

**IMPACTING AN INDUSTRY:  
ALIGNING TRADE ASSOCIATION VALUE WITH  
MEMBER NEEDS AND MARKET DEMANDS**

By

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An Applied Doctoral Project

Submitted in Partial Fulfillment of the Requirements for the Degree of  
Doctor of Business Administration

**DeVoe School of Business, Leadership, and Technology**

INDIANA WESLEYAN UNIVERSITY



## Signature Page

# IMPACTING AN INDUSTRY: ALIGNING TRADE ASSOCIATION VALUE WITH MEMBER NEEDS AND MARKET DEMANDS

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## **Dedication**

This project is dedicated to my family who provided unwavering support during my doctoral journey and who sweetened the experience with lots of cake.

## Acknowledgments

I would like to thank the following people, without whom I would not have been able to complete this research, and without whom I would not have made it through my doctoral program.

From Indiana Wesleyan University National & Global, thank you to my research chair, Dr. Zehr, for challenging and guiding me throughout this project. Thank you to Dr. Carpenter for being the sounding board and cheerleader I needed in the most difficult of times. Thank you to my PBL team, the DreamTeam, for offering your encouragement, camaraderie, and unfailing support as we navigated the doctoral highs and lows together.

From the Ohio Providers Resource Association, thank you to President Peter Moore and Vice President Scott Marks for allowing me to partner with your organization and taking the time to provide the information needed for this research.

From PARTNERS in Employment, Inc., thank you to my coworkers for your persistent, stalwart support in my pursuit of personal and professional growth. Your relentless encouragement to keep pushing, maintain balance, and fully feel the wins and losses added so much to this experience. I am blessed beyond measure to be a part of such an amazing team.

Finally, I cannot begin to express my gratitude to my family. To my husband Stephen, thank you for your love and for choosing to walk by my side every day, to whatever end. I am so thankful our boys have such an amazing role model to follow. To my sons, Calvin and Simon, thank you for cheering me on, being patient as I worked on homework, giving me extra hugs when the going got tough, and being quick to celebrate victories. You are kind, respectful young men, and I cherish every moment with you!

## Modifications to APA

This paper uses the style format in the *American Psychological Association Publication Manual* (7th ed.). As an applied doctoral project, there were instances where modification of the American Psychological Association *APA Style* format was necessary or desirable. The following modifications apply to this ADP.

**Abbreviations.** All abbreviations are included in the list, regardless of the number of times used in the study.

**Capitalization.** All models, theories, and concepts are capitalized.

**Figures and Tables.** Figure and table labels are placed below the graphics and written in title case. The labels are shown in bold with a period.

**Footnotes.** Footnotes include notation information for figures and tables and additional information as necessary.

**Headings.** APA heading levels were modified for aesthetics and the use of EMT-branded colors:

- Level 0: 16-pt Calibri, blue, centered, bold, title case (Section headings only)
- Level 1: 14-pt Calibri, blue, left justified, bold, title case
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**Images.** Notes beneath the images are formatted according to the requirements of the copyright holders.

**Layout.** Full justification is used for all narrative content in the report except lists and tables.

**Page Numbers.** Page numbers are located at the bottom center instead of the top right.

**Spacing.** Single-line spacing is used throughout this ADP. This format limits the report's length and helps blend the scholar-practitioner concepts and techniques in this consulting report. Additional spacing is used if a heading falls at the end of a page. Paragraph indentation is not used.

## List of Tables

Table	Title	Page
<b>Table 1.</b>	Revenue of Various Trade Associations .....	20
<b>Table 2.</b>	OOD Utilization and Performance .....	23
<b>Table 3.</b>	Descriptive Statistics for Average Wage and Hours by Specialists' CESP Status.....	65
<b>Table 4.</b>	Summary of Placements by Specialists' CESP Status.....	66
<b>Table 5.</b>	Descriptive Statistics for Placements by Specialists' CESP Status.....	67
<b>Table 6.</b>	Characteristics of Three Options for Strategic Positioning.....	75
<b>Table 7.</b>	Potential Solutions Using the Delta Model .....	75
<b>Table 8.</b>	Ranking Potential Solutions Using the McKinsey 7-S/VBM Combined Model.....	77
<b>Table 9.</b>	Risk Assessment for Potential Solutions.....	82
<b>Table 10.</b>	Change Management Action Plan .....	100
<b>Table F1.</b>	Summary of Starting Wage by Specialists' CESP Status.....	132
<b>Table F2.</b>	Summary of Hours by Specialists' CESP Status.....	133
<b>Appendix G.</b>	OPRA Raw Employment Outcomes Dataset .....	134

## List of Figures

Figure	Title	Page
<b>Figure 1.</b>	<b>OPRA’s Role in the VR Industry .....</b>	<b>6</b>
<b>Figure 2.</b>	<b>Education and Workforce Engagement Comparison With and Without Disabilities.....</b>	<b>15</b>
<b>Figure 3.</b>	<b>Comparison of Income With and Without Disabilities .....</b>	<b>15</b>
<b>Figure 4.</b>	<b>2023 Strategic Plan Framework .....</b>	<b>25</b>
<b>Figure 5.</b>	<b>SWOT Analysis.....</b>	<b>30</b>
<b>Figure 6.</b>	<b>Analysis of OPRA’s Strategic Plan Using the VBM .....</b>	<b>31</b>
<b>Figure 7.</b>	<b>Map of State Qualifications.....</b>	<b>40</b>
<b>Figure 8.</b>	<b>Coalition Model for Professional Development.....</b>	<b>48</b>
<b>Figure 9.</b>	<b>Communication Framework Model of Lobbying .....</b>	<b>50</b>
<b>Figure 10.</b>	<b>Responsible Lobbying Model .....</b>	<b>51</b>
<b>Figure 11.</b>	<b>NOISE Analysis Diagram .....</b>	<b>56</b>
<b>Figure 12.</b>	<b>The Delta Model .....</b>	<b>58</b>
<b>Figure 13.</b>	<b>McKinsey 7-S and VBM Combined Model .....</b>	<b>59</b>
<b>Figure 14.</b>	<b>Average Starting Wages by Specialists With a CESP .....</b>	<b>64</b>
<b>Figure 15.</b>	<b>Average Starting Wages by Specialists Without a CESP .....</b>	<b>64</b>
<b>Figure 16.</b>	<b>Average Weekly by Specialists With a CESP .....</b>	<b>64</b>
<b>Figure 17.</b>	<b>Average Weekly by Specialists Without a CESP .....</b>	<b>64</b>
<b>Figure 18.</b>	<b>Total Placements by Specialists With a CESP .....</b>	<b>66</b>
<b>Figure 19.</b>	<b>Total Placements by Specialists Without a CESP.....</b>	<b>66</b>
<b>Figure 20.</b>	<b>Placements by Specialists’ CESP Status Boxplot .....</b>	<b>66</b>
<b>Figure 21.</b>	<b>Multiple Solutions Framework NOISE Analysis .....</b>	<b>74</b>
<b>Figure 22.</b>	<b>Effecting Change in Employment Specialist Qualifications .....</b>	<b>84</b>
<b>Figure 23.</b>	<b>ADKAR Change Model.....</b>	<b>88</b>
<b>Figure 24.</b>	<b>Senge's Learning Organization .....</b>	<b>89</b>
<b>Figure 25.</b>	<b>Virtuous Business Model .....</b>	<b>90</b>
<b>Figure 26.</b>	<b>Customized Change Model .....</b>	<b>92</b>
<b>Figure 27.</b>	<b>Change Vision: When Everyone Wins .....</b>	<b>94</b>
<b>Figure 28.</b>	<b>Change Management Implementation Timeline .....</b>	<b>97</b>
<b>Figure F1.</b>	<b>Boxplot of Starting Wage by Specialists’ CESP Status .....</b>	<b>132</b>
<b>Figure F2.</b>	<b>Boxplot of Hours by Specialists’ CESP Status .....</b>	<b>133</b>

## List of Abbreviations

Abbreviation	Name
ACRE	Association of Community Rehabilitation Educators
ADP	applied doctoral project
ANCOR	American Network of Community Options and Resources
APA	American Psychological Association
APR	April
APSE	Association for Persons Supporting Employment First
CARF	Commission on Accreditation of Rehabilitation Facilities
CESP	certified employment specialist professional
CPI-U	Consumer Price Index-Urban
CRP	community rehabilitation provider
DEC	December
DODD	Ohio Department of Developmental Disabilities
DSP	direct support professional
NAICS	North American Industry Classification System
FEB	February
FMEA	failure mode and effect analysis
GED	General Education Development
GRF	General Revenue Fund
IPS	individual placement and support
KPI	Key performance indicator
OCT	October
OLIG	Office of the Legislative Inspector General
OOD	Opportunities for Ohioans with Disabilities Agency
OPRA	Ohio Provider Resource Association
PAC	Political Action Committee
RPN	risk priority number
RSA	Rehabilitation Services Administration
RSC	Rehabilitation Services Commission
START Up	Setup for Technology Access Readiness Training
SWOT	strengths, weaknesses, opportunities, threats
TBD	to be determined
VBM	virtuous business model
VR	vocational rehabilitation
WIOA	Workforce Innovation and Opportunity Act

# Table of Contents

Signature Page .....	ii
Copyright Page .....	iii
Dedication .....	iv
Acknowledgements.....	v
Modifications to APA.....	vi
List of Tables.....	vii
List of Figures .....	viii
List of Abbreviations.....	ix
Table of Contents .....	x
EXECUTIVE SUMMARY .....	1
Problem Identification.....	1
Diagnosing the Problem.....	1
Exploring Potential Solutions .....	1
Multiple Perspective Inquiry .....	2
Change Management Approach .....	2
SECTION 1: PROBLEM IDENTIFICATION AND INVESTIGATION .....	3
Organization Overview.....	5
Problem Description .....	6
Problem Scenario .....	6
Discovery and Identification of the Problem.....	8
Significance of the Problem .....	9
Broader Implications of the Problem.....	9
Purpose of the Project .....	10
Significance of the Project.....	11
Definitions of Key Terms.....	11
Summary .....	12
SECTION 2: DIAGNOSING THE PROBLEM .....	13
Presenting Problem.....	13
Environmental At-A-Glance .....	14
Social Climate.....	14
Technology .....	16
Economy.....	16
Environment.....	16
Politics.....	17
Law .....	17
Ethics.....	18
Industry At-A-Glance .....	19
Competitive Environment .....	19
Vocational Rehabilitation Industry information.....	22
Organizational At-A-Glance .....	23
Mission.....	23
Culture .....	24
Strategic Plan .....	24
Impact of Environmental Analysis.....	26
Impact of Industry Analysis.....	26
McKinsey 7-S Model Analysis of the Organization.....	26

SWOT Analysis of the Organization.....	30
Virtuous Business Model Analysis of the Organization.....	30
Value of Study .....	32
Diagnosing the Problem.....	32
Known Facts Associated With the Problem .....	33
Assumptions Associated With the Problem.....	33
Knowledge Gaps Associated With the Problem.....	33
Hunches, Ideas, and Hypotheses Associated With the Problem .....	33
Ideation of Solutions Associated With the Problem .....	34
The VBM: Additional Perspectives of the Problem.....	34
Problem Statement .....	34
Driving Research Question.....	35
Guiding Questions.....	35
Scope of Study.....	36
Assumptions.....	36
Limitations.....	36
Delimitations.....	36
Potential Conflicts of Interest .....	37
Summary .....	37
SECTION 3: EXPLORING SOLUTIONS .....	38
Perspectives of the Problem .....	38
Comprehensive Review .....	39
Variations Among States.....	39
Impact of Credentials.....	42
Measures of Quality Services.....	44
Benchmarking .....	46
Best Practices .....	47
Research Methodology .....	52
Synopsis of the Literature .....	53
Identification of Potential Solutions.....	53
Need for Further Investigation.....	54
Summary .....	54
SECTION 4: MULTIPLE PERSPECTIVES AND TEST SOLUTIONS .....	55
Multiple Perspectives Framework.....	55
NOISE Analysis .....	56
Delta Model Analysis .....	57
McKinsey 7-S and Virtuous Business Model Analysis .....	58
Planned Inquiry .....	59
Research Methodology .....	60
Research Method.....	60
Data Sources and Collection Procedures .....	60
Research Analysis.....	63
Employment Outcomes Data Analysis .....	63
Semi-Structured Interviews Data Analysis .....	67
Research Findings.....	69
Finding 1: The CESP: Indicator of Quality Employment Outcomes.....	70
Finding 2: The Cost-Benefit of the CESP Carries by CRP. ....	70
Finding 3: CRPs Face Varying Barriers. ....	72

Finding 4: Interactions With OOD Negatively Impact Views on the CESP.....	72
Finding 5: The CESP Credential Positively Influences Employment Specialists.....	72
Finding 6: The Dichotomy of Ppinions Suggests an Opportunity.....	72
Identification of a Multiple Solutions Framework.....	73
NOISE Analysis .....	73
Delta Model Analysis .....	74
McKinsey 7-S/VBM Combined Model Analysis.....	76
Alternative Solutions Explored.....	77
Potential Solutions Explored .....	78
Test Solution Identification and Basis for Selection .....	82
Recommendations .....	83
Rigor of the Research .....	84
Dependability, Credibility, Transferability, Confirmability.....	85
Limitations and Generalizability.....	85
Summary .....	85
SECTION 5: CHANGE MODEL.....	86
Making the Case for Change: Reframing the Organization .....	87
Using a Multiframe Perspective: Planned Change Intervention Model.....	87
ADKAR Change Model.....	88
Senge’s Learning Organization Framework.....	88
VBM Framework .....	89
Customized Change Management Model.....	90
Change Management Plan .....	92
Awareness/Mental Model Phase.....	93
Desire/Shared Vision Phase .....	93
Knowledge/Personal Mastery.....	93
Ability/Team Learning .....	93
Reinforcement/Systems Thinking .....	93
Type and Scope of Change .....	93
Intended Outcomes and Benefits .....	93
Assessment of the Impact of the Proposal .....	94
Change Through the Lens of the VBM .....	95
Stakeholder Analysis .....	95
Potential Impact of the Change on the Organizational Culture.....	96
Estimated Duration .....	96
Estimated Costs.....	97
Organizational Barriers to Change: Reinforcement Strategies.....	97
Measuring Change Performance .....	97
Scenario Planning.....	98
Action Plan .....	98
Conclusion.....	100
References.....	103
Appendix A: Presentation and Authorization Review .....	121
Appendix B: Institutional Review Board Approval Documents .....	123
Appendix C: Semi-Structured Interview Questions .....	124
Appendix D: Organization Authorization and Sample Informed Consent.....	125
Appendix E: Individual State Requirements for Employment Specialists .....	128
Appendix F: Additional Descriptive Analysis of Quantitative Data .....	132

Appendix G: OPRA Employment Outcomes Data Set .....	134
Appendix H: Thematic Analysis .....	135
Appendix I: Copyright Permissions .....	138

## EXECUTIVE SUMMARY

Trade associations work to support business interests by researching new services, upholding quality standards, and lobbying government officials (North American Industry Classification System Association, n.d.-a). They provide crucial industry information, help businesses adapt to changes, and focus on advocacy with government agencies (Betton et al., 2019). Key trends include enhancing membership value, improving organizational strength, diversifying revenue, and adapting to new business models and technology (McKinley Advisors, 2022).

The Ohio Provider Resources Association (OPRA) is a trade association for businesses working in the Ohio vocational rehabilitation (VR) industry. This industry focuses on helping individuals with disabilities gain access to employment and employment-related activities. For OPRA to operate successfully, it is crucial that OPRA leadership thoroughly understand the inner workings of VR in Ohio.

### Problem Identification

As a trade association, OPRA leadership desires to position the agency as one that alleviates or resolves VR industry problems. OPRA leadership notes that the current qualification requirement for employment specialists is creating barriers in the VR field. Member agencies are struggling to have their staff meet the qualification requirement in sufficient numbers, creating wait lists for individuals with disabilities seeking employment assistance and blocking available workers from employers. OPRA leadership recognizes that the largest hurdle to overcome is the overwhelming need for more information on the nuances of the complex problem.

### Diagnosing the Problem

As a trade association, OPRA must have a thorough understanding of the trade association industry and the VR industry to operate effectively. This section examines the environment, trade association industry, VR industry, and OPRA organization. From there, the problem begins to be diagnosed with an assessment of known facts, assumptions, knowledge gaps, hunches, and ideations of solutions.

The driving question presents the focus of further study:

How can OPRA secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio vocational rehabilitation industry to positively impact individuals with disabilities and employer workforce needs?

### Exploring Potential Solutions

A comprehensive literature review provides insight into the multiple aspects of the problem. The review includes consideration of the variations in state qualifications for employment specialists, the impact of credentials on industries, and measures of quality employment specialist services. The literature review also supplies a greater understanding of trade association benchmarking, best practices in providing professional development, and best practices in stakeholder influences. Gaps in the literature were identified for further investigation.

## **Multiple Perspective Inquiry**

The multiple perspectives framework influences research design, findings, and creation of test solutions. The frameworks for this study include the Noise Analysis, the Delta Model, and a combined McKinsey 7-S/Virtuous Business Model. The researcher used thematic analysis to explore a secondary qualitative dataset and primary research through qualitative semi-structured interviews. The researcher then used the framework tools to create, evaluate, prioritize, and recommend an optimal test solution.

After a comprehensive review of potential solutions and with consideration of the previous literature review, the researcher created the optimal test solution for OPRA:

OPRA leadership should offer one-day virtual training to help employment specialists meet the certified employment specialist professional training requirement, add a new CESP training track to semi-annual conferences, and create a synergistic relationship with the Association of People Supporting Employment First, the creator of the CESP credential.

## **Change Management Approach**

The customized change management model implements the approved solution, strategically positioning OPRA to remove barriers to employment specialist qualifications while increasing the agency's non-dues revenue and member engagement. This section makes a compelling business case for change, highlighting how the proposed change answers the driving research question. A multiple perspective of change management integrates the ADKAR Change Model, Senge's Learning Organization, and the Virtuous Business Model into a change management plan. This section then offers details of the change, including scope, stakeholder impact, measurement of change, scenario planning, and an action plan.

## SECTION 1: PROBLEM IDENTIFICATION AND INVESTIGATION



*Note.* From *Disabled Icon. Worker Injury and Disability* [Photograph], by Andrey Popov, n.d., Getty Images.

Employment equality may begin with equal access to jobs, but it is about more than access to employment. It is about having equal access to life. The reality is that many individuals with disabilities want to work (Aichner, 2021). They want to live and reap the rewards of participating in the workforce.

Different organizations exist and work together to help individuals with disabilities successfully work in the community with non-disabled peers. Each state has a (VR) agency that aims to expand the number of individuals with disabilities who are gainfully employed in the labor market (Rehabilitation Services Administration, n.d.-a). Ohio's vocational rehabilitation agency is the Opportunities for Ohioans with Disabilities Agency (OOD). OOD provides the structure of VR services and regulates how other organizations may provide employment services to individuals with disabilities. In OOD's provider manual, many employment services are available to address various needs and barriers individuals may have to get a job.

Community rehabilitation providers (CRPs) are organizations that state vocational rehabilitation agencies can contract to provide employment services. Employment specialists work for CRPs and work directly with individuals with disabilities. In Ohio, CRPs provide employment services as instructed by OOD to help people with disabilities achieve their employment goals. OOD decides which services an individual receives, and CRPs provide the specified services within the stipulated guidelines.

The Association of People Supporting Employment First (APSE), a professional organization, promotes independent, integrated employment for individuals with disabilities. APSE members are professionals in the vocational rehabilitation field, students of vocational rehabilitation courses, advocates, family members, and individuals with disabilities (Association for People Supporting Employment First, n.d.-a). APSE created the certified employment specialist professional (CESP) credential to professionalize the employment specialist position (Association for People Supporting Employment First, 2020). In providing a credential, APSE intended to aid the employment specialist in doing their job and give the individual with a disability a sense of working with a knowledgeable and trustworthy expert (T. Nelles, personal communication, July 17, 2023).

Each of the above organizations plays a different role within the VR industry. Still, the goal is the same – to help individuals with disabilities find and keep gainful, independent employment. These organizations are keenly aware of the current inequality in employment for individuals with disabilities. For instance, 79% of individuals of working age with a documented disability are not participating in the workforce, compared to 31% of individuals without a disability (U.S. Bureau of Labor Statistics, 2022, Table A). As of March 2023, the unemployment rate for people with disabilities was 9% versus the 3.5% unemployment rate for people without a disability (U.S. Department of Labor, 2023, Persons with a Disability Table 7). At this same time, more job openings existed than people in the labor force (U.S. Bureau of Labor Statistics, 2023). Access to employment for individuals with disabilities is critical not just for the individuals but for employers and the labor force as well.

The VR industry needs to work effectively because having a job has unique benefits. Individuals with disabilities believe employment is “important to feeling like part of society” (Voermans et al., 2020, p. 246). Palis et al. (2018) found a significant positive correlation between community belonging and mental health. Self-esteem significantly increases for an individual with a disability when competitively employed (Gold et al., 2016). The improved social quality of life “suggests that positive experiences gained from competitive work spilled over into these participants’ everyday lives, so they enjoyed spending time at home, perceived greater respect from friends and family participants, and/or had more enjoyable leisure activities” (Gold et al., 2016, p. 166). Meade et al. (2015) found that individuals with disabilities benefitted from community employment through social belonging, increased confidence, improved mental and emotional health, and financial independence. Most importantly, Meade et al. (2015) found that “participants felt better about themselves when they had a reason to get up in the morning, a place to go, and activities to accomplish that they view as important and valued by others” (p. 8). Equal access to employment allows equal access to the carryover advantages of working. Individuals with disabilities gain access to a better overall life when working in competitive employment.

When the VR industry is not working correctly, access to employment equality becomes difficult. Individuals with disabilities suffer most significantly when VR is hindered, but they are not the only ones affected. Employers also need access to a source of labor and a more diversified workforce.

VR is an industry dedicated to helping disabled individuals find and keep employment while assisting employers in meeting labor needs. CRPs are agencies that state VR agencies pay to provide VR services. Employment specialists work one-on-one with individuals with disabilities and employers to make successful integrated community employment a reality.

The Ohio Provider Resource Association (OPRA) is a trade association dedicated to helping CRPs through advocacy, information, and resources (S. Marks, personal communication, March 29, 2023). OPRA leadership has identified a possible inefficiency in Ohio’s VR field. In Ohio, the state VR agency OOD has required CRPs to have their employment specialists earn a CESP credential to provide a particular employment service (Opportunities for Ohioans with Disabilities Agency, 2019). OPRA believes this requirement, along with market conditions, has created service inadequacies that have disproportionately affected CRPs and individuals with disabilities. However, OPRA leadership recognizes that the current gaps in knowledge surround the CESP. To stay true to the commitment to advocacy, information, and resources, OPRA wants to move the industry through this issue and, in turn, demonstrate the value of membership to current and potential members.



*Note.* Image from OPRA (n.d.). Used with permission.

## Organization Overview

OPRA is an Ohio trade association of organizations providing facility, community, and employment services to individuals with intellectual and developmental disabilities. OPRA leadership focuses on building a statewide service system that meets the needs of individuals and service providers. OPRA has around 200 member agencies serving approximately 30,000 individuals with intellectual and developmental disabilities (S. Marks, personal communication, March 29, 2023).

OPRA is a 501(c)(6) nonprofit organization located in Columbus, Ohio. Nine employees work for OPRA, with one serving as supervisor to the other eight. OPRA has an operating budget of \$2–2.5 million (CauseIQ, 2021, Total Revenues Chart).

OPRA was initially founded in 1974 and focused primarily on residential service providers (S. Marks, personal communication, March 29, 2023). Medicaid funding was expanded to home and community-based care for individuals with intellectual and developmental disabilities around this time (Gould, 2023). Individuals with intellectual and developmental disabilities transitioned from large state-run facilities to small, privately-owned settings and private homes within communities. As community-based services expanded, so did OPRA leadership’s focus and member interests. Currently, OPRA represents service providers whose range of support includes intermediate care facilities, day services, residential services, and competitive employment.

OPRA maintains working relationships with two executive state agencies—the Ohio Department of Developmental Disabilities (DODD) and the Opportunities for Ohioans with Disabilities Agency. OPRA staff also have relationships with many members of the Ohio state legislature. OPRA’s members are overwhelmingly engaged with OPRA leadership’s priorities and OPRA activities. Typically, over 300 people from member agencies attend OPRA’s virtual meeting on Fridays (S. Marks, personal communication, March 29, 2023). Between 120–140 members participate in bimonthly day service committee meetings (S. Marks, personal communication, March 29, 2023). In Spring 2023, OPRA leadership rallied its members to provide 221 written testimonies to the state budget committees and subcommittees advocating for budget increases on behalf of DODD and OOD (C. Touvelle, personal communication, July 3, 2023). OPRA leadership continues to explore opportunities to provide a symbiotic positive influence on Ohio’s intellectual and developmental disabilities community and VR industry.

OPRA is a legislative resource for many providers. With roughly 44% of VR establishments having fewer than 20 employees (Barnes Reports, 2022, p. 8), new entrants to the market are likely very small or single-owner, single-operated. Thus, the need to outsource legislative advocacy or be a part of a more prominent advocacy association is critical. OPRA's role in the VR industry is visually depicted in Figure 1, highlighting the relationship of the OPRA trade association to its stakeholders.



