on smaller employers, especially where the expense was perceived as potentially more burdensome. Other strategies included: adopting a dual customer approach and working collaboratively with the employer (25.5%,  $n = 13$ ), recommending appropriate equipment to the employer and training the employee (9.8%,  $n = 5$ ), having a clear policy regarding who owns the equipment and specifying responsibilities for future repair and upgrade costs (3.9%,  $n = 2$ ), and referring employers to the Job Assistance Network for information about equipment and modifications (3.9%,  $n = 2$ ). Forty-nine percent ( $n = 25$ ) of agencies considered the consumer’s financial circumstances when purchasing equipment and only 7.8% ( $n = 4$ ) had different financial criteria for job retention cases.

Agency representatives were asked “If the primary service needed is assistive technology assistance, such as scripting to make the employee’s computer system continue to work with the

employer's system, how do you handle service delivery?" More than one response could be given and many agencies said they used different approaches depending on the circumstances. A majority of agency representatives (88.2%,  $n = 45$ ) reported a new case would be opened, but post-employment services were used in some instances (43.1%,  $n = 22$ ). Forty-one percent ( $n = 21$ ) of agency representatives reported they would refer the employer or consumer to another provider for job retention services, if appropriate, but some agencies would assist in paying for those services. Thirty-one percent ( $n = 16$ ) of the agencies use contractors for job retention services, and 27.5% ( $n = 14$ ) provide job retention services without opening a case at all, regarding it as a service to the employer.

Agency representatives were asked, "Do you conduct any outreach/advertising activities directed toward consumers regarding job retention services?" and "Do you conduct any outreach/advertising activities directed toward employers regarding job retention services?" When respondents said yes, they were asked how outreach was conducted. Responses were recorded as occurring through networking, the agency website, or some other way. Agency representatives could report more than one response. Sixty-three percent ( $n = 32$ ) of agency representatives said they did not conduct outreach to consumers about job retention services, and 51% ( $n = 26$ ) did not provide outreach to employers. Percentages for how outreach was provided to consumers and employers when agencies did provide it is found in Table 2.

Due to RSA now requiring agencies to track retention for four quarters after placement, researchers asked agency representatives "How does your agency plan to track this information?" Some agencies are using multiple methods to track this data; 58.8% ( $n = 30$ ) of agencies have arranged to get data from the unemployment insurance program in their state. However, agency representatives acknowledged that unemployment data does not track all

people including the self-employed, clergy, people who work across state lines, and federal employees. Other methods included working with WIOA partners beyond the unemployment offices, such as educational institutions (29.4%,  $n = 15$ ); relying on the counselor to collect this information (17.6%,  $n = 9$ ); requiring VR staff other than the counselor to collect the information (3.9%,  $n = 2$ ); and relying on consumer self-report (3.9%,  $n = 2$ ). Thirty-five percent ( $n = 18$ ) of agencies either do not yet have a plan or are not satisfied with their plan.

Agency representatives were asked their plan to track “recognized postsecondary credentials” per the WIOA requirement. Seventy-three percent ( $n = 37$ ) of agencies have developed a mechanism for tracking this data. Examples of data collection methods included configuring case management systems to remind counselors to collect and enter the information, which relies on counselors engaging in continuous follow up with consumers to obtain records. One agency is using an application on a smartphone to help with data collection. Other agencies were working with WIOA partners, like Department of Education and Department of Labor, via memorandums of understandings and data sharing agreements similar to how they will track retention data.

### **Career Advancement**

Agency representatives were asked if there was an official policy concerning career advancement. Thirty-nine percent ( $n = 20$ ) of the agencies did have a policy, but in some cases, the policy only stated that persons seeking career advancement were eligible for services. Of the agencies with no official policy ( $n = 31$ ), over half (56.3%,  $n = 18$ ) had an unofficial policy. There was no significant difference in policy (i.e., official, unofficial, both official and unofficial, and neither official nor unofficial) based on the type of agency (i.e. combined or separate). Almost 61% ( $n = 31$ ) of agency representatives had or anticipated changing their

policies concerning career advancement, 35.3% ( $n = 18$ ) were not, and 3.9% ( $n = 2$ ) were unsure if policies would change. Several agency representatives expressed the need to provide additional training to staff about determining eligibility for career advancement services rather than changing policy. Some agency representatives said that the focus on other WIOA changes took precedence over potential career advancement changes. Agency representatives were asked “What impact do you anticipate the requirement to serve persons seeking job advancement will have on your agency?” and “What documentation or information do you need to confirm that services will facilitate job advancement?” Responses were tallied and are reported in Table 3.

### **Policy Analysis**

The research team reviewed the 27 policies submitted by state agencies or downloaded from VR agency websites per the representative’s direction. Two researchers reached consensus identifying themes and categorizing policies within those themes. Identified themes included eligibility statements, use of post-employment services, financial issues, what and where services could be provided, working with WIOA partners, timeliness of service, documentation requirements, and retention as a service to employers. Specific numbers and percentages are not included because the passages submitted and analyzed may not be comprehensive of the agencies’ policies and some agencies may have policies that were not available for review.

Our analysis found that almost all of the available policies addressed eligibility and in many cases, policy regarding job retention was limited to eligibility. An example of these statements was:

The individual requires vocational rehabilitation services to prepare for, secure, retain, advance in, or regain employment

consistent with his or her unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

After eligibility, the most frequently mentioned job retention issue was clarification regarding the use of post-employment services for job retention. Most of these policies included statements that if the consumer had a previous successful closure with the agency, post-employment was the preferred method to provide job retention services. However, use of post-employment services for retention varied by state and some state policies provided clarification regarding its use. For example:

Post-employment services may be provided after the individual has been closed as Rehabilitated (Status 26) and needs services to maintain, regain, or advance employment...These services are available to meet rehabilitation needs that do not require a complex and comprehensive provision of services and thus, should be limited in scope and duration...Post-employment services will not exceed 18 months; however, an extension of time can be requested...

Or from another state:

Job retention services are different than (sic) post-employment services. Post-employment services are limited in nature and scope, require a financial need assessment and are normally provided within 12 months of a successful case closure. Job retention services may be provided at any time.

A few other states also included a statement regarding financial issues associated with job retention. Examples included:

In addition, comparable services and benefits need not be pursued if: (b) an immediate job placement would be lost due to a delay in the provision of comparable services and benefits.

Or from another state:

Job retention services are restricted to include only those services needed to assist an individual in learning their job duties, to address work site behaviors, and/or worksite accommodations.

These services are exempt from financial need.

As above, a few states addressed either what services were approved or were not approved for job retention. Other policies mentioned where job retention services could be procured, such as from a community rehabilitation provider (CRP) or a business relations/placement specialist. Some policies addressed limits to job retention services. Note that in this example, the policy limits the employment options for someone receiving job retention services:

Job retention services may only be provided for eligible individuals with a disability that creates permanent functional limitations who need work place adjustments, accommodations or O&M to perform the required job duties in order to maintain employment or return to employment from extended leave with the same employer.

Several states provided guidance for how to document job retention services and a couple of states mentioned coordinating job retention services with WIOA partners. Some state agencies had policies to facilitate timely service delivery so jobs that were potentially in jeopardy did not result in job loss. Examples of these policies included:

The progression for rehabilitation services for all plan types should be rapid and responsive to the needs and pace of the individual participant and situation. Due to the critical impact of saving a current job for job retention plan types, eligibility, plan, assessments and service provisions should be expedited and priority given for all staff work supporting the job retention case.

Some agencies addressed job retention as a service to both consumers and employers. Those policies included statements such as:

Job placement services include, but are not limited to, the following types of activities:...Identifying employees who need vocational rehabilitation services for job retention or advancement...Services provided directly to employers may facilitate the hiring and retention of individual clients or other people with disabilities by enhancing employer awareness of their abilities and fostering an employment environment within which physical or mental impairments may be accommodated more effectively. Therefore, employer services also are considered job placement services...

Only two states had detailed policies regarding how to determine eligibility for and how to provide job retention services. One of these states had a separate job retention policy document that explained application and eligibility and other case management issues; clarified roles of each party; defined terms, resources, and responsibilities; provided forms, and guidance for meetings with consumers and employers; and gave guidelines for handling issues specific to job retention, including: rapid response, cost containment, and confidentiality issues.

### **Discussion**

It will likely take several years to determine how WIOA legislation will shape state VR agencies' policies and service delivery systems. This survey of the state agencies provides a picture of their status with respect to issues concerning job retention and career advancement for consumers who are blind or have low vision. Our results indicate that while some agencies have made or expect to make shifts in policy and service delivery in these service areas, others view the WIOA changes regarding job retention and career advancement as consistent with their existing systems.

State VR agencies are almost equally divided among those that have policies to address job retention services and those that do not. However, some agency policies are brief, stating only that VR applicants who are eligible may receive services to promote retention, or giving guidance regarding how to determine eligibility for employed persons with disabilities. Only a few states have detailed policies about job retention. It appears only one state has a long-standing job retention policy that addresses a number of issues, including defining job retention as a component in their "Integrated Disability Management" system; providing guidance regarding eligibility determination; detailing documentation and best practices in retention case

management; and working with employers. Some agencies may have previously found it unnecessary to have detailed job retention policies, but over 40% had changed or were expected to change in response to WIOA and an additional 5.9% were undecided about making changes. States making or considering changes may use the policies in other states as a framework from which to evaluate potential changes. Some agencies without job retention policies have adopted informal policies or procedures, thus recognizing that, at least in some cases, the agency was providing job retention services.

Agency representatives appeared very cognizant of the importance of timely service delivery to persons needing job retention services. This was reflected in both official policies that included “rapid response” to persons needing retention services, as well as informal policies to facilitate prompt eligibility determination. Other representatives reported that their agencies responded to all eligibility and service delivery needs promptly and a policy to expedite job retention services was unnecessary. Although delays getting assistive technology were previously identified as a barrier to job retention (Crudden & Fireison, 1997), it appears most agency representatives have implemented procedures to acquire equipment for job retention cases that are efficient and timely.