**Figure 1.** *OPRA's Role in the VR Industry*

### Problem Description

OPRA leadership is looking for ways to increase its value to member agencies by positioning itself as an organization that eases or resolves VR industry problems. OPRA has identified a problem regarding the CESP qualification as an opportunity to address member agency concerns and increase the value of an OPRA membership to member agencies. OPRA leadership notes that while a problem exists, the lack of information surrounding the problem is stifling due to the many complex nuances of the situation.

### Problem Scenario

Employment specialists are crucial to increasing employment equality (Friedman & Rizzolo, 2020). Research shows the need for employment specialist qualifications, but there are no federal initiatives to implement a standard in training or certifying employment professionals (Riesen et al., 2022). Thus, states are left to implement unique quality standards for employment specialists.

One credential used by some states is the certified employment specialist professional. The CESP credential was created in 2011 (Novak et al., 2014). The CESP credential evaluates expertise in

employment services through work experience, education, and examination (Riesen et al., 2022). In 2017, OOD adopted the CESP as a requirement for employment specialists to provide supported employment job development services (Opportunities for Ohioans with Disabilities Agency, 2017). This service includes resume development, interviewing practice, job leads, application help, and transportation to and from interviews to a subset of individuals with disabilities. This service is critical for individuals with disabilities to become employed. Unfortunately, a side effect of the current labor market and OOD's credential choice is a shortage of employment specialists with a CESP (Opportunities for Ohioans with Disabilities Agency, 2022b). Disabled individuals needing this crucial service sit on wait lists while employers are unable to fill open positions.

Poignantly, while these individuals with disabilities await a CESP employment specialist, other disabled individuals receive job development services from employment specialists without the CESP. OOD distinguishes a difference in service between supported employment job development and job development. A person with a disability qualifies for one of the services or the other and cannot be readily switched. While both services provide similar job assistance services, one requires the employment specialist to hold a CESP credential while the other does not. The effect is that individuals with a particular disability must wait their turn while other disabled individuals find work.

OPRA leadership knows that many of its members who provide VR services need help to meet the state CESP requirement. OPRA leadership believes that to maintain and grow its membership base, it must remain relevant to its stakeholders and find solutions to issues important to the industry. During the COVID-19 pandemic, OPRA was a resource for personal protective equipment, an informer on ever-changing state policies and orders, and an advocate for relief to assist providers in getting through the crisis and the following years of recovery. As this crisis has wound down, OPRA leadership has needed to seek other ways of remaining relevant to members and the industry and continue as a self-described leading trade association. OPRA leadership does this by training members, advocating on behalf of members to state agencies, and providing informational resources.

OPRA leadership understands that being a primary resource of quality employment specialist best practices, offering training and information that achieves the best practice, and advocating for the state to adopt such practices not only align with OPRA's strategic plan but also address a pain point in the industry from the perspective of OPRA's members, the state agency, and, most of all, the individuals with disabilities. OPRA leadership wants to be a part of creating a solution to this problem in the industry. OPRA leadership has identified the state-required CESP credential as an opportunity to provide relevant information, training, and advocacy to and on behalf of its members.

While exact numbers are unknown, OOD has acknowledged that individuals with disabilities are not being served due to a shortage of employment specialists with the CESP (Opportunities for Ohioans with Disabilities Agency, 2022b). Anecdotally, member agencies have stated in OPRA committee meetings that cost, ability to pass the test, and overall workforce shortages are hindrances to employing staff with their CESP. OOD denotes in stakeholder meetings a desire to ensure quality employment specialists are utilized for employment services (J. Burns, personal communications, July 12, 2023). The CESP has researched-backed questions, but a study has yet to be conducted to show that an employment specialist with a CESP is more qualified to provide services than an employment specialist without it (T. Nelles, personal communication, July 17, 2023). In short, no federal-level employment specialist qualification exists. No evidence exists that demonstrates the CESP improves performance or, in other ways, makes an employment specialist more qualified. The underlying causes of the shortage of CESP professionals in Ohio are unknown and still being determined. OPRA leadership sees this as a critical opportunity to increase

OPRA's relevancy and value to members, OOD, and individuals with disabilities by seeking more information to help resolve the issue of individuals with disabilities being underserved in Ohio.

## **Discovery and Identification of the Problem**

OPRA leadership has identified a need for more knowledge about quality measures for employment specialists in terms of determining what the quality measure should be and implementing the measure. OOD has instituted a mandatory CESP credential to provide supported employment service and establish a quality baseline for employment specialists. However, evidence does not exist whether the CESP positively impacts employment outcomes for individuals with disabilities. Member agencies need to be able to employ more CESP-credentialed employees. Data-backed evidence does not exist as to why this shortage exists. However, OPRA leadership notes that members express concerns about the difficulty in passing the exam and staff turnover as possible contributing factors. In the meantime, individuals with disabilities needing supported employment are being added to wait lists across Ohio (Opportunities for Ohioans with Disabilities Agency, 2022b), barring them from actively participating in the workforce.

OPRA leadership has monitored the effect of the OOD mandate for the CESP credential since it first appeared in the 2017 VR Manual (S. Mark, personal communication, March 29, 2023). This credential mandate and commitment to employment specialist qualifications were reaffirmed in enacting the 2019 and 2022 VR Manual (Opportunities for Ohioans with Disabilities Agency, 2019; Opportunities for Ohioans with Disabilities Agency, 2022c). During 2021 and early 2022, leadership noted that a tumultuous labor market had impacted member agencies as adequate staffing and staff morale were common issues in OPRA committee meetings. During this same period, OOD referrals for job development and supported employment were substantially lower than usual. OPRA leadership advocated on behalf of its members for OOD to do more to recruit more referrals. As 2022 progressed, OOD referrals increased (S. Adrian, personal communication, July 13, 2022). As the referrals increased, OPRA leadership recognized a new pain point—a lack of credentialed staff in member agencies. OOD leadership also noted this issue and began asking community rehabilitation providers across the state to give notice if their agency had wait lists for supported employment (J. Burns, personal communication, October 12, 2022). As the data came in, OOD responded by issuing a memo allowing non-credentialed employment specialists to provide supported employment services under the mentorship of a credentialed coworker until December 1, 2023 (Opportunities for Ohioans with Disabilities Agency, 2022b). In November 2023, OOD extended this memo through September 30, 2024 (Opportunities for Ohioans with Disabilities Agency, 2023c). OPRA leadership considered this a temporary fix but believes a more permanent solution needs to be created that meets the needs of member agencies, OOD, and individuals with disabilities.

In July 2023, Ohio passed its biennium budget, significantly increasing OOD's budget (Opportunities for Ohioans with Disabilities Agency, 2023b). Director Miller of OOD announced that his agency plans to serve an additional 7,000 individuals over the next two years with the budget increase (Opportunities for Ohioans with Disabilities Agency, 2023a). OOD is also planning to add several hundred more positions to accommodate the increase in people being served (J. Burns, personal communication, May 4, 2023).

OPRA leadership believes that a more significant bottleneck in services will occur without action to address the situation (S. Marks, personal communications, February 2, 2023). OPRA leadership believes this will impact member agencies with a substantial loss in potential revenue and longer waitlists for individuals with disabilities. The issue is critical to member agencies, OOD, and people with disabilities. OPRA leadership believes that exploring the quality measure and its implementation is essential to increasing

available information on this problem. Expanding understanding in this area will improve all stakeholders' ability to create solutions to the issue. In leading the search for more knowledge, OPRA will increase its relevancy to member agencies and OOD and meet its strategic plan duty to quality services.

## **Significance of the Problem**

Left unaddressed, the shortages in credentialed staff will lead to growing waitlists for individuals with disabilities to receive supported employment services, inhibiting the OOD's ability to reach agency outcome goals, limiting member agency income potential, and constraining the workforce for employers. Member agencies strive to provide quality services to individuals with disabilities and to meet OOD requirements, but they need a smoother path to do so. Currently, a national standard of training or credentialing does not exist, and only six states utilize the CESP in some capacity for CRPs' qualifications (Riesen et al., 2022). State VR agencies need to uphold quality measures for CRPs and participate in increasing capacity for CRPs (Riesen et al., 2022).

By seeking more information on the credential issue and generating workable solutions for members and OOD, OPRA leadership elevates the agency's relevance to the parties involved and the industry while simultaneously helping individuals with disabilities gain community employment more expediently. Additionally, OPRA leadership meets its commitment in its strategic plan to address provider quality and state quality best practices.

Beyond OPRA, additional knowledge and understanding of the CESP dilemma allows member agencies and all CRPs throughout Ohio to develop their plans and methods to address the problem of quality staff and capacity to provide services. With more information, CRPs can better equip themselves to provide effective quality measures efficiently to increase capacity to provide SE services. Doing so allows CRPs to serve their business purpose and access more significant income potential.

With the increased OOD budget, OOD is targeting additional services to individuals with disabilities. OOD leadership understands this is only possible by addressing CRP capacity issues (J. Burns, personal communication, July 6, 2023). OOD strives to become a leader among state vocational rehabilitation organizations (K. Miller, personal communication, July 12, 2023). Timely, pertinent information regarding the CESP credential and insights into state use of the credential can help OOD revise its current requirements for effective and efficient implementation, allowing more individuals to be served. OOD can also serve as a resource for other states focusing on this problem.

Individuals with disabilities in Ohio stand to benefit the most from this study. With higher unemployment among those with disabilities than those without, individuals with disabilities need immediate access to vocational rehabilitation services. Increasing employment opportunities for individuals with disabilities provides greater capacity for independence and access to greater social equality.

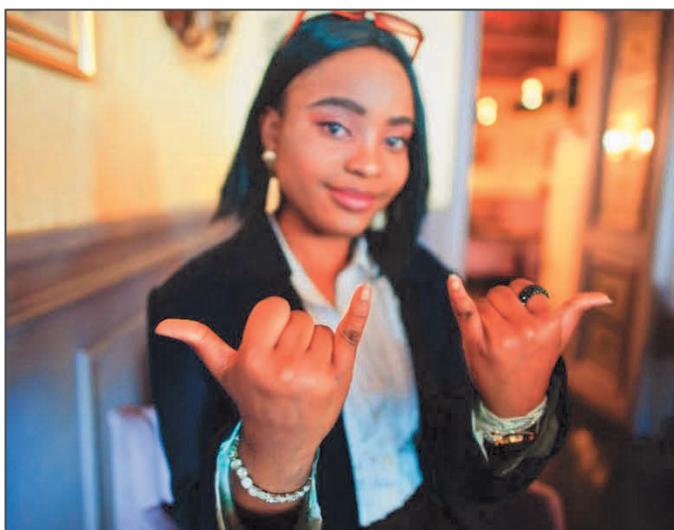
## **Broader Implications of the Problem**

Vocational rehabilitation needs federal guidance on employment specialist qualifications (Riesen et al., 2022). Training or credentialing requirements are essential when individuals needing supported employment are particularly at risk for unemployment and underemployment (Riesen et al., 2022). Current gaps in information have kept this issue to individual states to manage. As more information is made available, more states can begin to standardize the training and credentialing requirements of CRPs.

Standardization across states can elevate the requirements to the national level, keeping quality services to individuals consistent from state to state.

Employment specialists currently do not have a nationally recognized credential. While finding employment for individuals with disabilities requires diverse professional skills, employment specialists receive little distinction for their knowledge and expertise. Having a recognizable credential increases employability and credibility for employment specialists.

This study has the potential to impact employment equality for the disabled community. Self-esteem significantly increases for an individual with a disability when competitively employed (Gold et al., 2016). Burns et al. (2009) found significant correlations between community employment and improved health symptoms, hospitalization decreases, symptom remission, decline in depression, and improved social functioning. For individuals with intellectual disabilities, “the highest rates of emotional or mental health were associated with engagement in employment” (McCausland et al., 2020, p. 392). Pharmaceutical use for the chronically ill decreased for individuals with disabilities in community employment (Haider et al., 2014). Any effort that increases the ability of a person with a disability to obtain employment impacts that person’s entire life. An evidence-based best practice in effectively qualifying employment specialists that can be efficiently implemented ensures a positive impact on numerous lives of those with a disability.



*Note. From Young Deaf-Mute African American Woman Using Sign Language [Photograph], by ASphotofamily, n.d., Freepik.*

Globally, employment for individuals with disabilities is an issue many countries combat. Whether countries use supported employment models, anti-discrimination policies, or quota systems similar to affirmative action, those with disabilities remain unemployed and underemployed at higher rates than their non-disabled peers (Iwanaga et al., 2021). Employment specialists are crucial to increasing employment equality (Friedman & Rizzolo, 2020). More insights into effective quality measures for employment specialists allow other countries opportunities to increase employment equality.

## **Purpose of the Project**

OPRA leadership is committed to quality measures in the industry and has incorporated its focus on state quality measures and best practices into its strategic plan. OPRA leadership recognizes that individuals with disabilities are underserved by the OOD measures requiring a CESP.

This project explores employment specialist quality measures that can be efficiently implemented by both OOD and member agencies. This exploratory research examined the following elements:

- Employment specialist qualifications and identify trends in employment outcomes

- Interview member agencies to discover patterns in CESP pass rates, the most significant barriers to passing CESP, other themes in implementing provider qualifications
- Explore other states' employment service provider quality measures and implementation

This study details the interrelated aspects of the problem and identifies potential solutions.

## Significance of the Project

This project provides the necessary information for OPRA leadership to meet various components of its strategic plan and meet the recognized needs of OPRA's stakeholders. This study impacts OPRA's relevance to its stakeholders because OPRA leadership is at the forefront of state and national issues. The overall impact of this study is continued momentum toward employment equality for individuals with disabilities.

When individuals with disabilities cannot be gainfully employed, society pays the price. There are currently gaps in research on measures of quality for employment specialists. This study begins to fill these gaps using one state as an example. This exploratory study adds knowledge to this issue and directs the focus of future research areas. OPRA leadership can utilize this new information to set itself, member agencies, and OOD apart as leaders in the industry, driving the change for employment specialist qualifications and utilizing a symbiotic method that incorporates the needs of CRPs, state vocational rehabilitation agencies, and individuals with disabilities.

## Definitions of Key Terms

*A community rehabilitation provider (CRP)* is a private organization that assists individuals with disabilities to find work in the community instead of in a sheltered environment.

*Employment outcomes* are the various aspects of community jobs that are found for individuals with disabilities and may include wages, hours, benefits, etc.

*An employment specialist* is a professional who works with individuals with disabilities in groups or one-on-one to help them find community employment.

*Job development* is a service that prepares individuals for the job search process through resume development and interview skills training, identifies job opportunities, and matches individual capabilities to employer needs.

*Member agency* is an organization that is a member of a trade association.

*Placements* occur when a community employer hires an individual with a disability.

*State VR agency* is the state agency responsible for administering VR services or funding for VR services to individuals with all types of disabilities.

*Supported employment* is a subset of the job development service reserved for individuals with the most significant disabilities who require ongoing employment support after securing community employment.

*Vocational rehabilitation* is the all-encompassing field of helping individuals with disabilities obtain employment.

## Summary

The current requirement of the CESP to provide supported employment services in Ohio has created a barrier to employment for individuals with disabilities. OPRA leadership are committed to providing relevant advocacy and information to stakeholders. They are compelled by its strategic plan to explore quality measures and state best practices surrounding quality. The following section includes an exploration of the underlying factors and contributors to the problem and suitability of current CRP requirements.

## SECTION 2: DIAGNOSING THE PROBLEM



*Note. From Man With Down Syndrome Working in Supermarket [Photograph], by Kali9, n.d., Getty Images Signature.*

This section includes an analysis of the environment and industry within which the Ohio Providers Resource Association operates. Due to the dual nature of operations within the trade association industry and the vocational rehabilitation industry, both areas are examined to fully appreciate the needs and challenges facing OPRA leadership and the interdependent nature of trade association operations. The OPRA organization is then analyzed using multiple models. With a greater understanding of the environment, industries, and organization, the problem facing OPRA is presented with a problem statement, overarching question, and guiding research questions.

### Presenting Problem

OPRA leadership desires to add value to its members by staying relevant and on the frontline of concerns with member agencies, state executive agencies, and services for individuals with disabilities. This desire is driven by OPRA's four-point core purpose: community, advocacy, information, and resources (S. Marks, personal communication, March 29, 2023). The top two reasons members leave associations throughout the United States are lack of value and disengagement (Higher Logic, 2022). Additionally, in 2022, association members across the United States ranked certifications and industry news as two of the top three activities that created the most value (Higher Logic, 2022).

OPRA leadership seeks out topics of member interest through regular meetings with their member agencies and focus group meetings with executive state agencies. OPRA leadership has noted that service provider qualifications are a growing concern across multiple services. Accordingly, OPRA leadership incorporated this concern into its most recent strategic plan as an area to explore promising practices.

The Opportunities for Ohioans with disabilities agency guidelines state that supported employment services require an employment specialist with a certified employment specialist professional credential (Opportunities for Ohioans with Disabilities Agency, 2022c). OPRA leadership notes an emerging concern regarding a need for more employment specialists holding CESP to provide supported employment services. Anecdotally, community rehabilitation providers state that their ability to provide staff with this credential is hindered by a combination of the required years of work experience and employee turnover. OOD echoes this anecdotal evidence. In December 2022, OOD sent out a memo allowing employment specialists without a CESP to provide Supported Employment Job Development under the mentorship of a coworker who held a CESP, citing turnover concerns as a reason for the shortage in employment specialists with a CESP (Opportunities for Ohioans with Disabilities Agency, 2022b). Individuals needing supported employment services are currently on waitlists throughout Ohio (Opportunities for Ohioans with Disabilities Agency, 2022b), delaying their ability to achieve employment, earn income, and attain social equity. OPRA leadership is aware of differences among states regarding requirements for training, education, and other qualifications. Without a national standard or best practice, OPRA leadership understands that more information is needed on evidence-based employment specialist qualifications and implementation methods.

OPRA leadership asserts that quality measures and best practices are a focus of their external strategic plan (S. Marks, personal communication, March 29, 2023). OPRA leadership believe that being a resource of information aligns with their core values and strategic plan directives and plays a significant role in addressing the shortage of CESP employment specialists.

## **Environmental At-A-Glance**

OPRA is a trade association operating within the VR industry in Ohio. Thus, OPRA leadership must thoroughly understand the various aspects of the VR industry environment to be viewed as a leader and as a credible source of information and resources. The environmental scan provides information on challenges faced by individuals with disabilities, the tone set by Ohio's leaders, and recent changes in the use of technology, among other factors. Understanding the environment is critical to understanding norms and expectations in the industry.

A STEEPLE analysis is utilized to assess the environment due to its organized approach to viewing external factors (Nicholas, n.d.). This analysis looks at the VR industry environment from several angles to provide a comprehensive overview of the various influences. The STEEPLE analysis includes factors that the organization cannot control but impact organization decisions (Nicholas, n.d.).

## **Social Climate**

The U.S. Bureau of Labor Statistics estimated in 2019 that 69.1% of individuals with disabilities were unemployed across the United States, and 7.9% were actively seeking employment (Tribbie et al., 2021, p. 20). Ohio's disability population ranks sixth among all states and territories within the United States (Tribbie et al., 2021). In 2020, an estimated 159,627 Ohioans with disabilities sought employment, and OOD provided services to 29,396 individuals (Tribbie et al., 2021, p. iii). When Ohioans with disabilities were surveyed, respondents who had received services from OOD and respondents who potentially could receive services from OOD indicated "employer attitudes toward people with disabilities" as the number one challenge to finding a job in Ohio; however, 77.5% of potential participants in services indicated this

is a barrier where only 29.4% who had received services felt this was a challenge (Tribbie et al., 2021, p. 58).

Figures 2 and 3 compare Ohioans' education, employment, and income with and without a disability based on information gathered in 2016 (Americans with Disabilities Act Participatory Action Research Consortium, 2016).

## Economic Differences

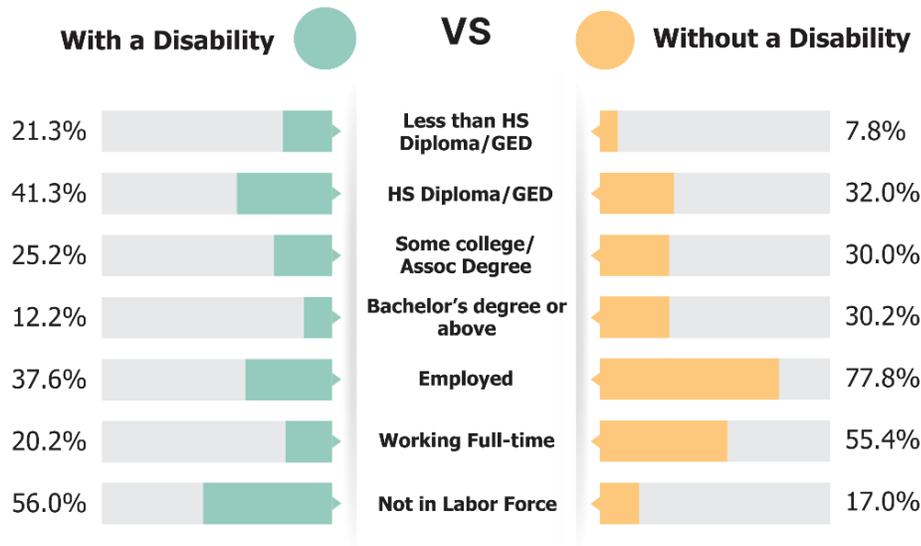


Figure 2. Education and Workforce Engagement Comparison With and Without Disabilities<sup>1</sup>

## Median Individual Income

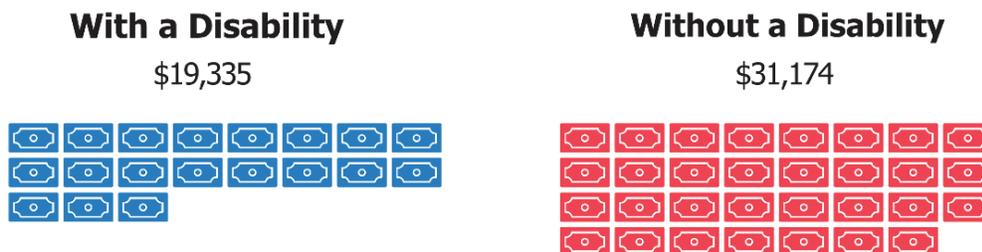


Figure 3. Comparison of Income With and Without Disabilities<sup>2</sup>

<sup>1</sup> A comparison of statistics for those with and without a disability. Adapted from *Community and Work Disparities*, by Americans with Disabilities Act Participatory Action Research Consortium, 2016, [https://centerondisability.org/ada\\_parc/utills/indicators.php?id=18&palette=3](https://centerondisability.org/ada_parc/utills/indicators.php?id=18&palette=3).

<sup>2</sup> Ibid.

Individuals with disabilities in Ohio are at a significant economic disadvantage. Ohioans with a disability are more likely not to have a high school diploma or general education development (GED) test. Those with disabilities are less likely to attend college. Ohioans with disabilities are less likely to participate in the workforce and less likely to work full-time.

## Technology

On April 4, 2020, OOD endorsed virtual vocational rehabilitation services in response to the COVID-19 pandemic and ensuing business shutdowns (Opportunities for Ohioans with Disabilities Agency, 2020). CRPs incorporate various technology, including virtual meeting software such as Zoom or Microsoft Teams, texts, smartphones, and smartwatches to aid in delivering services. Employers rely more on technology as more have switched to online applications, virtual interviews, and work-from-home or hybrid positions. OOD incorporated a new service, Setup for Technology Access Readiness Training (START Up), on June 1, 2021, to increase individuals' access to technology (Opportunities for Ohioans with Disabilities Agency, 2021).

## Economy

In May 2023, Ohio's overall unemployment rate was 3.6%, indicating a record low from 1976 (Ohio Legislative Services Commission, 2023, p. 11). The labor force participation rate was 1.5% lower in May 2023 than in January 2020 (Ohio Legislative Services Commission, 2023, p. 3). Job openings outpaced the number of unemployed for much of the first part of 2023 (Ohio Legislative Services Commission, 2023). The combination of these three components establishes just how tight Ohio's current labor market is.

In May 2023, the national Consumer Price Index for all urban consumers (CPI-U) had risen 4% from the prior year (Ohio Legislative Services Commission, 2023, p. 12). The CPI-U is predicted to be 6.3% overall for 2023, 3.1% for 2024, and 2.4% for 2025. (Ohio Legislative Services Commission, 2023, p. 18). Ohio's personal income is projected to grow 5.3% in 2023, 4.4% in 2024, and 3.7% in 2025 (Ohio Legislative Services Commission, 2023, p. 19). Employers, including CRPs, face rising costs amidst the hardships of maintaining their workforce.

## Environment

John Connelly was the executive director of OOD, known then as the administrator of the Rehabilitation Services Commission (RSC) from May 2001 to July 2009 (The Columbus Dispatch, 2008, 2009b-). His leadership was rife with lawsuits, accusations of mismanagement, and low morale (The Columbus Dispatch, 2009a-a). Connelly disgracefully lost his job when an addition to the transportation budget changed the position from commission-appointed to governor-appointed, and the governor immediately acted upon the new authority once the budget passed (The Columbus Dispatch, 2009a, 2009b-a). Michael Rench was appointed by Governor Strickland in July 2009 to the job but retired shortly later in January 2011, when Governor Kasich became the newly instated Governor of Ohio (The Columbus Dispatch, 2010). Kevin Miller has been leading OOD since he was appointed by Governor Kasich in January 2011 (Opportunities for Ohioans with Disabilities Agency, 2022a). Having three executive directors within two years caused turmoil in the industry and much turnover in OOD. Executive Director Miller brought his changes to the industry, replacing a free or open market system with an agency-controlled fee schedule (Register of Ohio, 2012). Miller also changed the name from RSC to OOD in 2013 (Ohio Legislative Services Commission, 2013).

Since 2013, only minor changes have been made within the VR environment in Ohio. Services have been added or deleted, and fee schedules have been modified. OOD has fluctuated its targeted population slightly in terms of need and funding. Governor DeWine reappointed Miller in January 2019 (Nisonger Center, n.d.) and again in January 2023 (Opportunities for Ohioans with Disabilities Agency, 2022a). Consistent leadership in Ohio's VR agency allows for predictability and stability within the industry.

## Politics

Within days of being sworn in as Governor of Ohio, Governor DeWine signed an Executive Order 2019-03D, *Establishing Ohio as a Disability Inclusion State and Model Employer of Individuals with Disabilities* (Exec. Order No. 2019-03D, 2019). Governor DeWine reinforced his commitment to making Ohio disability-friendly in the 2024–2025 state budget with historic financial investments into the state VR agency, the state mental health agency, and the state DODD agency (Office of Budget and Management, 2023). While the vote for the overall budget was split by party, support for increasing funding to OOD and DODD had bipartisan support (P. Moore, personal communication, July 7, 2023). Governor DeWine also visits local employers that hire individuals with disabilities to bring awareness to a viable labor resource (Schrock, 2023). The Accessible Ohio Initiative continues Governor DeWine's efforts by promoting accessibility and disability inclusion throughout Ohio (Ohio Association of Medical Equipment Services, 2023). The Ohio Association of Medical Equipment Services, a trade association comprised of medical home equipment providers, credits Governor DeWine and the Accessible Ohio Initiative as positioning Ohio as a "global leader in public accessibility" (Ohio Association of Medical Equipment Services, 2023, Title). Those in the industry have interpreted Governor DeWine's leadership and continuous efforts to keep inclusion for individuals with disabilities in the news and in lawmakers' minds as contributing to an environment that accepts individuals with disabilities as a natural part of the workforce.

At the federal level, Ohio's Senator Sherrod Brown introduced a bipartisan bill, the *SSI Savings Penalty Elimination Act*, to increase the resource limit placed on individuals receiving Supplemental Security Income from \$2,000 to \$10,000 for individuals and to include a measure for continuing to adjust the resource limit for inflation (SSI Savings Penalty Elimination Act, 2022, para. 2). While the bill has never been introduced for a vote, Senator Brown's recognition of a critical barrier to individuals with disabilities provides further evidence of the desire of state leadership to push for equality for individuals with disabilities.

In 2007, Ohio ranked 48<sup>th</sup> on the American Network of Community Options and Resources (ANCOR) Foundation's rankings of state policies and programs on employment and community living for individuals with intellectual and developmental disabilities (Luechtefeld, 2019, para. 1). In 2019, Ohio jumped to eighth place, partially because 23% of Ohio's intellectual and developmental disabilities population was competitively employed, putting Ohio above the national average of 19% (Luechtefeld, 2019, para. 3). The coordinated efforts of the state executive and legislative leadership continue to affect real change for individuals with disabilities in Ohio.

## Law

The last significant federal change to the vocational rehabilitation industry occurred with the passing of the Workforce Innovation and Opportunity Act (WIOA) in 2014 (U.S. Department of Labor, n.d.). Significant changes included aligning vocational rehabilitation with other workforce development programs, such as JobCorp and dislocated worker programs (U.S. Department of Labor, 2016). WIOA also focuses on

competitive and integrated employment, limiting subminimum wages, and expanding services to young adults to improve their transition into working adults (U.S. Department of Labor, 2016). WIOA also defined supported employment as an individual with a most significant disability achieving competitive, integrated employment in line with their abilities and interests, which includes long-term supportive services (Rehabilitation Services Administration, 2017).

The Rehabilitation Services Administration (RSA) supports and oversees state vocational rehabilitation programs (Rehabilitation Services Administration, n.d.-a). In 2023, RSA provided a report to OOD indicating areas where OOD's operations need improvement, including a more methodical approach to its fee schedule and consideration of how mandated qualifications affect the availability of employment specialists (Davis et al., 2023). While these changes indicate upcoming modifications to certain areas of Ohio's vocational rehabilitation program, the changes are minor overall.

OOD requires a CESP credential to provide supported employment services per its manual for CRPs (Opportunities for Ohioans with Disabilities Agency, 2022c). As of December 1, 2022, OOD allows employment specialists without a CESP to provide services as long as they are under the mentorship of a CESP-holding co-worker (Opportunities for Ohioans with Disabilities Agency, 2022b). OOD can modify its qualification for supported employment services because a national standard does not exist, nor does a federal regulation dictate a qualification or implementation of a qualification (Riesen et al., 2022). As such, in a survey of 48 state vocational rehabilitation agencies, 10 had no qualification requirements for supported employment services (Riesen et al., 2022, Table 1). Of the remaining 38 states, some states had multiple options for qualification (Riesen et al., 2022). Only six states utilize the CESP in any capacity as a measure of qualification for supported employment services (Riesen et al., 2022, P. 22). The remaining qualifiers include Association of Community Rehabilitation Educators (ACRE) training, a college degree of varying levels, Commission on Accreditation of Rehabilitation Facilities (CARF) accreditation, industry-related ongoing training, and other various requirements (Riesen et al., 2022).

The method by which state VR agencies implement a CESP qualification varies dramatically. Some states provide an increased payment for services when provided by a CESP (T. Nelles, personal communication, July 17, 2023). A state may also provide financial incentives to employment specialists for obtaining or renewing their CESP (T. Nelles, personal communication, July 17, 2023). Again, without any federal guidance or research, state vocational rehabilitation agencies are left to their own devices.

## Ethics

The disparate education, employment, and income conditions in which individuals with disabilities live highlight the continued ethical need for equality for them. Ohio's leadership has committed to inclusion for individuals with disabilities (Exec. Order No. 2019-03D, 2019). To attain employment equality, OOD and CRPs require seamless working relationships for vocational rehabilitation services to reach individuals effectively and efficiently.

The VR environment illustrates a landscape of dichotomies. While Ohio leadership is supportive of vocational rehabilitation, individuals with disabilities are still more likely to be less educated, under-employed, and living in poverty. At a time when job openings exceed those on unemployment, employer attitudes are believed to be the most significant barrier for individuals with disabilities seeking employment. While prioritizing the livelihoods of individuals with disabilities has bipartisan support at the state and national levels, other political factors hinder true VR advancement.

## Industry At-A-Glance

OPRA is a nonprofit trade association comprised of member organizations that provide facility, home, community, and employment services to individuals with disabilities in Ohio. The North American Industry Classification System (NAICS) classifies it as a Business Association – 813910. This industry advocates for business interests, researches new services or products, supports quality standards, and lobbies elected and appointed officials (North American Industry Classification System Association, n.d.-a). Additionally, trade associations provide industry and regulatory information to businesses, improve businesses' proficiency to handle industry changes, and enhance understanding of emerging changes within the industry (Betton et al., 2019). In 2022, the primary focus of trade associations involved advocacy with government and regulatory agencies (McKinley Advisors, 2022). Other trends in the trade association industry include increasing membership value, improving the organizational strength of the individual trade association, changing business models to become more financially stable, and increasing diversity (McKinley Advisors, 2022). Associations continue to increase their use of technology and in-person meetings and events (McKinley Advisors, 2021). Concerns within this industry include diversifying revenue streams and remodeling the delivery of services such as conferences, communications, and education (McKinley Advisors, 2021).

## Competitive Environment

Porter's Five Forces originated in 1979 when Michael Porter identified the forces that assessed the appeal of a particular industry (Isabelle et al., 2020). The first four are "the threat of new entrants, the bargaining power of buyers, the bargaining power of suppliers, [and] the threat of substitute products or services" (Isabelle et al., 2020, p. 29). The threat of new entrants is assessed by looking at the potential barriers an organization faces when entering an industry, including operational aspects such as scale, differentiation, capital, distribution channels, and regulation (Zhang et al., 2020). The bargaining power of buyers considers the constructs of the market and the importance of sales to an organization within the industry (Zhang et al., 2020). The bargaining power of suppliers focuses on where the control of changes in input price and product value lies along the supply chain (Zhang et al., 2020). The threat of substitutes is measured by determining the cost of switching to a substitute and the performance of the substitution (Isabelle et al., 2020). These four forces contribute to competitive rivalry, the final force in Porter's framework (Isabelle et al., 2020). An inverse relationship exists between the strength of any of the five forces and an organization's profitability (Isabelle et al., 2020). Thus, an industry is more attractive when the strength of each of Porter's Five Forces is low.

OPRA is a trade association that operates at the state level and focuses on state-specific issues. However, OPRA leadership must know the factors that affect the trade association industry's ability to operate effectively. Porter's Five Forces is a valid approach to analyzing a trade association's business strategy because it helps identify and assess the competitive and strategic factors in the industry's climate. The five forces provide insight into the organization's ability to attract members, influence industry decisions, and achieve its strategic goals. Below is an analysis that focuses on the trade association industry at the state level in Ohio.

### *Threat of New Entrants*

Although ease of entry into an industry may seem to positively impact that industry's attractiveness, organizations prefer a low threat of new entrants when assessing industry appeal. Barriers facing new

entrants may impact an organization's ability to enter an industry entirely, or the barriers may come later and impact the organization's success. Barriers to industry entrants include the ability to scale, differentiation of services, capital required to operate effectively, distribution channels of services, and government rules and regulations.

Trade associations scale most readily through increasing memberships. However, this is limited to the number of businesses in the industry sector, geographic region, and other limiting factors confining trade association operations. Trade associations can expand into related areas to increase the number of potential members. For example, a trade association within a city may expand to a broader region, such as a collection of municipalities, a county, or the state. Alternatively, trade associations with extremely narrow focuses can broaden related interests to include more businesses.

While barriers to entry exist in this market, the services provided by any given trade association can be replicated. Relationships and funding are the key differentiators; relationships with state agencies and legislators can take significant time to build. As such, no legal protection, such as patents or copyrights, exists to bar new competitors from mimicking services and advocacy efforts.

The most significant barrier to entry is recruiting adequate memberships to fund the trade association. A trade association needs sufficient members to function (Boleat, 2011). See Table 1 for the revenue of some of Ohio's trade associations.

Revenue of Various Trade Associations	
Trade Association	Revenue in USD\$
Greater Cleveland Partnership	14,402,868
Ohio Chamber of Commerce	7,246,853
Employers Resource Association	2,898,962
Ohio Restaurant Association	2,138,506
Ohio Trucking Association	1,376,134

**Table 1.** Revenue of Various Trade Associations<sup>3</sup>

Direct services to members are disseminated through publications, meetings, conferences, and training. These services are increasingly digital, such as electronic newsletters and virtual meetings (McKinley Advisors, 2021). They allow members to network, increase their understanding of the industry, and stay abreast of changes.

Through advocacy efforts and lobbying, indirect services are provided to legislative members and executive agencies. These services can include meetings with specific individuals within the legislative or executive branches, participation in committee meetings, and oral or written testimonies.

Many trade associations directly employ or contract with lobbyists. Ohio defines a lobbyist as “a person who is compensated to advocate the interests of another before Ohio’s legislative and executive branches” (Joint Legislative Ethics Committee, 2014, p. 5). New entrants must register with the Office of the

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<sup>3</sup> From CausalQ, n.d., *Organization search*.  
[https://www..com/search/organizations/o\\_56fa1d8dd666197f/?view=table](https://www..com/search/organizations/o_56fa1d8dd666197f/?view=table).

Legislative Inspector General (OLIG) and have access to free training regarding lobbying ethics and regulations from this office (Joint Legislative Ethics Committee, 2014). Lobbying laws differ between the legislature and executive agencies (Joint Legislative Ethics Committee, 2014). As of 2014, Ohio had 294 executive agencies (Joint Legislative Ethics Committee, 2014, pp. 89–91). Ohio’s General Assembly currently contains 33 members in the Senate and 99 members in the House of Representatives (The Ohio Legislature, n.d., para. 3). All lobbyists must file Activity and Expenditure Reports and Financial Transaction Statements in accordance with the OLIG where these documents remain as public record indefinitely (Joint Legislative Ethics Committee, 2014). The legal barriers to starting a trade association are relatively small.

### ***Buyer Power***

For this analysis, a *buyer* is defined as an organization that could be a trade association member. There is a finite number of buyers. The cost to switch from one trade association to another or drop membership altogether is relatively low. The trade association’s dependency on member dues is substantially high. However, there is very little ability for effective backward integration, as businesses typically do not have the time and expertise to develop ongoing rapport with state legislators. While trade associations provide a necessary service to organizations, buyers have more power.

### ***Supplier Power***

For this analysis, a supplier is defined as a state executive agency or legislator. There are few suppliers. Suppliers can switch their attention and priority to other industries without any cost. Trade associations provide in-depth knowledge of the intricate workings of industries and can facilitate effective partnerships with state agencies and businesses. While trade associations benefit suppliers, suppliers overwhelmingly hold more power.

### ***Threat of Substitutes***

Professional associations are a substitute for trade associations. Instead of representing a collection of organizations, professional organizations advocate and provide information to individuals and professionals in a particular industry. For example, the Association for People Supporting Employment First Ohio (APSE Ohio; n.d.) is a state professional association that provides industry information and education to professionals providing vocational rehabilitation services.

Another substitute for trade associations is businesses providing their advocacy directly to lawmakers. This requires employing staff who understand lobbying regulations and can build relationships with lawmakers and executive agencies. Many organizations refrain from doing this due to the time involved in developing effective relationships, the disruption of staffing changes, and the knowledge required to follow regulations (McKinley Advisors, 2022).

### ***Competitive Rivalry***

Competitive rivalry is the summation of the other four forces and other contributing factors of rivalry. These factors include the “number of competitors, quality differences, other differences, switching costs, [and] customer loyalty” (Isabelle et al., 2020, p. 30). Many state-level trade associations are operating within Ohio (CauseIQ, n.d.). However, each trade association has developed a specific focused niche, making the industry highly differentiated. This differentiation also leans heavily into customer loyalty as

organizations typically join the trade association that most aligns with their business needs. Switching costs are relatively low as an agency can switch membership fees from one trade association to another. Despite the number of competitors being high and switching costs being low, the industry's characteristic differentiation keeps competitive rivalry low.

### ***Porter's Five Forces Conclusion***

As a trade association, OPRA faces a low threat of new entrants, high buyer power, high supplier power, low threat of substitutes, and low competitive rivalry. OPRA leadership can leverage its value to member agencies to reduce buyer power. OPRA leadership's ability to provide indispensable services to members strengthens its position in the bargaining relationship with buyers. Similarly, OPRA leadership can reduce the bargaining power of suppliers by providing vital industry information to legislative representatives and executive agencies.

### **Vocational Rehabilitation Industry information**

While OPRA is a trade association, the industry within which OPRA operates is Ohio's vocational rehabilitation industry. Vocational rehabilitation is represented by NAICS code 624310 and includes competitive integrated employment, sheltered workshops, vocational habilitation, and job training programs (North American Industry Classification System Association, n.d.-b). For OPRA to operate successfully, it is crucial that OPRA leadership thoroughly understand the inner workings of vocational rehabilitation in Ohio.

In Ohio, individuals with disabilities apply for services at OOD. Once approved for services, the individual meets with an OOD vocational rehabilitation counselor, and together, they decide the most appropriate services for the individual. From there, the individual is referred to as a community rehabilitation provider that offers the services that the individual needs. While state agencies may provide some services, typically, agencies outsource vocational rehabilitation services to CRPs (Lukyanova et al., 2015). The CRP provides the services according to Ohio's CRP VR [Vocational Rehabilitation] Manual and then invoices the state agency. Many services are paid for using an outcomes-based fee structure, where CRPs only receive payment when individuals obtain specific achievements within their services (Becker et al., 2022)

There are 159 agencies registered with OOD to provide employment services to individuals with disabilities (Opportunities for Ohioans with Disabilities Agency, n.d.-b). The number of CRPs providing services in a geographic location varies throughout the state. CRPs compete for referrals within the geographic regions that they serve. Because of the nature of services, services provided solely by remote means are not typically viable. Thus, competition is limited by how far a company can geographically expand and the variety of services an agency offers.

Individual services are primarily undifferentiated by CRPs. OOD's "VR Provider Manual" specifies how each vocational rehabilitation service will be referred, performed, and invoiced and how much CRPs will be paid (Opportunities for Ohioans with Disabilities Agency, 2022c). CRPs have high fixed costs to maintain regulatory and technology compliance. Vocational rehabilitation counselors have negligible switching costs when they move referrals from one CRP to another. New CRPs can struggle to gain referrals if individuals with disabilities are unfamiliar with their business name. OOD can also integrate backward and provide some services, such as work incentives coordination and job development, using internal staff.

Individuals with disabilities do not necessarily have to use OOD services to get a job. An obvious substitute for VR services is an individual getting a job without help. CRPs and VR agencies work with more severely disabled individuals (Lukyanova et al., 2015). Participation rates in VR services can vary. For instance, 25% of the disabled workforce received services from OOD in 2017 (Tribbie et al., 2018, p. v). However, in 2020, only 18% of the disabled workforce received OOD services (Tribbie et al., 2021, p. iii).

OOD tracks the following information as measures of utilization and performance:

- Number of individuals determined to be eligible for services
- Number of rehabilitation plans written
- Number of individuals who receive services
- Number of individuals who successfully obtain and maintain employment for 90 days
- Average wage of participants' employment
- Average hours of participants' employment

The data for the past three program years is listed in Table 2.

OOD Utilization and Performance			
Metric	2021	2022	2023
Eligibility	13,904	15,832	17,886
Plans Written	10,765	12,080	13,658
Eligible and Served	34,193	34,236	36,899
Rehabilitations	5,659	5,289	5,035
Average Wage	\$12.35	\$13.86	\$15.70
Average Hours	26.8	26.8	27.4

**Table 2.** OOD Utilization and Performance<sup>4</sup>

## Organizational At-A-Glance

OPRA leadership believes that its fundamental customer is an individual with a developmental disability (Ohio Providers Resource Association, n.d.-a). OPRA leadership keeps this essential customer at the forefront while providing services to stakeholders, namely member agencies, state executive agencies, and Ohio legislative members. This designation of priority in customers is reflected throughout OPRA's organizational and operational composition.

## Mission

To support and provide advocacy for providers to ensure the availability of high-quality programs, services, and funding adequate to support the individuals with intellectual and developmental disabilities they serve to achieve a life of increasing independence, productivity, and integration (Ohio Providers Resource Association, n.d.-a).

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<sup>4</sup> Annual data for 2021 and 2022 were provided by S. Pugh via personal communications on January 11, 2023. Annual data for 2023 was provided by S. Andrian via personal communication on October 25, 2023.

## Culture

OPRA leadership demonstrates a commitment to the agency's mission through the anchor statement, core strategies, and guiding principles. The overall commonalities reveal a consistent message of dedication to providers and individuals with intellectual and developmental disabilities. OPRA leadership's usage of an anchor statement to continuously remind and check activities to ensure they align with the organization's purpose exhibits a dedication to the agency's overall goal and purpose.

### *Anchor Statement*

Ohio's providers are focused on supporting the success of the people we serve (S. Marks, personal communication, March 29, 2023).

### *Core Strategies*

OPRA leadership utilizes three core values to create guiding principles that drive OPRA's external strategic plan.

- To work with legislators, administrative agencies, and other stakeholder groups, including families and community-based organizations, to shape public policies that deeply affect people with developmental disabilities
- To protect the right of individuals and families to choose where and how their loved ones are cared for and supported, and our highest priority is providing and sustaining high-quality services for all Ohioans with disabilities
- To promote the creation of a statewide structure that is rational, equitable, fair, and effective (Ohio Providers Resource Association, n.d.-a)

### *Guiding Principles*

1. We believe the primary focus of our work is the positive and supportive relationship between front-line professionals and the people they support.
2. We believe providers should be supported and trusted to support people with developmental disabilities and operate effective and successful organizations.
3. We believe providers must be sufficiently compensated to deliver essential services to meet the needs of the people they support in an ever-evolving society and system.
4. We believe all services currently provided across the spectrum of services should be recognized as crucial to each and every person we serve (S. Marks, personal communication, March 29, 2023).

## Strategic Plan

Examining the OPRA 2023 strategic plan illustrates an application of Simon Sinek's Golden Circle model (Sinek, 2009). The Golden Circle is a three-ring design that puts the purpose of the organization in the very center of the circle, the method of performing actions forms in the next ring, and specific actions make up the outer ring (Cavalcante et al., 2021). Sinek uses the labels of why, how, and what on the concentric circles to form the Golden Circle (Cavalcante et al., 2021). Using this model, OPRA leadership demonstrates

its commitment to keeping its purpose at the forefront of every decision made, followed by how it acts and, finally, the actions themselves.

OPRA’s 2023 strategic plan identifies community, advocacy, information, and resources as the agency’s purpose and core values. The strategic plan defines OPRA’s methods of achieving its goals such as building trust, creating relationships, valuing the spectrum of services, and maintaining fairness and sustainability. Finally, the strategic plan specifies current key action steps as follows: member hiring, member retention and culture, system barriers, worker wage rates, budget advocacy, simplified billing, increase collaboration, OPRA must step up, resources to value spectrum, the provider certification rule, continued pandemic simplification, and exploring quality (S. Marks, personal communication, March 29, 2023).

OPRA leadership’s overarching purpose, method, and steps to secure its position as a leading, sustainable trade association in Ohio are illustrated in Figure 4.



Figure 4. 2023 Strategic Plan Framework<sup>5</sup>

<sup>5</sup> The 2023 strategic plan utilizing the Golden Circle framework from personal communication with S. Marks on March 29, 2023, adapted from *Start With Why: How Great Leaders Get Everyone on the Same Page* by S. Sinek, 2009. <https://tinyurl.com/ycxxnxb>

OPRA leadership demonstrates their commitment to their purpose in a variety of ways. OPRA leadership encourages community within its membership through service-specific committees, semi-annual state conferences, weekly member phone calls, and newsletters. Additionally, leadership encourages members to ask the member base when struggling with an agency staffing or policy issue, giving each member access to dozens of agencies handling the same issue.

OPRA leadership exhibits advocacy in working with local, state, and federal partners to advocate for member agencies and individuals with intellectual and developmental disabilities. OPRA leadership engages members in advocacy initiatives by conducting forums for members to opine on policy issues.

Using various communication methods, including virtual meetings and newsletters, OPRA leadership informs members of the latest state agency updates, pending legislation, statutory changes, and best practices.

OPRA leadership develops, compiles, and shares resources for members to navigate emerging issues, participate in political advocacy, and address industry needs. OPRA leadership has created a service provider directory, an ICF openings directory, a direct support professional (DSP) job bank, a compensation and benefits survey, and human resources policies reports as various ways to deliver resources to member agencies.

Internally, OPRA's plan focuses on growing membership, expanding OPRA training, increasing in-person member engagement, and continuing OPRA team skill development (S. Marks, personal communication, March 29, 2023).

## **Impact of Environmental Analysis**

Individuals with disabilities are at a disadvantage in the community and workforce in Ohio. OPRA meets a critical need for employment specialists to bring equity to this population through various services. OPRA's dependency on member dues is directly affected by a member or potential member's ability to pay dues. Inflation or stagnant service fees can impact a member's willingness to continue membership. OPRA is operating in a state that has made disability care a primary focus.

## **Impact of Industry Analysis**

OPRA's strategic plan and internal goals align with current trade association industry trends. OPRA leadership and employees know various aspects of the VR industry and have built a relationship with OOD that has allowed them to participate in changes. For example, OPRA has a representative serving on OOD's fee schedule committee (S. Marks, personal communication, July 27, 2023). This relationship and access to OOD leadership allow OPRA to advocate effectively for the industry.

## **McKinsey 7-S Model Analysis of the Organization**

OPRA members provide personal care and residential and community services to individuals with intellectual and developmental disabilities through intermediate care facilities, group homes, and in-home care. OPRA members also provide VR services, including vocational habilitation, adult day services, sheltered workshop employment, enclave employment, and integrated community employment services. McKinsey's 7-S Model emphasizes incorporating various organizational aspects with the internal and

external environment (Galli, 2018). This model is appropriate due to OPRA's interrelated operations with members and state officials.

## **Strategy**

OPRA leadership maintains a rolling one-year strategic plan, which is revised and approved annually by the Board of Directors. OPRA's strategic plan currently contains four external principle focuses and four goals.