Employed consumers may have difficulty leaving their job sites to receive rehabilitation services. Agencies have addressed this by providing a number of important retention services at the job site. A variety of personnel may be required to facilitate job retention but assistive technology specialists were the most frequently involved. How agencies responded to requests for technology assistance varied depending upon the specifics of the case and consumer needs. Tracking consumers four quarters after placement could provide a mechanism for identifying post-employment needs but that might not occur if the tracking does not involve contact with the

consumer. Many agency representatives, particularly those using only one approach, expressed concern about their plans for tracking for four quarters after placement. Incorporating a tracking mechanism that includes contact with the consumer is suggested.

A number of agencies are predominantly relying on VR counselors, with reports from consumers, to document acquisition of post-secondary credentials. Obtaining this documentation can potentially take valuable time from VR counselors' already busy schedules. VR administrators might consider whether support staff could be used to contact consumers and acquire appropriate documentation to meet this WIOA requirement.

WIOA requires that VR agencies assist employers in retaining their employees with disabilities, but less than half of the agencies engage in outreach to employers regarding job retention services, usually through personal networking. Even fewer agencies engage in outreach to consumers regarding job retention. It appears VR agencies could expand their outreach efforts in this area. Building networks with employers by providing retention services keeps persons with vision loss in their jobs, opens doors to new placements for other consumers with vision loss, and addresses the WIOA charge to assist employers in retaining employees with disabilities.

Although 60.8% of agency representatives reported that they have changed or are considering changes to their career advancement policies, 29.4% of the representatives said that WIOA changes associated with career advancement are not expected to affect their agencies. However, an equal number (29.4%) anticipate a financial impact, with 9.8% expressing concern about the change leading to implementation of an order of selection policy. While no agency representatives said that career advancement services were not provided, some expressed the

need to provide additional training to staff and to clarify eligibility determination for this service, indicating that service delivery for career advancement could expand.

Some VR agencies require additional documentation, beyond eligibility determination, to support that VR services will assist an employed person in advancing in their career. This additional documentation may include labor market data or a vocational assessment, but in some cases, requires support from the employer. This is notable because WIOA regulations do not require career advancement to be with the same employer. For some consumers, career advancement may include changing employers and a consumer may elect to keep their plan to advance from their current employer. One agency representative said their agency required work experience after earning an undergraduate degree before supporting graduate education. As consumers' awareness about the availability of career advancement services increases, requests for this service may also increase. It would be helpful if the RSA-911 case service dataset that documents consumer application and receipt of services included a system for distinguishing between consumers who receive job retention services and those seeking career advancement.

A number of agency representatives reported having unofficial policies to address both job retention and career advancement. It might be helpful to work with agency staff to evaluate whether all of them are aware of and operate using these unofficial policies. Agencies may find it helpful to make some of these unofficial policies official.

### **Conclusion**

VR agencies are modifying policies, service delivery systems, and documentation procedures in response to WIOA legislation associated with job retention and career advancement. This focus on not just finding an entry level job but finding a career path that leads to economic self-sufficiency presents a bigger change for some agencies than for others. As

agencies respond to these challenges, it is important to monitor the data for potential changes in the VR services provided and consumer outcomes. Further research to determine if consumers are experiencing differences in service delivery will add further information about how WIOA may change the VR system.

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Table 1

*Staff who Assist in Job Retention and Services Typically Provided at the Job Site*

<b>Variable</b>	<b>Percent</b>	<b>N</b>
<b>Staff or Resources who Assist</b>		
AT Support	84.3	43
Business Relations Specialists	51	26
Rehabilitation Teachers and Orientation & Mobility Specialists	39.2	20
Vendors, Contractors, and Community Resource Providers	15.7	8
Job Coach	7.8	4
Administrators and Supervisors	3.9	2
Other	7.8	4
<b>Services Provided at Job Site</b>		
Job Modification	100	51
Assistive Technology Evaluation	100	51
Orientation & Mobility Training	100	51
Functional Low Vision Evaluation	88.2	45
Other Personal Adjustment	70.6	36

Table 2

*Percentage Retention Outreach Strategies*

<b>Type of Outreach</b>	<b>Consumers</b>		<b>Employers</b>	
	<b>Percent</b>	<b>N</b>	<b>Percent</b>	<b>N</b>
Website	23.5	12	15.7	8
Network	21.6	11	45.1	23
Other	19.6	10	9.8	5

Table 3

*Anticipated Impact of Career Advancement and Documentation to Confirm Services*

<b>Variable</b>	<b>Percent</b>	<b>N</b>
Anticipated Impact of Career Advancement		
None	29.4	15
Financial	29.4	15
Positive	19.6	10
New Policies	17.6	9
Increased Caseload	17.6	9
Order of Selection	9.8	5
Outreach	5.9	3
Improved Outcome Rates	3.9	2
Other	7.8	4
Documentation for Career Advancement		
Eligibility	39.2	20
Labor Market Information	31.4	16
Employer Information	27.5	14
Client Report	17.6	9
Vocational Assessment	17.6	9
Employment Goal	15.7	8
Counselor Judgement	11.8	6
Other	7.8	4