Four Principles:

1. We believe the primary focus of our work is the positive and supportive relationship between front-line professionals and the people they support.
  - a. Define the professional DSP (Direct Support Professional)/front-line professionals
  - b. Provider infrastructure/business support
  - c. System barriers
  - d. Technology and the provider
2. We believe providers should be supported and trusted to support people with developmental disabilities and operate effective and successful organizations.
  - a. Provider quality
  - b. Provider in good standing
  - c. Oversight reform
3. We believe providers must be sufficiently compensated to deliver essential services to meet the needs of the people they support in an ever-evolving society and system.
  - a. Value of DSP/front-line staff
  - b. Resources needed to support DSPs/front-line staff
  - c. Leadership sustainability
  - d. Advocacy Army
4. We believe all services currently provided across the spectrum of services should be recognized as crucial to each and every person we serve.
  - a. Highlight the services across the spectrum
  - b. Promote services
  - c. Celebrate the choices available (S. Marks, personal communication, March 20, 2023)

OPRA's Goals

- Recruit new members
- Expand OPRA's training programs for members and non-members
- Expand in-person member engagement
- Develop the OPRA team's competencies (S. Marks, personal communication, March 20, 2023)

## **Structure**

OPRA is a nonprofit organization. It maintains a board of directors comprised of 26 volunteer members, of which five are officers (Ohio Providers Resource Association, n.d.-b, Board of Directors section). The OPRA Board consists of three volunteer representatives in each of its seven districts and five at-large volunteer representatives (Ohio Providers Resource Association, n.d.-b, Board of Directors section). The organization

keeps administration costs low by employing only eight full-time individuals and one part-time individual (Ohio Providers Resource Association, n.d.-c, Staff section). One of these employees serves as President and CEO, overseeing the others' duties.

OPRA leadership retains contracted services for three areas: (a) The Success Group for lobbying services, (b) a Political Action Committee (PAC) consultant, and (c) a Medicaid services consultant (S. Marks, personal communication, September 21, 2023).

OPRA's revenue in 2018 was approximately \$2.3 million, including \$1.9 million in program service revenue, \$339,000 in grants and donations, \$68,000 in investment income, and \$102,000 in government grants (Internal Revenue Service, 2018, Form 990). At the beginning and height of the COVID-19 pandemic, OPRA leadership reacted by deliberately keeping costs low and funneling additional funds into savings and investments (S. Marks, personal communication, September 21, 2023). OPRA leadership set aside funds to prepare for potential drops in memberships; however, a significant drop in membership did not transpire (S. Marks, personal communication, September 21, 2023). At this time, OPRA has gained more members and created a new channel for memberships by including a "Public Entity" membership tier (S. Marks, personal communication, September 21, 2023). The "Public Entity Membership" allows local county boards of developmental disabilities and regional councils of government access to OPRA membership (Ohio Providers Resource Association, n.d.-d). OPRA's financial position has remained stable over the past five years (S. Marks, personal communication, September 21, 2023).

## **Systems**

OPRA's Board of Directors serves as the operations governance committee. This committee oversees OPRA's operating manual, which is updated every three years. The manual establishes OPRA's districts and the staff structure. OPRA employees meet weekly to review the previous week and prepare for the upcoming week. There are no formalized work instructions; however, staff regularly update each other and collaborate on activities.

## **Skills**

OPRA leadership emphasizes field experience when hiring and seeks individuals with experience directly linked to the position's role within the company. As such, each OPRA employee has a niche set of skills that contribute to overall team effectiveness. OPRA leadership further enhances these skills by ensuring adequate ongoing training through conference attendance and other outside training opportunities. OPRA leadership adapts positions to better suit an employee's skills and promotes them from within whenever possible.

## **Staff**

OPRA employs nine individuals. Five of the employees are women, and one employee is non-Caucasian. OPRA is a flat organization, with only one employee having a supervisory role.

- The president/CEO supervises all other OPRA employees and ensures OPRA activities align with the strategic plan.
- The vice president is the liaison for the Day Array, Day Services, and Employment Services Committees and participates in workgroups with DODD and OOD.

- The chief innovation officer turns initiatives into implementation plans through collaborations and agile processes.
- The director of advocacy coordinates advocacy efforts with state and federal legislatures, monitors state and federal rule/law changes, provides Advocacy Army training, and collaborates with contract lobbyists.
- The director of residential resources is the liaison for the ICF and Residential Waiver Committees and provides technical assistance and solutions for residential providers.
- The member communications manager manages the membership database and agency website and supports the OPRA Board and OPRA Governance Committee.
- The events manager oversees OPRA's spring and fall conferences, OPRA training, special events, and OPRA PAC Fundraisers and manages OPRA's social media.
- The operations and outreach manager coordinates administrative activities and internal operations.
- An accountant provides bookkeeping services to OPRA (S. Marks, personal communication, September 21, 2023).

OPRA employees have significant previous work-related experience in the area for which they are hired. Fitting into the team's culture and personality is as important as the employee's skills. OPRA leaders carefully recruit new team members who are heavily interested in public policy. Employees meet once a week for a staff meeting to review individual topic areas and projects and review plans for the following week.

OPRA employees are accountable to each other and the President/CEO (S. Marks, personal communication, September 21, 2023). This accountability and camaraderie among each other create an environment conducive to staying engaged and motivated to do well (S. Marks, personal communication, September 21, 2023). OPRA leadership encourages employees to attend national conferences and regularly visit Washington D.C. for advocacy efforts to keep employees educated, energized, refreshed, and engaged (S. Marks, personal communication, September 21, 2023). "Ultimately, the accountability to our membership and mission is what keeps us engaged" (S. Marks, personal communication, September 21, 2023).

## **Style**

OPRA employees operate with open communication, flexibility, and collaboration among staff, members, and interested parties. Employees attend a weekly meeting to provide updates on their projects and tasks. OPRA employees are keen to stick to its community, advocacy, information, and resource-driving guidelines.

## **Shared Value**

OPRA employees have incorporated OPRA's why—community, advocacy, information, and resource—into their positions and tasks. Each employee has a distinct area of expertise, and the team capitalizes on these differences in their individual work and collaborative projects.

Although OPRA is interdependent with the trade association and VR industries, OPRA leadership manages actions effectively and efficiently in both. OPRA, as an agency, is resourcefully structured with only small areas of employee responsibility overlap, which leads to moments of collaboration and little duplication

in work. OPRA leadership emphasizes its purpose in such an extensive way that employee actions continuously align and support this purpose, allowing employees’ disparate actions to flow cohesively with the organization’s overall strategic plan.

## SWOT Analysis of the Organization

OPRA leadership must continuously balance internal and external critical factors to strategically position itself as a leading trade association and VR industry leader. An analysis of the strengths, weaknesses, opportunities, and threats (SWOT) provides a holistic perspective on the internal and external components that impact an agency’s success (David et al., 2019). See Figure 5 for OPRA’s SWOT analysis.

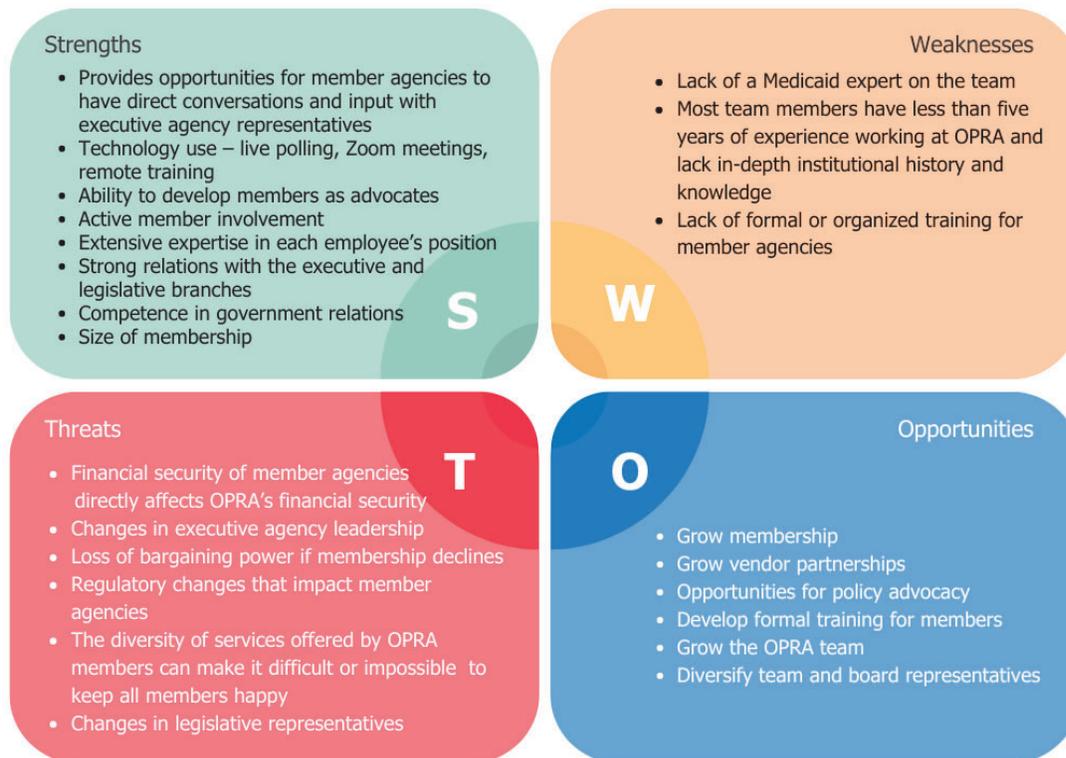


Figure 5. SWOT Analysis<sup>6</sup>

OPRA’s profound strength of a large, active membership exposes them to the greatest threat of losing memberships and thus influence. While OPRA maintains an engaged following, the leadership can more readily address member issues and influence executive agencies and legislative decisions. OPRA’s biggest opportunity is to continue growing memberships to solidify their ability to advocate for public policy that benefits member agencies and individuals with disabilities.

## Virtuous Business Model Analysis of the Organization

The Virtuous Business Model (VBM) is useful for evaluating an organization’s culture. The VBM includes the Be-Know-Do to assess an agency’s social, economic, and spiritual areas (Brooker & Boyce, 2017). OPRA

<sup>6</sup> SWOT analysis information was derived from personal communication with S. Marks on March 29, 2023.

leadership's use of the Golden Circle (Sinek, 2009) in their strategic plan and the employees' commitment to OPRA's values provide evidence of OPRA's adherence to virtue in its business operations.

An organization's culture is its "system of shared beliefs and values" (Li et al., 2021, p. 2546). An ethical organizational culture considers internal and external actions that are principled (Toro-Arias et al., 2022) and infuses this scrutiny into its system of attitudes and behaviors. The VBM is one tool for evaluating workplace culture ethicality. OPRA leadership's insightful use of Sinek's Golden Circle aligns with the VBM's Be-Know-Do frames. See Figure 6. However, OPRA leadership's recurring demonstration of commitment to service and moral principles supports the idea that OPRA functions with an ethical organizational culture.



Figure 6. Analysis of OPRA's Strategic Plan Using the VBM<sup>7</sup>

### **Be**

The VBM's standard for being is sincerity, centered, and principled (Brooker & Boyce, 2017). OPRA leadership demonstrates its commitment to being centered, sincere, and principled, with a well-defined purpose echoed throughout its mission, principles, strategic plan, and actions.

### **Know**

The VBM evaluates knowledge using the guidelines of supportive, creative, and proficient (Brooker & Boyce, 2017). OPRA staff have in-depth knowledge and understanding of the industry and their aspect of trade association operations. OPRA employees respond quickly to member questions and emerging issues. OPRA staff offer multiple channels and opportunities to brainstorm solutions to industry problems and improve processes.

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<sup>7</sup> Adapted from "Virtuous Leaders and Organizations" by M. Brooker & J. W. Boyce, 2017 (Spring), *The DeVoe Report*, <https://tinyurl.com/yfa4uzy6>.

## **Do**

The VBM's criteria for action are service, compassion, and profound (Brooker & Boyce, 2017). OPRA leadership provides quality services to its members as indicated by its strategic plan and everyday operations. Awareness of and compassion for individuals with disabilities is evidenced in the advocacy and information OPRA provides to members in weekly newsletters and monthly or bi-monthly committee meetings. OPRA leadership demonstrates a profound commitment not just to observe or call attention to concerns but also to identify solutions to problems.

## **Value of Study**

Exploring quality measures for employment specialists is valuable to many organizations within VR. While the various business associations may each focus on a different type of disability, employment specialists are a critical component of employment for an individual with any disability. CRPs currently need this vital information, which affects employee hiring, training, and performance. This study is valuable to professional associations, enabling them to advocate for better services. Individuals with disabilities benefit the most as improving the quality of the employment specialist increases their employment opportunities (Friedman & Rizzolo, 2020).

## **Diagnosing the Problem**

OPRA leadership desires effective quality standards that can be implemented efficiently for Ohio employment specialists. The current situation is causing frustration with CRPs who need more staff with a CESP. The shortage of employment specialists with a CESP is leading to CRP-created waitlists and CRPs refusing referrals from OOD or putting referrals on hold until the CRP can take referrals (Opportunities for Ohioans with Disabilities Agency, 2022b). OOD wants to avoid this service bottleneck (Opportunities for Ohioans with Disabilities Agency, 2022b). The shortage is keeping individuals with disabilities from a job market currently filled with opportunities. Employers are also affected because potential employees cannot fill the needed staffing roles. OPRA leadership understands that the current lack of information adds to the difficulty in providing advocacy or being a resource for its members.

This problem is particularly relevant as OOD revisits staff qualifications (J. Burns, personal communication, July 12, 2023). The current modification to allow all employees to provide services if the CRP has at least one CESP-credentialed staff expires December 1, 2023. Additionally, OOD will serve an additional 7,000 individuals in the next year (Opportunities for Ohioans with Disabilities Agency, 2023a, para. 4). OPRA leadership recognizes a unique, strategic opportunity to provide information to members and OOD and guide conversations to a solution that benefits all stakeholders.

Analyses of the environment, industry, and organization indicate a collective desire for individuals with disabilities to have access to employment opportunities. Clarifying best practices for employment specialist qualifications is equally desired. To that end, OPRA leadership proffered the following questions.

OPRA leadership identify four questions:

1. Does the CESP provider find better employment outcomes for individuals with disabilities than a provider without a CESP?
2. What are the biggest barriers to agencies getting their staff to obtain the CESP credential?

### 3. How can OPRA support member agencies having more CESP credentialed staff?

What are other models for using the CESP or other credentials that have been adopted by other states, and have they been successful?

## Known Facts Associated With the Problem

OPRA's membership dues comprise over 50% of OPRA's total revenue (Internal Revenue Service, 2018, Form 990). Increasing member value and engagement are two of the most impactful actions to retain members (Higher Logic, 2022). Being a resource for certifications and industry news are two of the most desired methods to increase membership value (Higher Logic, 2022). Increasing member value is a critical trend in the trade association industry (McKinley Advisors, 2022).

Every state vocational rehabilitation program sets its qualification requirements for supported employment services (Riesen et al., 2022). In Ohio, the CESP is required for supported employment services (Opportunities for Ohioans with Disabilities Agency, 2022c). In 2022, OOD stated there was a statewide shortage of CESP, causing delays in individuals receiving supported employment services, and OOD modified the CESP requirement (Opportunities for Ohioans with Disabilities Agency, 2022b). Ohio's labor market faces a shortage of workers compared to the number of jobs available (Ohio Legislative Services Commission, 2023). The CESP requires a minimum of work experience and passing a test to obtain the credential (Association for People Supporting Employment First, n.d.-b).

## Assumptions Associated With the Problem

This study assumes that OPRA can help member agencies better prepare for the CESP by offering training or resource access. This study assumes that OPRA can inspire OOD to create required qualifications that can be efficiently implemented by providing relevant information on the employment specialist qualification issue. This study assumes that part of the CESP shortage can be attributed to movement in the labor market (i.e., high turnover) and is thus tied to labor market statistics (Opportunities for Ohioans with Disabilities Agency, 2022b).

## Knowledge Gaps Associated With the Problem

Inadequate or no knowledge exists on several contributing factors. For instance, as of this writing, no study has been conducted to assess the CESP relation to supported employment outcomes (T. Nelles, personal communication, July 17, 2023). Factors affecting an employment specialist's ability to pass CESP are unknown. Only anecdotal evidence exists on barriers to employing adequate CESP-credentialed staff. Currently, no evidence exists that one state vocational rehabilitation agency's qualification requirements provide better outcomes than another agency's qualification requirements (Riesen et al., 2022).

## Hunches, Ideas, and Hypotheses Associated With the Problem

This study includes the hypothesis that OPRA can provide relevant, meaningful value to member agencies by offering training on CESP-related topics to member agencies. Given adequate data, this study hypothesizes that OPRA can advocate for OOD's requirement to be modified to account for the one-year experience needed to qualify for the CESP exam. Finally, this study hypothesizes that a more efficient and

effective qualification may exist, and OPRA can advocate that OOD requires a different employment specialist qualification.

## **Ideation of Solutions Associated With the Problem**

OPRA's membership dues represent a significant portion of total revenue, requiring a continuous need to demonstrate actions that add value to members. While a problem exists with the CESP qualification, the amount of unknown information makes any strategic action unfeasible. OPRA leadership believes that aiding this problem aligns with the organization's core values. Finding solutions to this problem also aligns with the VBM's characteristics of deepening knowledge, compassion, and principled actions. OPRA leadership assumes that given more information on the issue, action plans can address the issue and add value to the organization. Possible solutions include changing the qualification or offering training.

## **The VBM: Additional Perspectives of the Problem**

The VBM emphasizes the nine virtues of service: support, sincerity, compassion, creativity, centeredness, principle, proficiency, and profoundness (Brooker & Boyce, 2017). This problem deviates from the VBM in several areas. The problem demonstrates an unprincipled aspect of the VR industry. Shallow levels of information are known. Services are held back due to a need for more credentialed employment specialists. However, certain VBM virtues appear. Short-term creative solutions have been offered to support CRPs and individuals with disabilities, and OPRA leadership desires to bring into focus possible solutions. Possible solutions demonstrate compassion to industry stakeholders by addressing the problem through advocacy and education.

## **Problem Statement**

Community rehabilitation providers throughout Ohio cannot meet the demand for supported employment services for individuals with disabilities (Opportunities for Ohioans with Disabilities Agency, 2022b). The shortage limits access to gainful employment for specific individuals with disabilities (Opportunities for Ohioans with Disabilities Agency, 2022b). Simultaneously, employers face a labor shortage where job openings are higher than the number of unemployed people in Ohio (Ohio Legislative Services Commission 2023). The driving force behind this insufficiency is the OOD (Opportunities for Ohioans with Disabilities Agency) requirement of the CESP (certified employment specialist professional) credential to provide the supported employment service combined with a shortage of CESP-credentialed employment specialists (Opportunities for Ohioans with Disabilities Agency, 2022b, 2022c). While an employment specialist qualification is not legally required, 38 states have a minimum education or credential qualification for supported employment services (Riesen et al., 2022). A national standard for an employment specialist qualification has yet to exist (Riesen et al., 2022). However, the Association for Persons Supporting Employment First is attempting to professionalize the employment specialist position by creating and offering the CESP (T. Nelles, personal communication, September 18, 2023). The CESP requires work experience, education, and passing an exam of field-related research-based questions as qualifications for the credential (Association for Persons Supporting Employment First, n.d.-b). Research does not exist to show that the CESP causes or is related to better employment outcomes for individuals with disabilities (T. Nelles, personal communication, July 17, 2023). Despite the inefficiencies in the Ohio vocational rehabilitation industry, other states' VR agencies are calling on OOD for recommendations on vocational rehabilitation operations (J. Burns, personal communication, September 7, 2023). A trend in trade associations is finding ways to increase member value (McKinley Advisors, 2022). OPRA leadership

has identified establishing best and promising practices of service provider qualifications as a key principle in its strategic plan (S. Marks, personal communication, March 29, 2023).

The specific problem is that the current CESP requirement in Ohio is a barrier for OPRA's member agencies to provide services efficiently to their customers: individuals with disabilities, the state VR agency, and employers. For the member agency, the challenges include a shortage of employees with the CESP credential, short-term refusal of OOD referrals due to capacity restraints, and member agency-created wait lists for individuals needing the supported employment service (Opportunities for Ohioans with Disabilities Agency, 2022b). Individuals with a disability needing supported employment services face longer wait times for services, leading to longer wait times for potential wages and benefits. The state VR agency, OOD, wants to position itself as a leader in VR services among its peers, including with employment specialist qualifications but faces reduced capacity to meet service goals, potential disengagement of participants, and a weakened capability to meet its goal of serving an additional 7000 participants per its strategic plan (Opportunities for Ohioans with Disabilities Agency, 2023a). The impact on employers is an obstruction to a labor source at a time when job openings exceed those unemployed (Ohio Legislative Services Commission, 2023). Critical to OPRA's success as a trade association and meeting its strategic plan is the need to remain significant to member agencies' concerns regarding the CESP requirement by seizing the opportunity to advocate for member agencies, provide relevant information to this area of concern, and be a resource to the VR industry within Ohio on the topic of employment specialist qualifications.

### **Driving Research Question**

This exploratory study details the impact of current quality measures for supported employment services on member agencies and individuals with disabilities and includes the identification of other state VR agencies' required qualifications for supported employment services. In addition to providing data on the relationship of the CESP on employment outcomes, barriers to member agencies to employ more CESP and alternative solutions to qualifications for supported employment service were determined as a result of focusing on answering the overarching research question for this study:

How can OPRA secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio vocational rehabilitation industry to positively impact individuals with disabilities and employer workforce needs?

### **Guiding Questions**

This study addresses the many knowledge deficiencies in current quality measures for employment specialists and provides areas for future research. This exploration includes primary qualitative data gathered from focus groups of member agencies, analysis of employment outcomes data gathered from secondary sources, and secondary qualitative literature reviews on other state VR agencies' service provider quality measures. The following questions helped to cultivate a more thorough understanding of the dynamics impacting employment specialist qualifications and guided the discovery of potential solutions that OPRA can utilize to provide valuable advocacy to member agencies.

1. What differences exist among trends in state qualifications for employment specialists?
2. How is access to services affected by the qualifications required by different states?
3. What are the barriers to CRPs employing CESP-credentialed employment specialists?

4. How can OPRA reduce the barriers to receiving the CESP credential?
5. What are the key indicators of quality employment outcomes for individuals with disabilities?
6. How do employment outcomes differ between a CESP-credentialed employment specialist and an un-credentialed employment specialist?
7. What benchmarks are useful in assessing OPRA's value to a member agency's ability to employ CESP staff?
8. What best practices used by trade associations create increased value for member organizations?
9. How does an exploratory study of employment specialist qualifications best suit the needs of OPRA to add value to its member agencies?

## **Scope of Study**

This study focused on creating a change management plan that allows OPRA leadership to influence the qualifications for employment specialists in Ohio, increasing OPRA's relevancy to its stakeholders. The assumptions, limitations, and delimitations confining the scope of this study are discussed below.

### **Assumptions**

Assumptions are beliefs generally acknowledged as true (Theofanidis & Fountouki, 2018). Assumptions in research impact research methods and findings (Theofanidis & Fountouki, 2018). One assumption of this study is that member agencies provided accurate and honest information regarding barriers they face when employing more employees with the CESP credential. A second assumption was that OPRA has access to member agencies' employment outcomes data that provides quality, standard information on outcomes and employment qualifications. A third assumption was that state VR agencies are honest and unbiased in reporting employment specialist qualifications and access to services for individuals with disabilities. A final assumption was that information provided by APSE regarding test information is accurate, honest, and unbiased. The researcher based these assumptions on communications with OPRA, member agencies, and APSE.

### **Limitations**

Limitations to a research study are unavoidable constraints beyond the researcher's control that influence research methodology, findings, and the applicability of conclusions (Theofanidis & Fountouki, 2018). This study is limited to Ohio's VR industry, utilizing existing outcomes data of OPRA members, a small number of focus interviews from member agencies, and information from other state VR agencies that use the CESP. These limitations hinder the generalizability of the results. However, the findings may guide future studies of employment specialist qualifications.

### **Delimitations**

Delimitations are the restrictions the researcher chooses to limit the study to ensure adequate focus on the research's purpose (Theofanidis & Fountouki, 2018). This researcher focused on the specific VR policies, qualification requirements, and employment outcomes found in Ohio, which may hinder the generalizability of VR in other states and globally.

## Potential Conflicts of Interest

This researcher has many connections with the Ohio VR industry, including recently serving on the APSE Development Committee, the purpose of which is to expand the use of the CESP as a standard employment specialist qualification by state VR agencies. APSE leadership was made aware of this study. An employee of APSE provided general information regarding the CESP, but APSE did not otherwise participate in or in any way influence this study or its findings. The CRP with which this researcher is affiliated is a member of OPRA. This researcher is an active member of OPRA and has participated in various focus groups with OOD.

While this researcher is connected to various organizations interested in the CESP in the VR industry in Ohio and nationally, this researcher did not stand to gain nor be penalized by any actual or potential findings contained within this study.

## Summary

The environment, industry, and organization were considered with respect to current conditions, trends, and noteworthy internal and external forces. Facts, assumptions, knowledge gaps, and ideated solutions were also identified. The various analyses illustrate OPRA's interrelation with the VR and trade association industries and susceptibility to the changing dynamics of each. Member concerns and opportunities for OPRA to increase its value to member agencies are equally interconnected. Exploring employment specialist qualifications lies at the juncture of a current member concern, an opportunity for OPRA to fulfill its purpose of informing and advocating, and an opportunity for OPRA to add value to its members and the vocational rehabilitation industry within Ohio.

## SECTION 3: EXPLORING SOLUTIONS



*Note.* From *Small Business Family Created for Disabled People* [Photograph], by Lisegagne, n.d., Getty Images Signature.

The following builds on the previous section's problem statement, overarching question, and guiding questions. A comprehensive review of these questions is necessary to gain a more thorough understanding of the problem and valuable insights into potential solutions. This review incorporates government resources, scholarly articles, trade publications, and websites to ensure that timely, pertinent information is collected and considered.

### Perspectives of the Problem

The business model for trade associations is considered to increase insight into the problem by exploring the issue from another perspective. When trade associations were surveyed, non-dues revenue was ranked the number one challenge, followed by communicating member benefits (Association Advisor, 2023). Interestingly, increasing the number of members or retaining more memberships were beyond the top three concerns. A traditional trade association business model defines memberships in and of themselves as the organization's key product (Bostrom, n.d.). However, engagement is increasingly replacing memberships as the critical product of trade associations (Bostrom, n.d.). A consequence of engagement tends to be additional revenue streams through conferences and education offerings (Bostrom, n.d.). Trade association leaders that strengthen and diversify member engagement also

reinforce and diversify the financial stability of the trade organization. However, engagement can only be fostered where members find value in it.

Multiple gaps in research exist on the role, impact, and value of trade associations (Lawton & Rajawani, 2018). Trade associations provide value propositions to clarify how the association offers tangible value to members in exchange for membership dues (Gonner, 2021). Value propositions effectively recruit and retain when highly visible to non-members and members alike (Gonner, 2021). A major threat to trade associations is that association membership is one of the first things member agencies cut during times of financial crisis (S. Marks, personal communication, March 29, 2023). Nearly half of trade associations that do not renew memberships do so due to a tighter budget (Advanced Solutions International, Inc., 2023). Furthermore, nearly a third of trade association members choose not to renew due to a lack of perceived value in the membership (Advanced Solutions International, Inc., 2023). Unfortunately, over half of trade associations find communicating value difficult (Association Advisor, 2023). Only half of trade associations rate their value propositions as compelling or very compelling (Rossell et al., 2023). This threat highlights the need for trade associations to add value to member organizations and communicate this value to members and non-members.

## **Comprehensive Review**

Making authoritative recommendations and providing valued influence on industry best practices requires a trade association to have extensive knowledge of impactful issues. OPRA leadership has identified provider qualifications as a critical issue within the vocational rehabilitation industry. OPRA leadership's desire to continue increasing value to its member agencies requires them to understand employment specialist qualifications thoroughly. Suitable qualifications for employment specialists incorporate many variables. The impact of employment specialist qualities on individuals with disabilities and the ability of agencies to employ quality employment specialists are two such variables. Moreover, OPRA leadership needs to ensure their actions add measurable value to member agencies and align with best practices within the trade association industry.

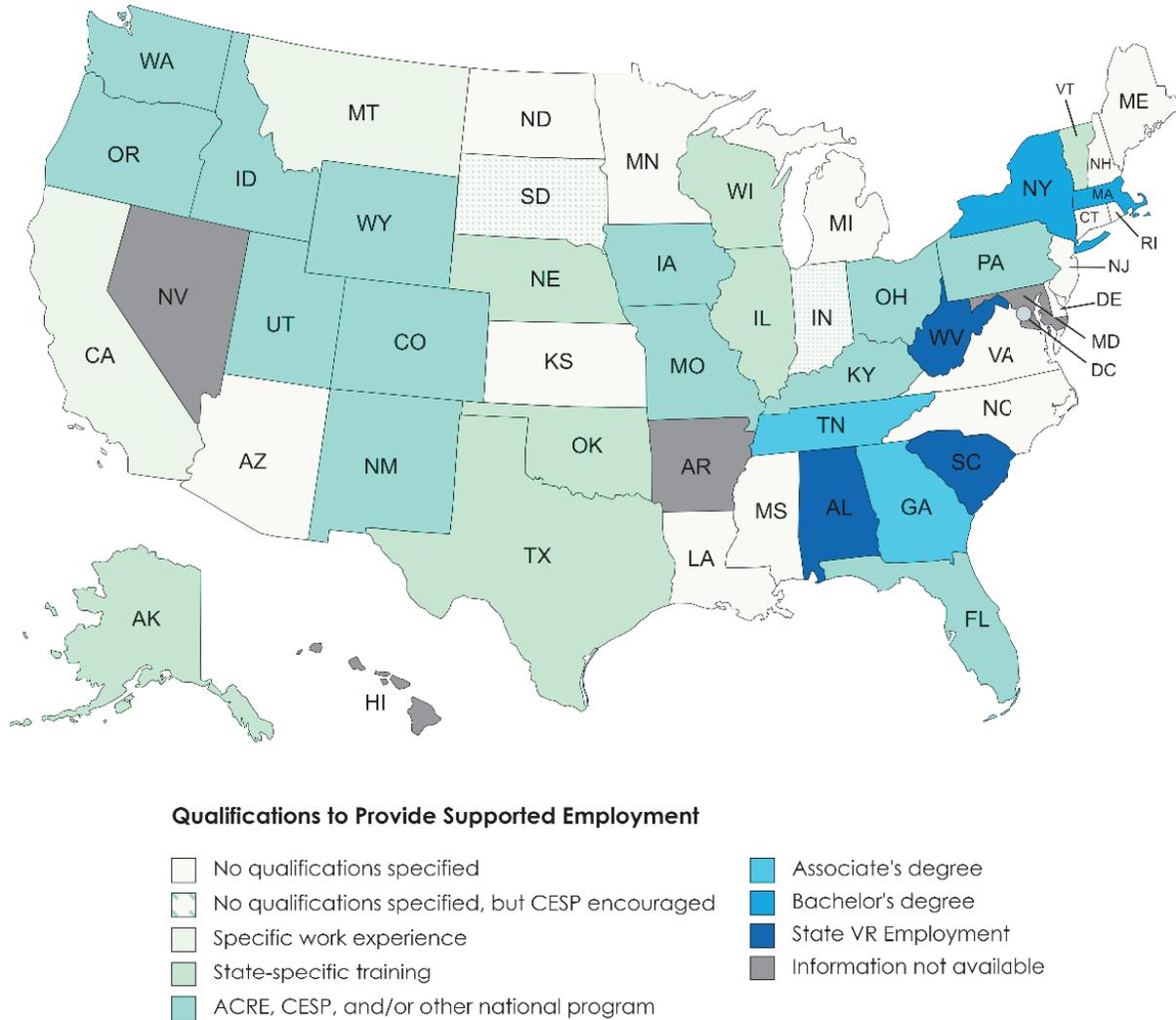
## **Variations Among States**

Since the success of supported employment services largely depends on the employment specialist (Riesen et al., 2022), qualified employment specialists are essential to the success of individuals with disabilities in achieving their employment goals (Cox & Land, 2019). While a federal standard for employment specialist qualification may not exist, only ten states do not require some form of qualification (Riesen et al., 2022).

## ***Variations in State Standards***

States that set a standard for professional qualification vary significantly in what is chosen as the qualification requirement. Some states use college degrees as training standards (Riesen et al., 2022). These degree requirements can range from an associate's to a master's degree (Riesen et al., 2022). Other quality standards utilized are the nationally available Association of Community Rehabilitation Educators training, the certified employment support professional credential, or a combination of these two widely accessible credentials (Riesen et al., 2022). Some states require employment specialists to complete state-specific training or training specific to supported employment (Riesen et al., 2022). Several states require a minimum amount of work experience in addition to one of the credentials listed above (Riesen et al.,

2022). Still, other states require the CRP to maintain a robust accreditation in lieu of each employment specialist maintaining their own personal professional credentials (Riesen et al., 2022). The differences among state-required qualifications specific to supported employment services are vast, as indicated in Figure 7.



Created with mapchart.net

**Figure 7. Map of State Qualifications<sup>8</sup>**

To fully understand and appreciate the differences among state operations and requirements, various states' qualifications for supported employment service provision are reviewed more in-depth in Appendix A. Many states, including Colorado, Georgia, and Tennessee, require education and credentials available through third parties (Colorado Department of Health Care Policy and Financing, n.d.; Georgia Vocational Rehabilitation Agency, 2023; Tennessee Department of Human Services, 2020). Third-party qualifications grant employment specialists flexibility in obtaining degrees from institutions of the specialist's choice in

<sup>8</sup> The figure above uses information gathered and listed in Appendix A. Mapchart.net was used to create the graphic.

various human service fields and acquiring multiple credentials. This flexibility gives the employment specialist and CRP agency several options to meet the qualification criteria. Additionally, employment specialists from other states may already possess these qualifications, widening the pool of potential employment specialists for these states.

Other states, such as Texas and Wisconsin, require state-specific education (Texas Workforce Commission, 2022, n.d.; Wisconsin Department of Workforce Development, n.d.). In requiring state-specific training, the state VR agencies have a greater ability to impact the cost of the training. For instance, Wisconsin's state-specific training is offered free of charge to employment specialists (Wisconsin Department of Workforce Development, n.d.). These trainings are much shorter than a typical college degree program. By reducing the time required to complete obligatory training, new employment specialists are more readily available to provide supported employment services.

### ***Continuing Education Variation***

In addition to the various requirements that state VR agencies set for supported employment services, sixteen states require continuing education (Riesen et al., 2022). Seven states require 1–10 hours of annual ongoing education (Riesen et al., 2022). The remaining nine states require 10–20 annual education hours (Riesen et al., 2022). Interestingly, while a federal mandate of employment specialist training does not exist, nearly one-third of states are committed to continued education and training in the field along with a baseline educational or credential requirement.

### ***Availability of State VR Services***

Despite every state VR agency's commitment to helping individuals with disabilities, 29 states have an order for selection in place (Rehabilitation Services Administration, n.d.-b). State VR agencies use an order of selection when they cannot serve every eligible individual (Rehabilitation Services Administration, n.d.-b). Instead of operating on a first-come, first-served basis, an order of selection serves the most significantly disabled individuals first (Rehabilitation Services Administration, n.d.-b). A state VR agency's selection order applies to all services, not specifically to supported employment services. Supported employment training requirements vary for states with and without an order of selection in place. Colorado, Kentucky, New Mexico, and Pennsylvania are all states that allow the CESP as proof of qualification and have an order of selection in place (Colorado Department of Health Care Policy and Financing, n.d.; Kentucky Vocational Rehabilitation, 2021, pp. 5–6; New Mexico Division of Vocational Rehabilitation, 2019; Pennsylvania Office of Vocational Rehabilitation, 2016, p. 4-5; Rehabilitation Services Administration, n.d.-b). Nebraska, Oklahoma, and Wisconsin require state-specific training and utilize an order of selection (Nebraska Division of Developmental Disabilities, 2022, p. 98; Oklahoma Rehabilitation Services, 2023, p. 28; Wisconsin Department of Workforce Development, n.d.; Rehabilitation Services Administration, n.d.-b). Oregon and Wyoming accept the CESP as a qualification and do not have an order of selection for services (Oregon Department of Human Services, 2022, p. 29; Rehabilitation Services Administration, n.d.-b; Wyoming Employment First, n.d.).

Each state's VR agency operates to best suit that state's needs. Hence, state policies and procedures vastly differ regarding working with CRPs, employment specialist qualifications, and even the definition of services. Most state VR agencies require minimum qualifications of employment specialists, with supported employment services sometimes requiring additional training or education (Riesen et al., 2022). Nearly one-third of states also require ongoing education (Riesen et al., 2022). Each state's unique

composition of policy, need, VR leadership, and economic conditions contribute to whether an order of selection is in place.

## ***Ohio's Qualification Standards Compared With Other States***

Ohio's state VR agency, OOD, is not unique in utilizing the CESP as a standard for qualification for providing supported employment services. However, the implementation of this requirement is unique in a few ways. OOD's policy does not allow alternative nationally recognized programs, such as ACRE, instead of the CESP. OOD's policy in its current form does not allow a grace period such as 12–18 months to provide services while working towards earning the credential, essentially requiring employment specialists to have one year of related work experience before being qualified to provide supported employment services. OOD's policy is not alone in requiring work experience. OOD's policy differs in that the requirement is not explicitly stated but implied as work experience is required to obtain the CESP. While the OOD policy on qualifications for employment specialists to provide supported employment is unique, the qualifications align with many other state requirements. See Appendix E for individual state requirements. While the qualification is more stringent than in states that do not require any specific training or only state-specific training, the qualification is more lenient than the many states requiring an associate's or higher college degree. OOD's policy also aligns with other states requiring ongoing training. The CESP qualification in Ohio is reasonably similar and equitable compared to other state VR agencies' qualification requirements.

## **Impact of Credentials**

Certifications are formal designations that signify competence or knowledge essential for performing a particular job (Dill et al., 2022). More research is needed regarding the impact of any specific credential for employment specialists on employment outcomes (T. Riesen, personal communication, April 27, 2023). However, research suggests that credentials positively impact customer experience and outcomes in related human service fields (Aliff & Sprong, 2020; Kim, 2020; Sherman et al., 2019). Credentials also impact the credential holders and the organization's staffing of qualified employees.

## ***Impact on the Organization***

Pressure to recruit and retain a workforce of qualified employees is not specific to community rehabilitation providers. High turnover increases the cost of training for agencies (Kim, 2020). Direct care workers are difficult to staff due to poor working conditions (Kim, 2020). Competitive wages and low unemployment also make recruiting and retaining an adequate workforce challenging (Cox & Land, 2019). The industry's shortage of direct care workers is an urgent issue (Kim, 2020).

The cost related to training and credentialing a workforce may seem high, but the cost of continuous recruiting and training is also high (Kim, 2020). Organizations should support their workforce through the credentialing process (Dill et al., 2022). This investment not only provides a more effective workforce but also a workforce that is less likely to leave the organization. The complaint that credentials add to workforce shortages is not supported (Kim, 2020). Research suggests credentials can alleviate shortages by encouraging underrepresented workers into mid-level skilled professions (Kim, 2020; Rios et al., 2018).

While certificates can slow recruitment (Kim, 2020), credentials have been shown to increase job satisfaction and reduce turnover (Suminanto et al., 2023; Whitehead et al., 2019). Another contributing

factor to increased retention is the increase in worker confidence for certificate holders (Kim, 2020). The long-term care industry sees credentialing as critical to increasing worker retention and combatting workforce shortages (Kim, 2020). Credentials make occupations more accessible to marginalized groups who are underrepresented in college degree programs (Kim, 2020).

### *Impact on the Credential Holder*

The CESP falls into a category of credentials classified as sub-baccalaureate certificates. Sub-baccalaureate certificates are issued by organizations other than government entities to prove that specific knowledge and skills have been obtained (Baird et al., 2022). An unpublished nationwide survey of CESP-credentialed employment specialists was conducted in 2022, which indicated that professionals earlier in their careers



*Note.* From *Disabled Students* [Photograph], by Fatcamera, n.d., Getty Images Signature.

benefit more from the credential than senior professionals (T. Nelles, professional communication, April 17, 2023). However, a thorough review of published literature revealed gaps in the career benefits and barriers to employment specialists obtaining a CESP. However, sub-baccalaureate certificates have been shown to impact careers in similar social service and health industries.

Individuals with behavioral health disorders can earn a certified peer specialist designation in many states (Ostrow et al., 2022). These specialists can use their certification to help others receive services by drawing on their own experiences (Ostrow et al., 2022). When a sample of certificate holders was studied across four states, those utilizing their certificates were more likely to be employed and more likely to have benefits (Ostrow et al., 2022). Most importantly, those working in jobs that required this certificate were more likely to be satisfied with their job (Ostrow et al., 2022).

A recent study examined the effect of sub-baccalaureate certificates on employees in entry-level healthcare positions (Dill et al., 2022). Those with a certificate were more likely to be employed full-time and year-round (Dill et al., 2022). Employment probability increased by 37% for those with certificates (Baird et al., 2022, p. 19). Certificate holders were likelier to receive employee benefits such as health insurance and retirement (Dill et al., 2022). Higher wages were also linked to those who obtained a certificate in their field (Dill et al., 2022). The study found that overall, weekly earnings were 4.8% higher for those with a certificate (Dill et al., 2022, p. 5). Certificates that are integrated into career paths by employers tend to have more significant wage increases and career advancement possibilities (Dill et al., 2022). Sub-baccalaureate certificates are vital for professionals seeking positions requiring mid-level skills.

Also, within healthcare, nursing credentials have been shown to be valuable to the holder. Certifications led to greater esteem by co-workers and other professionals (Whitehead et al., 2019). Nurses with certificates were more likely to be paid more than their non-certified peers (Whitehead et al., 2019). Nursing certificates led to an increase in several intangible areas, such as personal satisfaction, personal validation, and job satisfaction (Whitehead et al., 2019).

Overall, certifications positively impact a person's career. Certifications are related to greater job stability through increased employment, increased hours, and protection from seasonal or temporary work. Certificate holders tend to have better wages and better tangible benefits. Certificate holders also have increased intangible benefits such as job satisfaction and personal empowerment.

### ***Impact on the Client's Experience***

Ample research has been completed regarding the qualifications of vocational rehabilitation counselors and their credentials' impact on outcomes. VR counselors provide case management for individuals with disabilities and work for state VR agencies. VR counselors decide which services an individual with a disability receives and, in some cases, may provide services on a limited basis.

VR counselors with master's degrees produce more effective employment outcomes than counselors with a bachelor's degree when working with individuals who need supported employment (Sherman et al, 2019). A VR counselor with a master's degree increases successful outcomes by 5.3% for individuals with significant disabilities (Sherman et al., 2019, p. 51). Additionally, VR counselors with a Certified Rehabilitation Counselor (CRC) national credential demonstrate higher quality services. Counselors with the CRC are considered more professional and better engaged with individuals (Sherman et al., 2019). Additionally, peers perceive CRC holders as having a better understanding of ethics and the needs and experiences of individuals with disabilities (Sherman et al., 2019). Interestingly, the Workforce Innovation and Opportunity Act modified the minimum educational requirement for vocational rehabilitation counselors to a bachelor's degree after it had previously been set as a master's degree by the Rehabilitation Act (Haines et al., 2018). VR agencies may hire VR counselors with only a bachelor's degree to meet the demand for services even though a master's degrees increase successful outcomes (Haines et al, 2018). The Department of Veterans Affairs Veteran Health Administration has since increased the educational requirement to a master's degree and requires the CRC for its rehabilitation counselors (Aliff & Sprong, 2020). Appropriate education, professional experience, and a national certification advance the profession of vocational rehabilitation counselors overall (Aliff & Sprong, 2020). These qualifications lead to higher quality experiences and outcomes for individuals with disabilities.

As described above, research indicates that industry credentials impact various stakeholders within the industry, including agencies, employees, and customers. Industry credentials can be useful in stabilizing a workforce, increasing employment opportunities for credential holders, and improving client outcomes. However, they also pose disadvantages by slowing recruitment efforts by agencies and creating a costly barrier to employees.

### **Measures of Quality Services**

The crux of employment specialist qualifications is the services' impact on individuals with disabilities. Without a universal standard of successful employment outcomes, the method of gauging quality services must be considered (Ikutegbe et al., 2023). Individuals have three outcomes from services: purpose, participation, and quality. Purpose outcomes relate to employment's impact on a person's sense of purpose (Teixeira et al., 2020). Participation outcomes reflect participation in the labor force (Krause et al., 2018). Quality outcomes focus on tangible job markers, such as income and benefits (Krause et al., 2018). Considering the multiple aspects of employment on individuals aligns with the social model of disability versus the medical model, considering intangible components of an individual's feelings and aspirations

regarding work (Ikutegbe et al., 2023). A holistic view of quality also considers the individual's experience during services and the final outcome of service.

Purpose outcomes directly influence how an individual with a disability feels about themselves. Individuals should feel empowered, self-accepted, and hopeful due to working with an employment specialist (Teixeira et al., 2020). Purpose outcomes are achieved through quality interactions and partnerships between individuals and employment specialists (Teixeira et al., 2020). In this sense, a successful employment outcome also supplies quality social interactions with co-workers, supervisors, or customers (Ikutegbe et al., 2023). Effective purpose outcomes increase individuals' confidence in a better career (Teixeira et al., 2020). Purpose outcomes, while intangible, are a valuable benefit to quality services.

Participation outcomes are measures of labor force contribution (Krause et al., 2018). These measurements include length of employment history, hours worked each week, and retirement age (Krause et al., 2018). If an individual is born with a disability or acquires a disability early in life, time to first competitive, integrated employment job and job tenure are also outcomes of participation (Frederick & VanderWeele, 2019). RSA measures participation for a short duration, looking at employment rates six months and one year after employment begins (Rehabilitation Services Administration, 2023). Participation outcomes reflect labor force involvement throughout an individual's life or as a snapshot in time.

Quality outcomes lead to career advances. These outcomes include wages, benefits, promotion opportunities, and job satisfaction (Krause et al., 2018). Wages and benefits are objective measures of quality that are classic evaluation tools for job prospects. Career advancement possibilities may be more difficult to rank but are equally important in evaluating a quality job. RSA measures credential attainment to evaluate promotion opportunities (RSA, 2023). Job satisfaction encompasses feelings about pay, the nature of work, job security, flexibility, and more (Keating et al., 2022). Job satisfaction is subjective in nature (Krause et al., 2018), and a study has found that age and significance of a disability can impact how a person rates job satisfaction (Keating et al., 2022). Quality outcomes offer a mix of objective and subjective measures of the effect a job has on a person's career path.

While not an outcome, individual service experience is another measure of quality. Confidence in the provider's field expertise, professionalism, and meaningful interactions determine quality service experiences (Sherman et al, 2019). Field expertise includes awareness of various disabilities and how these interact with employment as well as identifying barriers to employment and solutions to these barriers. Professionalism refers to respect for yourself and others, honesty, integrity, responsibility, and commitment to continuous improvement and self-regulation" (Žiaková et al., 2023, p. 344). Meaningful interactions foster feelings of connection, are meaningful to both parties, own one's influence on the interaction, and consider the interaction context (Penninga et al., 2022). Like job satisfaction, these experience measures are intangible and subjective in nature but no less important than the measures of outcomes.

Service quality is evaluated by its outcome and the individual's experience. Service outcomes include impact on the individual's purpose, labor force participation, and employment quality. Experience is impacted by expertise, professionalism, and interactions. These quality measures include tangible and intangible measures and objective and subjective measures to incorporate a holistic quality evaluation.

## Benchmarking

Benchmarking entails scrutinizing industry or competitive practices, functions, and products to identify opportunities for meeting or enhancing them (Little, 2016). It can reduce costs, improve service quality, and increase profits (Little, 2016). Trade association leaders need to know if they are providing value to members. Trade association leaders can utilize benchmarks in strategic positioning and member engagement to measure value.

McKinley Advisors note that the current strategic priorities in trade associations are as follows:

- Membership value and growth
- Organizational management strength
- Business model transformation
- Diversity, equity, and inclusion commitment (McKinley Advisors, 2022, p. 1)

Strategic trade association leaders are adding transparency and agility to association governance (McKinley Advisors, 2022). Increasing non-dues income and decreasing expenses have emerged as critical components in trade associations (McKinley Advisors, 2022). Intentional efforts to strengthen diversity and equity within governance, members, and the industry are being made to create an inclusive culture (McKinley Advisors, 2022). Two top concerns to trade association leaders are conveying benefits to members successfully and involving professionals early in their careers (Association Advisor, 2023). Trade associations that utilize a member engagement strategy may implement this in tandem with software built for membership management. Software programs provide valuable data insights, allow for a customized member experience, reduce staff time, manage events, and manage learning opportunities (Willis, 2022). Trade association leaders must welcome new data to foster dialogue and steer action (Miller, 2023). Understanding a trade association's industry is essential to strategic positioning and providing substantial value to members. Finally, having a dedicated plan for innovation strategically positions an association to increase memberships (Rossell et al., 2023).

Trade associations access benchmarking data through various industry reports. Various measures exist to assess strategic positioning, including the growth of non-dues revenue and the percentage of non-dues revenue compared to overall income. An essential indicator is the number of times associations engage with members each month and through what medium. How well information is utilized for decision-making is another significant measure for trade association leaders. A final indicator is whether the association has a dedicated plan for innovation, whether it is implemented, and whether it works.



*Note. From Employee With Down Syndrome [Photograph], by FG Trade, n.d., Getty Images Signature.*

Members value professional development opportunities from their trade associations, and members desire trade associations to influence trends in the industry (McKinley Advisors, 2022). Association members rank virtual and in-person events as two of the top five activities adding value to their association membership (Higher Logic, 2023, p. 6). One method of measuring a trade association's value is through member engagement in trade association activities. The most critical measure of member engagement is

attendance at association-sponsored events (Association Advisor, 2023). While 91.5% of trade association leaders perceive value in conferences, 70.3% of association leaders also perceive value in training and development events, making these the second most valuable type of event (Association Advisor, 2023, para. 5). Association members also rank webinars and conferences high in adding value to their membership (Higher Logic, 2023). Nearly two-thirds of association members also consider their membership to influence their careers positively (Higher Logic, 2023). Popular measures of engagement include attendance at events, committee participation, survey feedback, and interaction with social media. Membership data also measures engagement and the perceived value of membership. These measures include the total number of members, the percentage of members that renew, and the length of membership.

OPRA leadership is justified in pursuing avenues to increase the value of its membership. Membership value is one of the top strategic priorities of trade associations (McKinley Advisors, 2022). Strategic positioning also requires a thorough knowledge of VR trends and new data to influence dialogue in the VR industry tactically.

## Best Practices

Best practices originated as a methodical approach to continuous process and quality improvement in the industrial sector (Nelson, 2014). In nursing, best practices refer to the ongoing, cooperative, and methodical procedures for evaluating and analyzing the effectiveness and deficiencies of internal programs (Nelson, 2014). Nursing best practices can also be defined as a recurring set of individual and group actions demonstrated within a system where patient care is administered in a way and setting that enhances the potential for optimizing desired results (Nelson, 2014). As the concept of best practices spills to other industries, the definition mutates to fit the specific business sector but maintains the spirit of commitment to quality and customer satisfaction.

A trade association is a conduit of information, disseminating regulatory and industry information to members and gathering collective member insight to influence government policy (Rajwani et al., 2015). Trade association membership is voluntary, encouraging leaders to focus on issues pertinent to members (Lawton et al., 2018). As such, best practices in professional development and stakeholder influence are systematically explored below.

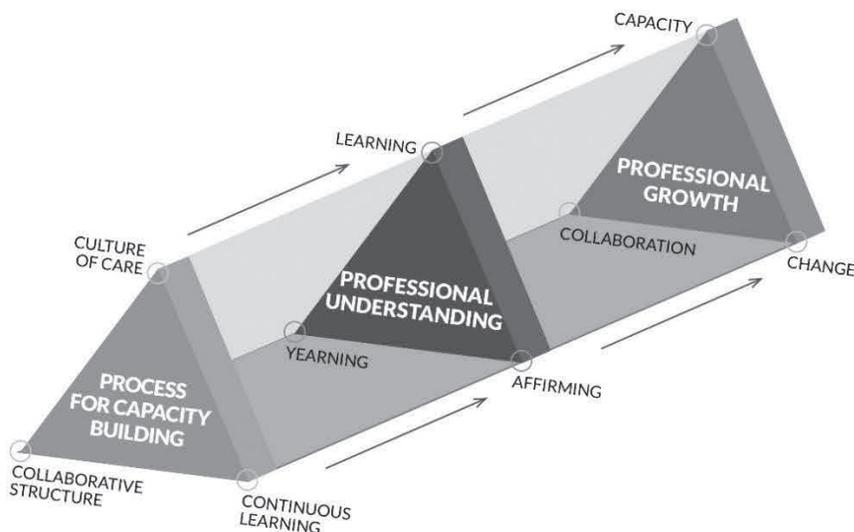
## Professional Development

Professional development in nursing and education is reflected in the VR field due to the similarities because the three industries provide a high degree of hands-on service to vulnerable populations. Best practices in nursing professional development rely on three main components: directive, evidenced-based, and quality-focused (Nelson, 2014). However, best practices in education professional development are built on partnership, ongoing education, and rapport (Youmans & Godden, 2022).

**Nursing Industry.** Professional development in nursing builds on three main elements. First, a directive or standard must be set to which a commitment to follow is displayed (Nelson, 2014). Second, the standard or practice is grounded on evidence that the practice will produce the desired result (Nelson, 2014). Finally, professional development strives for quality by utilizing methods that epitomize the most recent and efficient methods, integrating contemporary evidence, clinical expertise, and fundamental medical

understanding (Nelson, 2014). In nursing, professional development relies on improving understanding of relevant and up-to-date evidence, incorporating accepted knowledge, and setting standards to observe.

**Education Industry.** Professional development best practices in teaching rest on the foundation of collaborative structure, continuous learning, and a culture of care (Youmans & Godden, 2022). Each of these three components is transformed as the Coalition Model for Professional Development model is implemented (Youmans & Godden, 2022). See Figure 8. As the components morph, the educator attains professional growth (Youmans & Godden, 2022).



**Figure 8.** Coalition Model for Professional Development<sup>9</sup>

Collaborative structure refers to the mix of affiliation and independence that teachers share with each other (Youmans & Godden, 2022). As this unstructured relating of concepts continues, sharing deepens through requests for assistance and reciprocated support. Finally, full collaboration is obtained when teachers commit to mutual goals and shared tasks (Youmans & Godden, 2022). Collaboration generates innovation (Youmans & Godden, 2022). Interprofessional collaboration is essential in education and can be established through “mutual respect, trust, and open communication” (Youmans & Godden, 2022, p. 287) with professionals from various backgrounds and roles within the industry. Interprofessional collaboration is necessary for complex problems and sustainable solutions (Youmans & Godden, 2022). Developing a collaborative structure into full collaboration is one step in fostering professional growth in teachers (Youmans & Godden, 2022).

Continuous learning refers to opportunities for continuous professional development that are ongoing, relevant, and action-oriented (Youmans & Godden, 2022). Persistent, supported education allows reflection, affirmation of knowledge, and adoption of change (Youmans & Godden, 2022). Five professional development methods include “inquiry, collaboration, coaching and mentoring, observation

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<sup>9</sup> This model shows the progression from building capacity to learning to professional development. From “The Coalition Model for Professional Development,” by A. Youmans and L. Godden, 2022, *Teaching: Theory and Practice*, 28(3), p. 286. Copyright 2022 by Routledge Taylor & Francis Group.

and networks” (Youmans & Godden, 2022, p. 288). Six effectual components of professional development include pertinence of the material, identified intentions of learning, professional support, recognition of existing expertise, integration of tactics to both acquire and impart knowledge, and encouragement of investigation and discovery (Youmans & Godden, 2022). Teachers are provided a pathway to true professional development through persistent, continuous learning that allows participation, reflection, and change (Youmans & Godden, 2022).

A culture of care begins with the perspective that a student is a whole person with interrelated factors affecting development and academics (Youmans & Godden, 2022). Fostering this culture employs four tactics: demonstrating caring actions and responses, significant discourse, positive reinforcement, and repetitious moments of engaging in care (Youmans & Godden, 2022). Engaging in these practices with students builds an association of recognition, support, and trust in learning (Youmans & Godden, 2022). Caring practices among peers encourage the capacity for teachers to develop satisfaction and commitment to the profession, facilitating professional career growth (Youmans & Godden, 2022).

The Coalition Model for Professional Development builds on a foundation of first building capacity for growth by putting into place collaborative structures, a culture of care, and continuous learning Coalition Model for Professional Development. These three elements are then further developed to progress a professional to understanding and finally to professional growth (Youmans & Godden, 2022). Interactions and relationships with various peer groups are fundamental to advancing along the path to growth in culture and collaboration. Reflection, investigation, and relevancy are critical to effective continuous learning.

The professional development best practices presented for the nursing and education fields overlap and are distinctive from the two professions. A commitment to professional growth through collective responsibility and shared values allows collaboration and mutual learning. Continuous learning is marked by persistent support of engagement in and reflection upon emerging evidence-based practices while incorporating existing expertise. A culture that incites compassion, trust, and recognition is intentionally promoted.

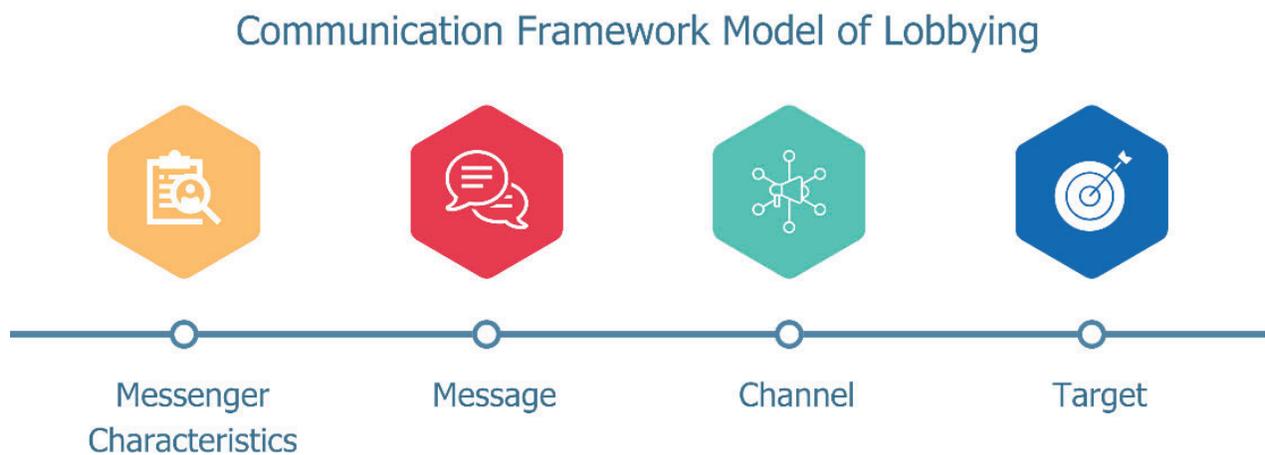
## ***Stakeholder Influence***

Trade associations balance many competing stakeholder interests. Other types of groups also engage in a similar balance. Coalitions, unions, and lobbyists are organizations or alliances that must effectively interact with stakeholders with competing interests. Best practices in stakeholder engagement and influence within coalitions and lobbyists are examined.

**Coalitions.** These groups are typically formed for political reasons, whether to acquire a majority of opinion, generate a legitimate alternative, or boost a desired outcome (Doherty, 2004). While strong communication, structure, and goals of a coalition are necessary for successful operations, four critical elements must exist for the coalition to operate successfully with represented stakeholders. First, the coalition focuses on solutions that benefit everyone (Doherty, 2004). Relationships are grounded in empathy, trust, and a desire to understand (Doherty, 2004). To achieve the best possible outcome for all, individual desired outcomes are revised or modified to collaborate successfully (Doherty, 2004). Each stakeholder is appreciated for their distinctive qualities and is rewarded for their contributions with equitable input and gain (Doherty, 2004). Ensuring quality influences with stakeholders means the

coalition must run with equity, respect, collaboration, and a balance of individual interests with the interests of the collective group.

**Lobbyists.** Lobbying organizations exist to seek to influence legislative opinions and decisions deliberately (Bauer, 2014). Lobbying can be framed as a communication process with four elements: the characteristics of the messenger, the message, the channel of communication, and the target (Mohammed, 2019). See Figure 9. Messenger characteristics include the resources, size, and type of organization the lobbying agency is or represents (Mohammed, 2019). The message is the information the messenger conveys and is tactically crafted based on the interaction in which it will be delivered (Mohammed, 2019). The channel of communication can be public or private (Mohammed, 2019). The target includes those who are most likely in agreement with the message, those who are undecided, and those whose views are antagonistic (Mohammed, 2019). A lobbyist can handle any one of these communication steps in an unscrupulous manner. For instance, lobbyists decide what information to include or exclude in the message (Mohammed, 2019). As such, best practices in lobbying must center on responsible and ethical practices.



**Figure 9.** *Communication Framework Model of Lobbying*<sup>10</sup>

The Responsible Lobbying Model, shown in Figure 10, furthers the communication framework of lobbying by addressing both lobbying content and process. The model begins with a foundation in an ethical dialogue (Bauer, 2014). Ethical processes in lobbying include identifying all stakeholders, compiling quality data, engaging in transparent discussions, promoting public interest over special interest, and avoiding or conscientiously handling conflicts of interest (School of Public Policy Blog, 2023). These actions must form the basis of every step in the lobbying communication framework to achieve ethical, responsible lobbying.

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<sup>10</sup> This model frames lobbying as a communication process. From “Do Bureaucratic Organizations Lobby? The Case of Ghana Immigration Service,” by A. K. Mohammed, 2019, *Halduskultuur—The Estonian Journal of Administrative Culture & Digital Governance*, 19(2). Copyright 2019 by Ragnar Nurkse School of Innovation & Governance.



**Figure 10.** *Responsible Lobbying Model*<sup>11</sup>

From a foundation in ethical practices, three pillars arise in the Responsible Lobbying Model to address the process of lobbying:

- Analytical evidence supports that lobbying practices demonstrate social responsibility.
- Acknowledgment and attentiveness are given to the interests of stakeholders.
- Organizational goals support the well-being of society (Bauer, 2014).

These pillars recognize that lobbying organizations must also participate in corporate social responsibility practices to ensure that the greater good of society is advanced without neglecting the critical needs of stakeholders. The benefits of responsible lobbying are increased credibility, the building of trust in the practice of lobbying, potential profitability from environmentally-friendly business practices, and a decreased risk of grassroots efforts circumnavigating the lobbying process due to increases in information and ease of mass mobilization of the general public (Bauer, 2014).

Coalitions and lobbying organizations represent groups with a common goal though the individual members of the group can be quite diverse. Best practices in the operations of these groups include the treatment of its internal stakeholders and the treatment of external stakeholders. Best practices demonstrate collaboration, empathy, trust, commonality, and equity toward internal stakeholders (Doherty, 2004). Best practices require consideration of social responsibility, impact on external stakeholders, and impact on society (Bauer, 2014). Finally, best practices must be grounded in ethical principles (Bauer, 2014; School of Public Policy Blog, 2023).

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<sup>11</sup> This model shows the various components and relationships within responsible lobbying. It was adapted from “Responsible Lobbying: A Multidimensional Model,” by T. Bauer, 2014, *Journal of Corporate Citizenship*, 53, p. 66. Copyright 2014 by Greenleaf Publishing. Used with permission.

## ***Best Practices in Relation to OPRA***

In exploring the challenges with the CESP in Ohio, OPRA leadership is poised to leverage key professional development strategies drawn from the nursing and education fields. OPRA leadership should consider key components taken from the nursing industry. The standard must produce the desired outcome and should epitomize efficiency, VR expertise, and research-based evidence. The Coalition Model provides OPRA leadership with a foundation for intentionally cultivating a professional growth culture. One critical component of creating this culture is ongoing encouragement to engage in emerging evidence-based methods. Incorporating elements of compassion, trust, and recognition gleaned from the professional development best practices in nursing and education is essential for OPRA leadership to craft a solution that delivers tangible value to its members.

To effectively navigate ethical stakeholder influence, OPRA leadership can gather valuable insights by examining best practices in coalition-building and lobbying strategies. Proposing mutually beneficial solutions while recognizing each stakeholder group's unique perspective, OPRA leadership can champion change through collaboration, understanding, and equity. OPRA leadership must prioritize modifications that increase alignment with the ultimate goal of employment equality for individuals with disabilities. Ultimately, OPRA leadership must prioritize ethical considerations and uphold integrity in all endeavors to exert influence.

## **Research Methodology**

The above literature review provides best practices for the role trade associations play in industry innovation and benchmarks for member agency engagement. The review identified key components of quality outcomes for individuals with disabilities. Finally, the literature review provided a foundational understanding of the impact sub-baccalaureate certificates have on the various stakeholders in an industry. Continued investigation will explore the challenges of the sub-baccalaureate credential to member agencies and explore patterns in outcomes based on employment specialist qualification.

Exploratory data analysis is ideal for this study, intended for pattern or trend identification (Fife & Rogers, 2020). As the proposed areas of study have not been researched, an exploratory study is best suited to achieve the desired goal of gaining insight and laying the groundwork for later research (Haile, 2023). Exploratory studies are known for smaller sample sizes, collecting primary data that is typically qualitative, and producing provisional analysis as opposed to conclusive results (Haile, 2023).

Riesen et al. (2022) note the lack of research that combines state-required service provider qualifications with employment outcome data. The RSA-911 report contains performance data for each state VR program (Riesen et al., 2023). Riesen et al. note that employment outcomes data in the RSA-911 report contains many uncontrolled variables, making significant conclusions difficult (Riesen et al., 2023). Additionally, a study has yet to be conducted to show that an employment specialist with a CESP is more qualified to provide services than an employment specialist without it (T. Nelles, personal communication, July 17, 2023). Due to the lack of previously found patterns, confirmatory data analysis is not the best research approach (Fife & Rodgers, 2022). Exploratory data analysis is suited for discovering and detecting patterns (Fife & Rodgers, 2022). However, certain conditions must be met for exploratory analysis to maintain credibility and transparency.

Exploratory research must incorporate certain characteristics for credibility. The research design promotes replication (Jebb et al., 2017). The research focuses on discovery and not making strong conclusions (Jebb et al., 2017). Data analysis avoids p-hacking (Jebb et al., 2017), which is the practice of forcing significant results from data (Botella & Suero, 2020). Exploratory data must be identified as exploratory and not mixed with confirmatory methods (Jebb et al., 2017). As such, hypothesis tests and confidence intervals are inappropriate for exploratory data analysis (Fife & Rodgers, 2022). Exploratory research containing these characteristics establishes credibility in the research design.

When conducting an exploratory study, rules must exist to maintain research transparency (Fife & Rodgers, 2022). Three rules that apply include findings that can be discovered but not confirmed, findings that must be presented as discovered and not confirmed, and findings that must be noted as provisional until confirmed (Fife & Rodgers, 2022). The purpose of exploratory research is to discover patterns for future investigations to pursue, not confirm if a hypothesis is true (Fife, 2020). Thus, keeping to these rules allows for transparency in the limitations of exploratory research results.

Currently, there is a lack of knowledge regarding the CESP as a measure of service provider qualification and as an influencer within the VR industry. The absence of available information and inconclusive results of a previous study provide evidence that an exploratory study is appropriate for researching the CESP in the Ohio VR industry.

## **Synopsis of the Literature**

The literature above reveals extensive insights into credentials and their impact on outcomes. The qualifications that state VR agencies use to qualify employment specialists providing supported employment services are vast. The qualification of the CESP utilized by the Opportunities for Ohioans with Disabilities Agency is easier to obtain than the college degrees some states require while still requiring more resources than other states impose. In addition to VR counselor credentials improving outcomes for individuals with disabilities, sub-baccalaureate credentials in related fields also improve customer outcomes. Furthermore, sub-baccalaureate credentials increase the employability of the credential holder and provide stability in the workforce for employers. Key employment outcome measures for individuals with disabilities include tangible elements such as wages and hours but intangible elements such as job satisfaction and meaningful interactions with the employment specialist.

The literature above also provides essential comprehension of the balance trade associations must maintain in their industries. Trade associations utilize key benchmarks to gauge strategic positioning and member engagement. Simultaneously, trade associations integrate and disseminate information to advocate for sensible government policy, address evolving concerns, and moderate the industry discourse.

## **Identification of Potential Solutions**

Considering the literature review, potential solutions revolve around gathering information to address the identified gaps in knowledge. It is hypothesized that no information exists on the benefits of a CESP credential to an individual with a disability and that OPRA leadership would benefit from an analysis of individual employment outcomes related to the CESP credential. It is hypothesized that more information is needed as to the barriers member agencies face to recruiting and retaining adequate numbers of CESP-credentialed employees and that OPRA leadership would benefit from identifying patterns in this obstacle.

An exploratory study into employment outcomes and workforce barriers would increase opportunities for OPRA leadership to increase its value to members.

## **Need for Further Investigation**

The comprehensive literature review supports the overarching question by thoroughly examining employment specialist qualifications, the impact of credentials, effective measures of outcomes, trade association benchmarks, and best practices. Emphasizing the importance of industry knowledge for trade association leaders, this review contributes to a comprehensive understanding of both the VR and trade association industries.

Following the secondary research, further investigation was still needed to understand member agencies' struggles to maintain an adequately credentialed workforce and analyze the differences in employment outcomes based on employment specialist qualification.

## **Summary**

The preceding section offered perspectives on the presenting problem and conducted a comprehensive review of the guiding questions. The comprehensive review extensively examined state VR agencies' qualifications for providing supported employment services. While no best practice is currently available for employment specialist qualifications, the effect of qualification standards and sub-baccalaureate certificates on industry stakeholders supported the need for a minimum qualification. Various measures of successful employment outcomes were offered, identifying tangible and intangible measures to evaluate outcomes holistically. Trade association benchmarks revealed the need for sound strategic planning and emphasizing member engagement. Finally, the review of trade association's best practices demonstrated trade associations' critical function in government policy, emerging issues, and transforming industry. An exploratory study was identified as the methodology for further research into member agency challenges of employing a qualified workforce and identifying trends in employment outcomes based on provider credentials.

## SECTION 4: MULTIPLE PERSPECTIVES AND TEST SOLUTIONS



*Note. From Volunteer With Intellectual Disability Working at Bakery Workshop [Photograph], by Ferrantraite, n.d., Getty Images Signature.*

The previous section cultivates a more thorough understanding of the issues surrounding this study through a comprehensive review of the guiding questions. This literature review provides insights into variations among state qualifications for employment specialists, the impact of credentials on an industry's labor force, and quality service measures. Finally, Section 3 considered the Coalition Model for Professional Development and Communication Framework Model for Lobbying as best practices for professional development and influencing stakeholders. Further research into the impact of the CESP credential is needed to understand opportunities for OPRA to increase member value through involvement in employment specialist qualification standards. In Section 3, an exploratory research design was identified as appropriate for conducting research into the CESP credential due to the current lack of knowledge.

### Multiple Perspectives Framework

Framing and reframing a problem dynamically shifts perspective and alters potential solution ideation (Beckman, 2020). Framing a problem deepens and broadens comprehension (Beckman, 2020). To incorporate multiple frameworks, data collection and analysis includes the following tools: NOISE (Needs, Opportunities, Improvements, Strengths, and Exceptions), the Delta Model, the McKinsey 7-S Model, and

the Virtuous Business Model. The researcher incorporated these analysis tools in the data collection process, data analysis, identification of potential solutions, and selection of optimal test solution(s).

## NOISE Analysis

A SWOT analysis for OPRA is shown in Figure 5 in Section 2. A NOISE analysis differs in that it considers the needs, opportunities, improvements, strengths, and exceptions of an organization (Cardus, 2022). A NOISE analysis is an alternative perspective to a SWOT analysis for the purpose of identifying actions that will empower an organization (Cardus, n.d.). See Figure 11.

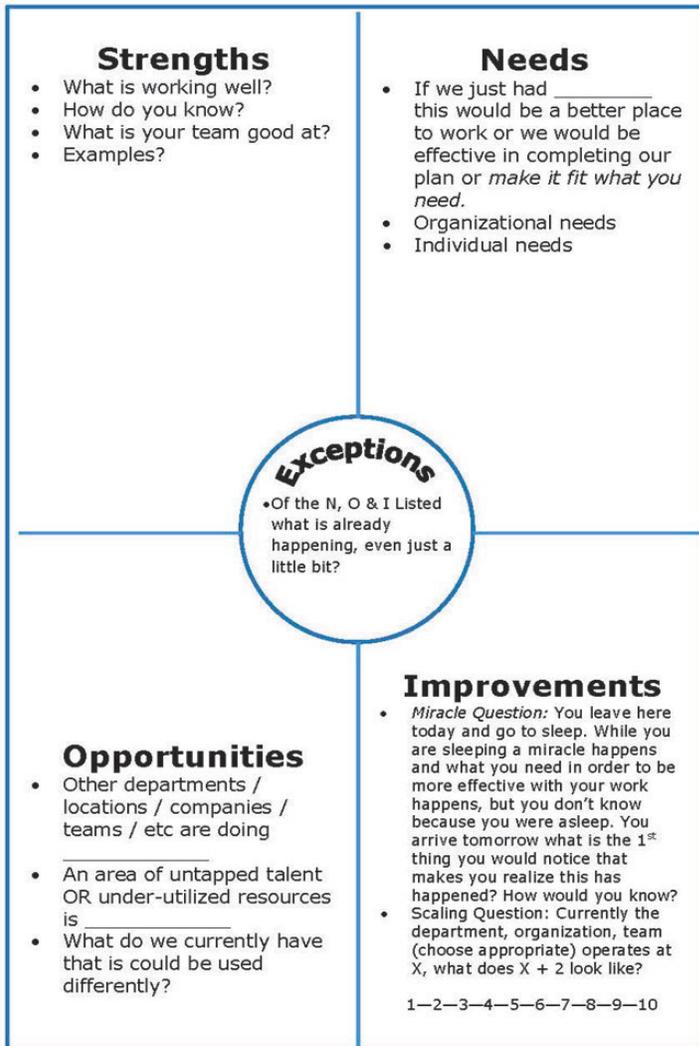


Figure 11. NOISE Analysis Diagram<sup>12</sup>

<sup>12</sup> A pictorial diagram of the NOISE Analysis. From *NOISE Analysis: An Alternative to SWOT* by M. Cardus, n.d., <https://mikecardus.com/noise-alternative-swot/> Used with permission.

The NOISE analysis is designed to produce strategic action steps from solution-driven questions (Cardus, n.d.). For this study, content in the NOISE Analysis Diagram (Figure 11) and the primary NOISE analysis questions listed below were considered in the research methodology and when analyzing the research findings and identifying potential solutions.

- Needs—What does OPRA leadership need to achieve their goals?
- Opportunities—How does OPRA become more aware of existing opportunities?
- Improvements—What immediate actions can OPRA leadership take to incorporate its needs, opportunities, and strengths?
- Strengths—Where does OPRA excel?
- Exceptions—What action is OPRA leadership already taking to address current needs, opportunities, improvements, and strengths? (Cardus, n.d.)

## Delta Model Analysis

Porter’s Five Forces analysis was also completed for Section 2 to present an assessment of the competitive environment within which OPRA operates. The Delta Model offers an alternative perspective to Porter’s Five Forces by focusing more on the customer and less on the competition (Somers, 2023.) The Delta Model offers a scale of customer loyalty, as shown below.

- *Cognitive loyalty* means customers are loyal based on rational decisions made with available information.
- *Affective loyalty* is earned by engendering customer feelings towards product or service offerings.
- *Conative loyalty* is the display of brand loyalty and commitment to repurchase.
- *Action loyalty* occurs when customers seek to remove barriers that may hinder repurchase(Hajipour & Esfahani, 2019).

The Delta Model is a tool to help increase customer loyalty to the level of action loyalty by focusing on customers. The model was created by Arnaldo Hax and is based on 10 principles he called “Haxioms” that focus on strategy, organization mentality, and customer interaction (Somers, 2023). Somers (2023) lists the 10 Haxioms:

1. The center of strategy is the customer.
2. You don’t win by beating the competition; you win by achieving customer bonding.
3. Strategy is not war; it is love.
4. A product-centric mentality is constraining; open your mindset to include the customers, the suppliers, and the complementors as your key constituencies.
5. Try to understand your customer deeply. Strategy is done one customer at a time.
6. Commodities only exist in the minds of the inept.
7. Strategy has two foundations: customer segmentation and customer value proposition and the firm as a bundle of competencies.
8. Reject the two truisms: “The customer is always right,” and “I know the customers’ needs and how to satisfy them.”
9. The strategic planning process is a dialogue among the firm’s key executives—seeking consensus on the organization’s direction.
10. Metrics are essential; experimentation is crucial. (Somers, 2023, 10 Haxioms section)

The 10 Haxioms provide a basis for three ways an organization can compete. Organizations can offer the best product, offer total solutions to the customer, or achieve system lock-in (Somers, 2023).

The researcher used the Delta Model as an alternate perspective to Porter’s Five Forces when considering the research methodology, analyzing research findings, and identifying potential solutions. Refer to Figure 12.

## The Delta Model - Strategic Positioning Options

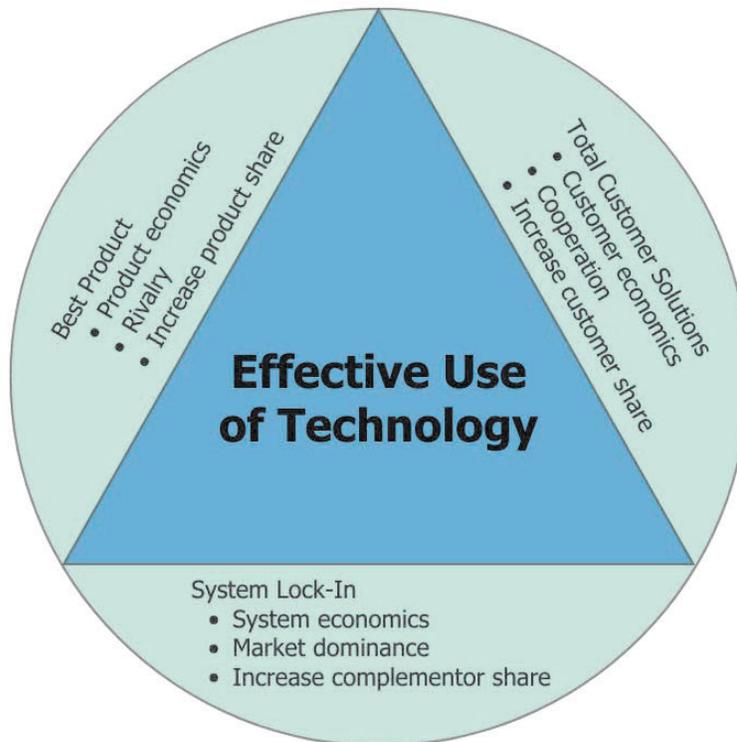


Figure 12. The Delta Model<sup>13</sup>

## McKinsey 7-S and Virtuous Business Model Analysis

Section 2 of this paper offered separate analyses of the OPRA organization utilizing the McKinsey 7-S Model (Galli, 2018) and the VBM (Brooker & Boyce, 2017). The separate analyses provided a holistic understanding of the organization’s operations, culture, and shared values within the VR industry and additional insights into the organization’s culture and core purpose of operations. Combining the two models creates a holistic evaluation tool for change in an organization whose operations are interdependent on another industry. Grouping the McKinsey 7-S Model operational elements of strategy, structure, and systems generates the economic capital of the VBM and retains elements of the Be, Know,

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<sup>13</sup> A diagram of the Delta Model. Adapted from “The Delta Model: How Arnaldo Hax Reprioritized Corporate Strategy” by M. Somers, 2023, <https://mitsloan.mit.edu/ideas-made-to-matter/delta-model-how-arnaldo-hax-reprioritized-corporate-strategy>

and Do structure (Brooker & Boyce, 2017; Galli, 2018). The McKinsey 7-S elements of staff, style, and skills form the cultural or spiritual capital of the VBM. Social capital becomes a new element provided by the VBM that the McKinsey 7-S does not include. This element is important to include as it considers OPRA’s relevant stakeholders such as member agencies, individuals with disabilities, state agencies, and business associates. Shared values become the central focus of all three grouped components. See Figure 13 for the McKinsey 7-S/VBM Combined Model.

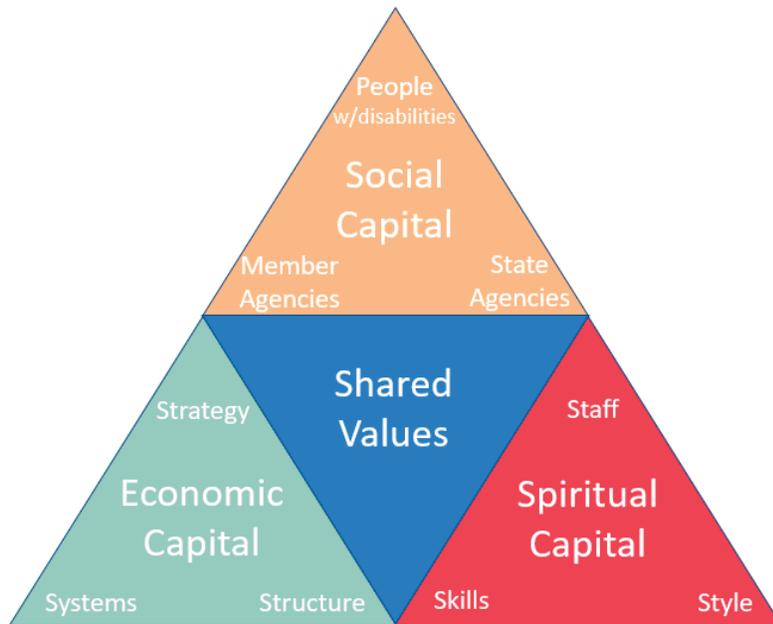


Figure 13. McKinsey 7-S and VBM Combined Model<sup>14</sup>

These combined frameworks create an alternative perspective viewing the research plan and identifying potential solutions. Economic capital, organization and industry culture, and social capital must be considered in data collection and analysis. Potential solutions must incorporate the shared values of the many stakeholders involved in OPRA leadership to truly increase its value in this space.

### Planned Inquiry

Further research into the specific impact the CESP has on the Ohio VR industry was required for OPRA leadership to identify ways to increase member value in the organization. Specifically, the comprehensive literature review highlighted the need for more information regarding the CESP efficacy and member CRP perspectives surrounding the CESP. The planned inquiry was designed to further answer the driving research question: *How can OPRA secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio VR industry to positively impact individuals with disabilities and employer workforce needs?*

The Indiana Wesleyan University Institutional Review Board (IRB) approved the research method of using secondary data provided by OPRA and conducting six interviews with employment specialist agencies to

<sup>14</sup> Adapted from “Change Management Models: A Comparative Analysis and Concerns” by B. J. Galli, 2018, *IEE Engineering Management Review*, 46(3), <https://doi.org/10.1109/EMR.2018.2866860> and “Virtuous Leaders and Organizations” by M. Brooker and J. W. Boyce, 2017, *The DeVoe Report*, <https://tinyurl.com/yfa4uzy6>.

gather primary data. See IRB approval notification in Appendix B. The secondary data consists of employment specialist qualifications and employment outcomes achieved and provides preliminary insight into the CESP efficacy. Interviewing member agencies about the effect of the CESP requirement on their agencies and the industry provides a more holistic assessment of the quantitative data.

## Research Methodology

This exploratory research studies the influence of the CESP credential in the VR industry to gain insights into opportunities for OPRA to provide more value to its stakeholders. There has yet to be a study conducted to show that an employment specialist with a CESP is more qualified to provide services than an employment specialist without it (T. Nelles, personal communication, July 17, 2023). A previous study produced inconclusive results (Riesen et al., 2023). An exploratory approach is supported by the lack of currently known information (Fife & Rodgers, 2022). The purpose is to discover and detect patterns (Fife & Rodgers, 2022). The mixed data research includes a dual approach of quantitative and qualitative data collection and thematic analysis to explore multiple avenues of discovering opportunities for OPRA leadership. A qualitative interview and a quantitative questionnaire provide two methods for assessing multiple facets of the same phenomena (Mulisa, 2022). This researcher chose to examine quantitative and qualitative data for a multiple perspective approach for the exploratory study.

## Research Method

An exploratory study is best suited to achieve the desired goal of gaining insight and laying the groundwork for later research (Haile, 2023). Accordingly, a multiple perspectives approach was used to collect qualitative data through interviews and examine quantitative data provided by OPRA leadership. Specifically, qualitative information was gathered from private agencies regarding their views of the impact of the credential on their agency and their local VR industry. The semi-structured questions were developed to examine OPRA's provider employment outcomes. Quantitative data aided in identifying themes for future research regarding the CESP credential's impact on employment outcomes.

## Data Sources and Collection Procedures

This mixed-methods research was conducted in two phases: reviewing a quantitative dataset and conducting interviews. These data sources and collection procedures are discussed below.

### *Quantitative Employment Outcomes Dataset*

**Data Collection Technique.** The collected data reflected employment outcomes data from April 1, 2023, through September 30, 2023, and the CESP status of the employment specialist producing the employment outcomes.

**Instrumentation.** The instrumentation given to OPRA leadership was a spreadsheet with instructions that agencies could download, fill out, and return to OPRA. OPRA leadership gave the researcher access to the collected data: the aggregate placement outcomes by employment specialists. For confidentiality reasons, this researcher's access to the data was limited to de-identified data where CRP names and employment specialist names are coded. This researcher did not have access to any direct identifiers of the CRPs or employment specialists.

The variables included the CESP status of each employee listed by CRP, the total number of placements by the employee, the average wage of placements by the employee, and the average hours worked for placements by the employee. The measurement scale of each variable is the following:

- CESP Status → Nominal
- Total Number of Placements → Ratio, Discrete
- Average Wage → Ratio, Continuous
- Average Hours → Ratio, Continuous

The dataset provided information on some key employment outcomes typically used to measure quality services, as identified in the literature review presented in Section 3.

As this dataset was provided by OPRA leadership, the researcher cannot attest to its reliability and validity. However, to better determine reliability and validity, the data could be repeated over similar time periods in the future.

**Ethical Factors Related to Participants and the Organization.** OPRA and the researcher maintained ethical boundaries in sharing the dataset collected and maintained by OPRA leadership. OPRA determined to maintain the participating CRPs' privacy when releasing the dataset to the researcher to safeguard against any semblance of antitrust, collusion, or proprietary information release.

**Population and Sampling.** The population for this dataset included CRPs who are members of the provider trade association OPRA. OPRA requested that each member agency fill out their spreadsheet during committee meetings, weekly all-member virtual meeting, and weekly newsletter. The voluntary sample includes data offered by member CRPs.

**Role of the Researcher.** The researcher did not play a role in the data collection process of the employment outcomes dataset. Refer to Appendix G.

### *Qualitative Interview Data*

**Data Collection Technique.** As approved by the IRB, the researcher conducted six semi-structured interviews. The questions used in the interviews are in Appendix C. The structured questions were chosen to gather an in-depth understanding of critical aspects of the interaction of the CESP credential with the Ohio VR industry, and a greater understanding of the role members feel OPRA should play in this interaction. Due to the study's exploratory nature, the final question was left open-ended to obtain more diverse insights. Data saturation is the point where new data does not bring more understanding of the phenomena (Mason, 2010). All six interviews were needed to reach data saturation.

**Data Organization Technique/Instrumentation.** This researcher was the primary data collection instrument. Six interviews were conducted over a three-week time period from June 24, 2024, through July 10, 2024. Participants joined a virtual Microsoft Teams meeting and completed a semi-structured interview with three structured questions plus a fourth question soliciting general thoughts on the CESP. The meetings were recorded and transcribed via Microsoft Teams and Microsoft Stream. The recordings and transcriptions were saved to a USB drive, which will reside in a locked safe in the researcher's home for three years. Interviewees were approved to participate in the interview by a person of authority within

their agency, and each interviewee provided personal consent to participate. The researcher organized data through notetaking during the interviews, reviewing recordings, and reading through transcriptions.

**Participants and Stakeholders.** Participants are employed by agencies that provide services to geographic regions throughout Ohio. The agencies represented a variety of sizes regarding the number of employees and the number of individuals served. Participants are from agencies that provide supported employment services and are required to have employment specialists obtain and maintain the CESP credential. OPRA leadership provided the participant's email address to the researcher. All participants identified by OPRA leadership responded to the researcher's outreach to participate in the study.

**Ethical Factors Related to Participants and the Organization.** Interview participants and their respective agencies are not named in this study for privacy protection and to encourage truthful, candid responses that may be unfavorable. All interview participants had approval from a person of authority within their agency to participate. Each participant signed an informed consent form (Appendix D) before participating in the interview. Interviewees did not receive any incentives or compensation for participating.

The Belmont Report notes three basic ethical principles of "respect for persons, beneficence, and justice" (Office for Human Research Protections, 2018, Basic Ethical Principles section). The researcher preserved respect for each participant through voluntary participation in interviews that could be ended at any time if the participant chose to do so. Beneficence was supported by maintaining participants' privacy, conducting the interviews conveniently through virtual video conferencing at the participants' convenience, and creating industry and topic-specific questions to minimize disclosure of proprietary agency information. The goals were to minimize risks to participants and maximize benefits to OPRA and OPRA's member agencies.

**Population and Sampling.** The population for this study included CRPs who are members of OPRA and provide the supported employment-job development service. Purposive sampling selects participants with experience related to the subject of interest (Ellis, 2021). Selecting participants with different experiences provides better representation and scope for the study (Ellis, 2021). Purposive sampling can provide depth to the research while limiting the resources needed to conduct the study (Campbell et al., 2020). Strategies using this sampling method include selecting participants who have distinct and notable views on the topic of interest (Campbell et al., 2020). The criteria for purposive sampling selection included different-sized agencies located in different geographic regions of Ohio that offer the supported employment service, which requires the CESP. To ensure experience with the subject of interest, only those agencies providing supported employment services were included. purposive sampling of six CRP representatives was selected to meet the above criteria.

**Role of the Researcher.** The researcher is an employee of a private CRP in Ohio, which is a member of OPRA. The researcher has 28 years of experience working in Ohio's VR field and five years of experience interacting with OPRA as a member. As an active participant in OPRA activities, the researcher is well-acquainted with many of OPRA's members. Some participants knew and were known to the researcher before being interviewed. They were made aware of who would be interviewing them before participating. Prior to commencing the study, the researcher considered the nuanced nature of the actor and interviewer role (Collins et al., 2022). The researcher asked follow-up questions and encouraged further insight from each interviewee as warranted to clarify responses or to obtain more details. The researcher emphasized their role as an interviewer during the interviews to minimize any impact the researcher might have as an actor.

## Research Analysis

For consistency, thematic analysis was applied to all data collected under the mixed methods design. While thematic analysis is typically considered a qualitative analysis approach, this process of examining content for themes can be applied to quantitative or qualitative data (Kogen, 2024). Thematic analysis that is used for quantitative or qualitative data must impose high levels of quality reflection (Braun & Clarke, 2021). Using thematic analysis with quantitative and qualitative data can help to connect disparate types of information (Braun & Clarke, 2021). Themes differ from descriptive summaries by going beyond description and identifying “patterns of shared meaning” (Ayre & McCaffery, 2022, Which Analytical Approach section). As such, the same principal steps for analyzing the quantitative data were followed for the qualitative data analysis and then combining the datasets. These steps involve fully immersing in the data to initiate discoveries, then reviewing the data to create codes for a broad range of topics and subsequently examining these codes to develop categories later grouped into themes (Ong et al., 2024).

### Employment Outcomes Data Analysis

The dataset provided by OPRA leadership contained information from four of OPRA’s member agencies and represented a total of 31 employment specialists. Of the 31 employment specialists, 15 did not have a CESP, and 16 employment specialists did. Agencies were coded by using an assigned number. Employment specialists were also assigned a code. The researcher received the dataset with the CRP and employment specialist codes already in place. The dataset was in an Excel file. The variables for each employment specialist included CESP status, total number of placements, average starting wage for placements, and average weekly hours per placement. The period of time that the dataset represented was April 1, 2023, through September 30, 2023.

Each variable was divided into two groups: those with their CESP and those without a CESP. These two groups are distinguished in the following analysis using the terms “Yes CESP” and “No CESP” respectively.

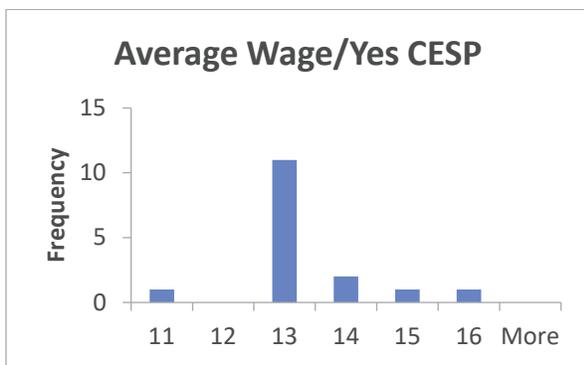
To review, this study is exploratory. The dataset provided was based on voluntary sampling and is small. As such, the data analysis includes numerical and graphical descriptions of the data to identify patterns. Confirmatory data analysis, such as hypothesis testing, is not included to align with accepted practices in exploratory data analysis (Fife & Rodgers, 2022). As such, the exploratory data was reviewed through the lenses of distribution, measures of central tendency, and measures of variability to look for themes. Histograms were created in Microsoft Excel to provide a graphical description of data. Histograms visually display the distribution of data, including peakedness, skewness, and range on a number line (Cooksey, 2020). Boxplots are another graphical description created in Microsoft Excel for each variable. Boxplots provide visual displays of the median, interquartile range, minimum, maximum, and sometimes outliers (Cooksey, 2020). Measures of central tendency provide information about where observations are occurring most often and are measured using the mean, median, and mode (Cooksey, 2020). Measures of variability include the range and interquartile range when the median is used for the measure of central tendency and include the variance and standard deviation when the mean is used for the measure of central tendency (Cooksey, 2020). Numerical descriptions, including measures of central tendency and measures of variability, were created using the Excel add-in Data Analysis feature. Following the steps of thematic analysis, the researcher first familiarized herself with the data through various descriptive statistics techniques. The graphical (Figures F1 and F2) and numerical descriptive statistics (Tables F1 and F2) for each variable are located in Appendix F. Once descriptive statistics were found, codes were

developed that were then categorized and finally grouped into themes. Two themes emerged from this analysis.

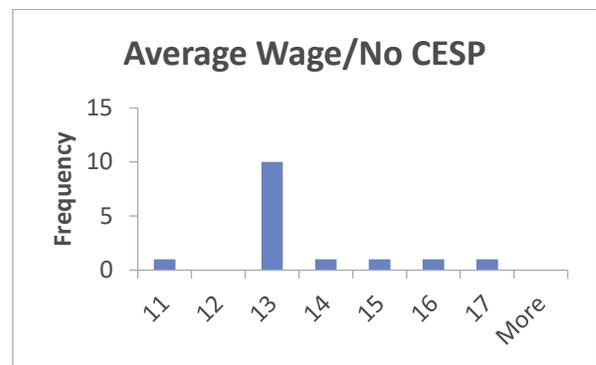
### **Theme 1: Employment Outcomes Share Similarities**

Some employment outcome data showed a pattern of similarity. Average wages and average hours showed a pattern of similarity between having and not having the CESP. Graphically, the data distributions appear similar. The peak and spread of data were nearly identical. The range of data for the comparable groups also demonstrated patterns of similarities.

Figures 14 and 15 comparatively display the histograms for average starting wage for placements by employment specialists with and without a CESP, respectively.

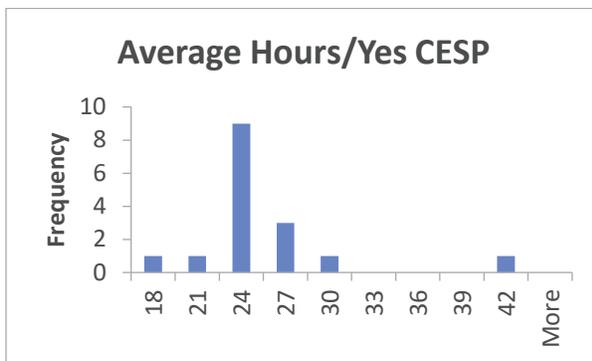


**Figure 14.** Average Starting Wages by Specialists With a CESP

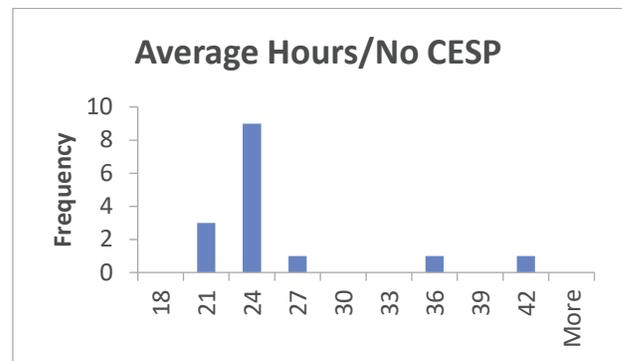


**Figure 15.** Average Starting Wages by Specialists Without a CESP

A comparison of the histograms for average weekly hours for placements by employment specialists with and without a CESP is shown in Figures 16 and 17, respectively.



**Figure 16.** Average Weekly by Specialists With a CESP



**Figure 17.** Average Weekly by Specialists Without a CESP

The pattern of similarities was also observed in the numerical descriptions of the data. Notably, measures of central tendency are quite similar to measures of variability and shape for those with and without the CESP. This pattern of similarity is noted in the numerical descriptions of both employment outcome measures in Table 3.

	<i>Average Wage</i>		<i>Average Hours</i>	
	<i>Yes CESP</i>	<i>No CESP</i>	<i>Yes CESP</i>	<i>No CESP</i>
Mean	\$13.06	\$13.25	23.70	24.10
Standard Error	0.27	0.41	1.27	1.53
Median	12.97	12.97	21.7	21.7
Mode	12.97	12.97	21.7	21.7
Standard Deviation	1.0832	1.5911	5.0685	5.9072
Sample Variance	1.1733	2.5316	25.6897	34.8953
Kurtosis	3.8052	1.8256	7.2982	3.9474
Skewness	-0.7756	0.6583	2.3795	2.1422
Range	5.09	6.9	22.8	21.4
Minimum	10.1	10.1	17.2	18.6
Maximum	15.19	17	40	40
Sum	208.92	198.68	379.24	361.47
Count	16	15	16	15

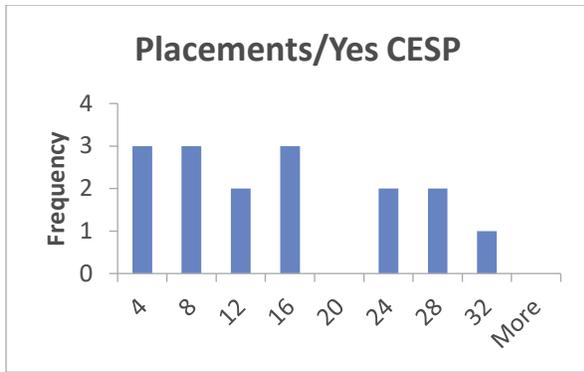
**Table 3.** *Descriptive Statistics for Average Wage and Hours by Specialists' CESP Status*

This pattern of similarity may suggest that the CESP credential does not influence the employment factors of starting wage and weekly hours for individuals with disabilities. These employment characteristics were noted in the Section 3 literature review as critical for assessing the quality of employment for individuals receiving VR assistance. The trend in commonality should not be considered absolute and widely applicable. The trend is an identified theme found when conducting thematic analysis and is an area for future investigation.

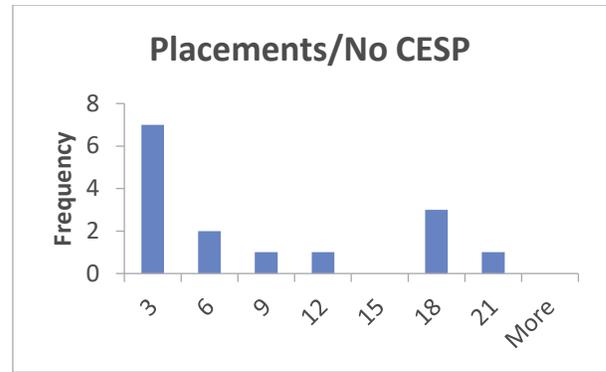
### ***Theme 2: Employment Outcomes Diverge***

The total number of placements showed a divergence pattern between having and not having the CESP. Graphically, the distributions of data appear different in shape, peak and spread of data.

A comparison of the histograms for the total number of placements by employment specialists with and without a CESP. The histograms show very different shapes in distribution shape, peakedness, and range, as seen in Figures 18 and 19.

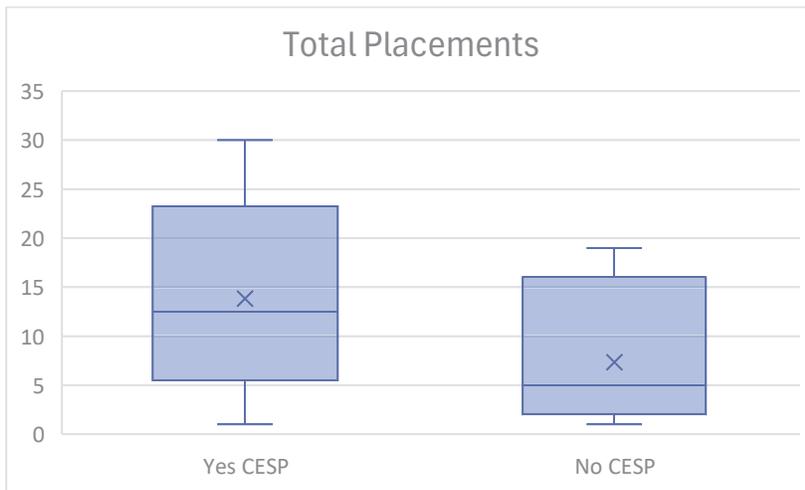


**Figure 18.** Total Placements by Specialists With a CESP



**Figure 19.** Total Placements by Specialists Without a CESP

A comparison of boxplots displayed differences in the interquartile range, where the middle 50% of observations were grouped on the number line. The different ranges of the interquartile boxes and the shift in boxes on the number line suggest that the data differs. See Figure 20 and Table 4.



**Figure 20.** Placements by Specialists' CESP Status Boxplot

Five-Number Summary	Yes CESP	No CESP
Minimum	1	1
First Quartile	5	2
Median	12.5	5
Third Quartile	24	16
Maximum	30	19

**Table 4.** Summary of Placements by Specialists' CESP Status

Finally, numerical descriptions of the data also support the theme of divergence. Central tendency and variation measures suggest differences in the two data groups, as shown in Table 5.

<i>Total Placements</i>	<i>Yes CESP</i>	<i>No CESP</i>
Mean	13.81	7.33
Standard Error	2.35	1.72
Median	12.5	5
Mode	11	2
Standard Deviation	9.3895	6.6619
Sample Variance	88.1625	44.3810
Kurtosis	-1.1009	-1.1895
Skewness	0.3681	0.6978
Range	29	18
Minimum	1	1
Maximum	30	19
Sum	221	110
Count	16	15

**Table 5.** *Descriptive Statistics for Placements by Specialists’ CESP Status*

A pattern of difference suggests that the CESP credential may influence the number of individuals for whom an employment specialist finds employment. The trend in difference is noted in this analysis as an identified theme. Because inferential statistics and confirmatory data analysis techniques were not conducted, it is inappropriate to conclude that there is a significant difference or that the CESP is the cause of the difference. Using thematic analysis, the difference is identified as a pattern and suggests an area for further investigation.

### **Semi-Structured Interviews: Data Analysis**

Six interviews were conducted via Microsoft Teams over the three-week period of June 24, 2024, through July 10, 2024. Meetings were conducted with cameras on for both the participant and researcher. All meetings were recorded and transcribed. To protect privacy, the researcher assigned each interviewee a number. After conducting all interviews, the researcher watched all six recordings to pursue data immersion. Reviewing recordings is preferred to reading transcripts for the data immersion step in thematic analysis as it allows the researcher to better observe the information with the nuances of context in tone, body language, and conversational pattern (Green et al., 2007). The researcher then reviewed transcriptions to create a thorough list of topics. The researcher reviewed transcriptions again to group topics into categories. Finally, the researcher reflected upon the categories, the recordings, and the transcriptions to develop themes.

### ***Theme 3: Requirements to Initially Earn the CESP are Burdensome***

The majority of respondents mentioned the one-year of work experience that is required before qualifying to take the CESP exam as a hardship to maintain a workforce with CESP credentials. Participant 2 commented, “The first barrier is finding staff who even have a CESP, and the second barrier then becomes, okay, we’re hiring people without it, and we have to wait oftentimes up to a year before they can apply to take the exam.” Test anxiety created stress in employees, and some employees failed the test. Participant

1 stated, "People are excited when they get it, but there's a lot of anxiety for testing too." Participant 4 noted, "Sometimes the testing, from my understanding, is too difficult. . . . So I have people who are really good at working with people with disabilities, and they've been doing it for many years, but they get caught up, and they're not good test takers. So, therefore, they can't pass that test to get certified." OPRA-hosted study sessions for the exam were suggested. Respondents also indicated a desire that OPRA advocate to APSE to reduce the work experience requirement.

#### ***Theme 4: Training Requirements to Renew the CESP are Difficult to Fulfill***

The availability of applicable training was identified as a barrier to renewing the CESP. Allocating staff time to fulfill the 36 hours of required ongoing training instead of providing services was also mentioned as a struggle. One respondent noted that quality training was particularly hard to find. Participant 3 stated, "The CEUs are a bit of a challenge, especially when you wait to the very last minute to try to cram all 36 in." Suggestions for OPRA's role included offering applicable training and coordinating member-led training. One respondent also added that OPRA should advocate to OOD and other state agencies to provide training that is already approved for CESP training credit.

#### ***Theme 5: OOD Practices Hinder the Supported Employment Service***

While OOD requires the CESP credential to provide supported employment services, its practices hinder service provision despite the credential. OOD employee inconsistency in determining who is eligible for supported employment versus job development diminished the value and need for the CESP. Actual implementation and coordination of supported employment services between OOD and other state agencies does not reflect how OOD presents how this service will be delivered, causing confusion and frustration with this service. Another respondent notes that the disobliging manner of implementation of the original CESP requirement by OOD leaders continues to devalue the credential itself. One respondent suggested that OPRA advocate getting rid of the CESP requirement.

#### ***Theme 6: Inconsistent Opinion Exists Regarding the View of the CESP***

Another area that presented dichotomous opinion was that on the value the CESP brings to the VR field. Some respondents adamantly claimed the CESP has no value and makes no difference in services or employment specialists. Participant 5 noted, "I don't see any value added to it. It just stresses staff out." Participant 1 stated, "I wish we - I - could say that it's changing and making our field more professional, but, unfortunately, it's just something that people get." Participant 2 said, "In terms of the impact it's had on VR in general, I don't know that it does."

Others steadfastly declared that the CESP allows them to view cases with more professional expertise and gives employment specialists credibility, granting them an easier avenue to build rapport with industry stakeholders. Participant 4 commented, "You can tell it has made a difference in the way she views things and how she interacts in the whole, the whole process of helping somebody find that job that's the right fit for them." Participant 3 said, "We have a very good reputation in the industry, but I just think it adds an extra layer to our qualifications."

### ***Theme 7: Inconsistent Opinion Exists Regarding the CESP***

Respondents were very split in their opinion of the CESP as a financial burden or financial opportunity. Some respondents referenced their credentialed staff as creating opportunities to provide more services and expand geographically, thus creating growth potential for the CRP. Participant 6 stated, “It's increased our services that we've been able to provide also. Prior to me getting that, we were not able to provide those services.” Participant 4 offered, “Our one staff member who has their CESP has allowed us to help more of our clients to find community jobs.”

Other respondents found the cost of obtaining and maintaining staff credentials too high and did not see a return on their investment. Costs included the exam and staff time to study for and take the exam, as well as the cost of training and staff time costs to attend training. One respondent noted that the test fee added to already high turnover costs. Respondents suggested that OPRA leadership should advocate for reimbursement for testing fees and staff time from OOD. Another suggestion encouraged OPRA leaders to advocate for a higher reimbursement fee for supported employment services from OOD to better cover the additional costs to agencies for maintaining a workforce with this credential.

### ***Theme 8: Member Agencies Have a Wide Diversity of Experiences With the CESP***

Through all the responses provided, the diversity of experiences that member agencies have had with the CESP was remarkable. The theme of training requirements being difficult to meet is the only theme with unanimous support from all respondents. None of the other themes identified from the qualitative interviews had unanimous support. Interestingly, when responses differed, the differences were in stark opposition.

This study created codes and developed themes from the semi-structured interviews conducted with representatives from 6 agencies that provide supported employment services in various geographic locations throughout Ohio and from various sizes of CRPs. Appendix H provides details supporting the thematic analysis.

## **Research Findings**

This study explored how OPRA can secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio vocational rehabilitation industry to positively impact individuals with disabilities and employer workforce needs. The exploratory research included a mixed-methods research design, with analysis of the quantitative dataset provided by OPRA and qualitative data collected through semi-structured interviews. Thematic analysis was applied to both data sets in light of the exploratory nature of each. Thematic analysis was then applied to combine the datasets to identify further themes. Eight themes were identified:

- Theme 1: Employment outcomes share similarities.
- Theme 2: Employment outcomes diverge.
- Theme 3: Requirements to initially earn the CESP are burdensome.
- Theme 4: Training requirements to renew the CESP are difficult to fulfill.
- Theme 5: OOD practices hinder the supported employment service, undermining the CESP.

- Theme 6: Inconsistent opinion exists regarding the view of the CESP as meaningful or meaningless.
- Theme 7: Inconsistent opinion exists regarding the CESP as a cost to a CRP or an avenue for growth.
- Theme 8: Member agencies have diverse experiences with the CESP.

The researcher reviewed the descriptive statistics and interview transcriptions to view the combined data as a whole. A new list of topics was developed. The researcher reviewed data again to group topics into categories. Finally, the researcher reflected upon the categories and the data to develop themes. Aggregate research findings were then identified.

### **Finding 1: The CESP: Indicator of Quality Employment Outcomes**

Measures of quality discussed in the literature review include tangible markers like wages and hours (Krause et al., 2018) and intangible markers such as an individual’s job satisfaction and job search experience (Ikutegbe et al., 2023). The descriptive data showed a pattern of differences in the total number of placements for employment specialists with their CESP. However, average hours and average wages displayed a pattern of similarity. Likewise, some respondents felt that employment specialists with their CESP represented a higher quality of service, whereas others felt there was no difference. In light of the mixed trends discovered in the thematic analysis, intangible components may be a better-quality measure for employment specialists than tangible ones. While wage and hour data are more readily accessible and offer objectiveness, these measures do not account for individual choice in selecting an employment position and factors that may affect this decision that are outside an employment specialist’s control.

### **Finding 2: The Cost-Benefit of the CESP Varies by CRP**

Respondents were split on their opinion of the CESP as a financial advantage or burden. The OPRA dataset supports this disparity. Notably, some employment specialists with their CESP in the OPRA dataset had one placement, while another had 29 placements in the same time period. This disparity in the placements count would directly impact an agency’s cost and revenue comparison. Participant 6 mentioned, “In a rural county like ours, we only have a handful of individuals that come through with job development.” The literature review considered the impact of credentials from the CRP perspective. The literature review addressed the additional cost of credentialing but argued that the credential leads to a more effective workforce, reduced turnover, and greater workforce diversity (Kim, 2020; Rios et al., 2018). Some respondents noted increased effectiveness with regard to employment specialists, with CESP’s being seen as credible and building rapport. Others commented that employing staff with CESP’s provides opportunities for growth for the CRP. However, one respondent questioned whether the CESP reduces turnover or adds to the cost of turnover. A break-even analysis is provided below to provide clarity on this finding.

#### ***Cost of CESP***

Several costs can be attributed to the CESP credential. The cost of the test, staff time, and the cost of continued training all add up to a significant cost for a CRP to maintain a credentialed staff. Each cost is examined below.

The total cost to apply for and take the exam is \$199 (Association for Persons Supporting Employment First, n.d.-c, para. 1). The test only needs to be taken once.

To estimate the cost of staff time, OOD fees for job development and supported employment job development are based on the assumption that employment specialists are paid \$20.36 and cost a CRP \$58.59 per hour when considering benefits, supervision, and non-service-related activities (Public Consulting Group, Inc., 2016). One interview respondent stated she estimates that staff use four hours to study for the exam and four hours to take the exam. The CESP requires an additional 36 hours of training to be completed every three years to renew the credential (Association for Persons Supporting Employment First, n.d.-d). Using the \$58.59 as an estimate of CRP cost for one hour of employee time and 44 hours as an estimate of time needed to obtain and maintain the CESP over three years, the cost of staff time is \$2,577.96 every three years:

4 hours of study + 4 hours to take test + 36 hours of CEUs = 44 staff hours  
44 hours X \$58.59 cost to CRP per staff hour = \$2,577.96

Up to 20 hours of training can be earned from internal training from the employment specialist's CRP (Association for Persons Supporting Employment First, n.d.-e), creating little to no cost for the CRP. The Association for Persons Supporting Employment First (n.d.-f), which created the CESP, provides multiple opportunities for free training with a paid membership. Membership for a single staff member is \$180 per year (Association for Persons Supporting Employment First, n.d.-f) or \$540 for three years.

Considering initial testing, staff time, and continued training, the CRP cost is \$3,316.96 every three years or an estimated \$1,105.65 annualized:

\$199 application and test expense + \$2,577.96 staff time expense + \$540 training expense = \$3,316.96  
\$3,316.96 total expense over 3 years / 3 years = \$1,105.65 annual expense

### ***Revenue for Supported Employment***

Having staff with a CESP allows a CRP to provide supported employment services. The current OOD Provider Manual pays agencies a total of \$5,333.70 for the supported employment service and a total of \$4,268.00 for the comparable job development service (Opportunities for Ohioans with Disabilities Agency, 2022c). The difference between the two services is \$1,065.70. Placing two individuals receiving supported employment nets an additional \$2,131.40 in revenue for the CRP.

### ***CESP Break-Even Analysis***

A CRP needs an employment specialist to place two individuals receiving supported employment to fully break even with respect to investing in CESP credentials for staff:

\$1,065.70 additional amount for supported employment – \$1,105.65 annualized cost of CESP = - \$39.95 net loss

\$2,131.40 additional amount for 2 placements - \$1,105.65 annualized cost of CESP = \$1,025.75 net gain

From the data collected in the OPRA dataset, one employment specialist with a CESP had one total placement in the six-month period the data was collected. This CRP may not see a cost-benefit to maintaining CESP credentials for staff unless at least one more placement is obtained for the year. The variation in CRP size, service mix, and geographic location can impact a CRP's ability to break even on its credential investment, leading to opposing views on whether the investment pays off.

### **Finding 3: CRPs Face Varying Barriers**

Themes 3 and 4 are associated with obtaining and maintaining the CESP credential. The literature review examined best practices in professional development. Continuous learning is a necessary step in the Coalition Model for Professional Development (Youmans & Godden, 2022). The barrier of applicable and available training may be hindering employment specialists in their efforts to grow professionally and contributing to feelings of stress and anxiety. Notably, the Coalition Model recommends ongoing, relevant, and action-oriented learning opportunities for professional growth (Youmans & Godden, 2022). The interviews revealed that these opportunities are currently missing from the Ohio VR industry.

### **Finding 4: Interactions With OOD Negatively Impact Views on the CESP**

Theme 5 addresses the feelings towards OOD, the role OOD plays in services, and potential advocacy efforts by OPRA leadership. The literature review noted that Ohio's CESP requirement is unique in that employment specialists are mandated to have the credential to provide supported employment services. The CESP is the only recognized credential allowing supported employment to be provided. The very narrow qualification contrasts with how individuals are determined to receive supported employment. While general guidelines exist, an interview respondent commented that OOD VR counselors ultimately decide, based on their expertise, who should receive the supported employment service that requires a CESP and who should receive the comparable job development service that does not require the CESP. The variability in making this decision among counselors was noted as a key factor in devaluing the stringent state qualification. The literature review also discussed best practices in lobbying or advocacy efforts. Best practices in advocating include ensuring the greater good of society is advanced, responding to stakeholder needs and perspectives, and supporting quality society values (Bauer, 2014). Keeping these principles in mind, best practices in advocacy are founded on ethical principles and consider the impact on internal and external stakeholders (Bauer, 2014).

### **Finding 5: The CESP Credential Positively Influences Employment Specialists**

Theme 6 relates to the meaningfulness of the CESP credential. The literature review considered the impact of credentials from the credential holder's perspective. The literature review remarked that credential holders have increased job satisfaction and increased employability (Ostrow et al., 2022). Multiple respondents noted that employment specialists are pleased when they pass the CESP exam and earn the credential. Interestingly, one respondent stated that finding applicants who have the CESP is difficult. This might indicate that employment specialists with a CESP have more employment opportunities in the VR field.

### **Finding 6: The Dichotomy of Opinions Suggests an Opportunity**

Theme 8 is the diversity of experiences that agencies have when interacting with the CESP. This variety is important to note when considering the driving research question and OPRA leadership's desire to

increase value to member agencies. Satisfaction with OPRA leadership’s current advocacy efforts was noted by respondents even while suggestions for future advocacy efforts were named. The literature review considers several benchmarking activities for trade associations that encourage the cultivation of understanding as a basis for strategic positioning. Trade association leaders must accept new data to encourage dialogue and drive action (Miller, 2023). Trade association leaders need to foster professional development opportunities and influence developments in the industry (McKinley Advisors, 2022). Best practices utilize collaboration, empathy, and trust (Doherty, 2004) to create a common goal despite diversity in stakeholder needs.

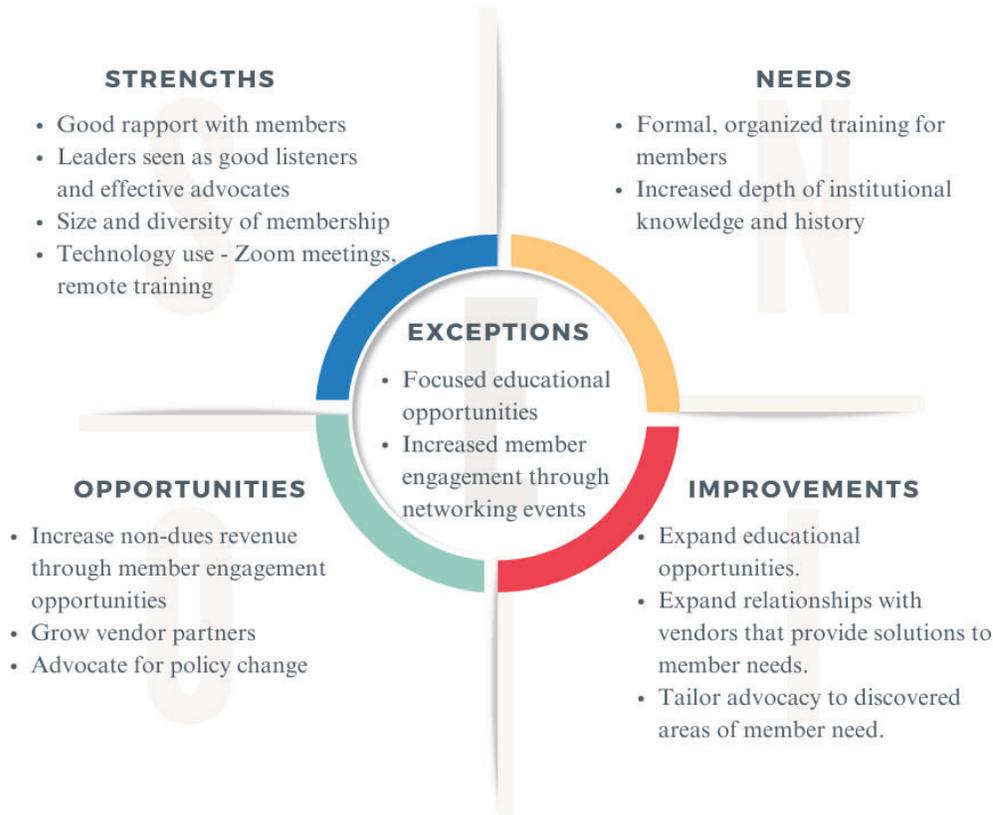
The exploratory study design was chosen specifically due to the amount of unknown knowledge regarding the CESP credential and its use in Ohio. OPRA leadership had identified that the current use of the CESP in Ohio was problematic. OPRA leadership desired to use this issue as an opportunity to increase member value by seeking ways to effect change in employment specialist credentials. The themes above offer insights into specific areas in which OPRA leadership can positively impact stakeholders and increase value.

### **Identification of a Multiple Solutions Framework**

The following section uses the proposed multiple perspectives frameworks discussed earlier in Section 4 to consider the research findings and the driving research question to form potential actionable solutions for OPRA leadership.

### **NOISE Analysis**

Figure 21 represents the NOISE analysis. It shows the synthesis of information from the literature review and the mixed-methods research resulting in identifying needs, opportunities, improvements, strengths, and exceptions.



**Figure 21.** Multiple Solutions Framework NOISE Analysis<sup>15</sup>

Potential solutions produced through the NOISE Analysis are the following:

- 1) OPRA leadership can fill the void of CESP testing prep by creating study sessions and mentoring opportunities for members.
- 2) OPRA leadership can fill the void of relevant training.
- 3) OPRA leadership can advocate to OOD leaders to inform them of the lingering effects of the original CESP requirement implementation, the effect of inconsistent determination of services, and the ongoing cost of the CESP for CRPs.
- 4) OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.

## Delta Model Analysis

Utilizing the Delta Model Framework, potential solutions to the proposed areas of improvement are created. The Delta Model strives to achieve increased loyalty through a customer-focused strategic position. Table 6 shows the three strategic positions the Delta Model strives to achieve, along with the scope, scale, and bonding of each.

<sup>15</sup> Adapted from *NOISE Analysis: An Alternative to SWOT* by M. Cardus, n.d., <https://mikecardus.com/noise-alternative-swot/>

	Best Product	Customer Solutions	System Lock-In
Scope	Defeatured ↔ Full-featured Low cost      Differentiated	Broad Product Range: <ul style="list-style-type: none"> <li>• Bundling</li> <li>• Joint development</li> <li>• Outsourcing</li> </ul>	Nurturing Complementors: <ul style="list-style-type: none"> <li>• Variety and number</li> <li>• Open architecture</li> </ul>
Scale	Product: <ul style="list-style-type: none"> <li>• Market share</li> </ul>	Customer: <ul style="list-style-type: none"> <li>• Customer share</li> </ul>	System: <ul style="list-style-type: none"> <li>• Complementor share</li> </ul>
Bonding	Link to Product: <ul style="list-style-type: none"> <li>• First to market</li> <li>• Dominant design</li> </ul>	Link to Customers: <ul style="list-style-type: none"> <li>• Customer lock-in</li> <li>• Learning</li> <li>• Customization</li> </ul>	Link to System: <ul style="list-style-type: none"> <li>• Competitor lock-out</li> <li>• Proprietary standards</li> </ul>

**Table 6.** *Characteristics of Three Options for Strategic Positioning*<sup>16</sup>

Using the Delta Model’s focus on customers, potential solutions are provided in Table 7, categorized by each solution’s strategic positioning.

Strategic Position	Potential Solution
Best Product	OPRA leadership advocate to OOD regarding the lingering effects of the original CESP requirement implementation, the effect of inconsistent determination of services, and the ongoing cost of the CESP for CRPs.
	OPRA leadership offers one-day training on topics related to the CESP.
Customer Solutions	OPRA leadership offers a CESP training track at its semi-annual conferences.
	OPRA leadership coordinates member-led training, increasing community and workforce development.
	OPRA leadership works with member agencies to use the CESP to advance professionalism in VR.
System Lock-In	OPRA leadership brings in training providers as Associate Members to provide CEU trainings.
	OPRA leadership invites training organizations to offer the 32-hour required intensive training that allows CESP applicants to apply after nine months of work experience instead of one year.
	OPRA leadership forms a working relationship with APSE to better understand application, training, and renewal requirements to better inform and educate member agencies.

**Table 7.** *Potential Solutions Using the Delta Model*<sup>17</sup>

<sup>16</sup> Adapted from “Characteristics of Three Options for Strategic Positioning,” in *The Delta Model: Adaptive Management for a Changing World* by A. C. Hax & D. L. Wilde II, 1999, <https://tinyurl.com/bdfsxyak>

<sup>17</sup> Ibid.

Using a customer-centric perspective, the Delta Model drives organizations to one of three strategic positions: best product, total customer solutions, and system lock-in (Hax & Wilde, 1999). The potential solutions created considered the literature review and research analysis from the perspective of the Delta Model framework.

## McKinsey 7-S/VBM Combined Model Analysis

While any problem has multiple potential solutions, organizations need to ensure that potential solutions align with the organization's mission and values. The McKinsey 7-S/VBM Combined Model is well-suited to assess alignment with organizational business practices, culture, stakeholder interactions, and shared values.

From the NOISE Analysis and Delta Model Analysis, the following potential solutions were identified:

1. OPRA leadership can fill the void of CESP testing prep by creating study sessions and mentoring opportunities for members.
2. OPRA leadership can advocate to OOD leaders to inform them of the lingering effects of the original CESP requirement implementation, the effect of inconsistent determination of services, and the ongoing cost of the CESP for CRPs.
3. OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.
4. OPRA leadership offers one-day training on topics related to the CESP.
5. OPRA leadership offers a CESP training track at its semi-annual conferences.
6. OPRA leadership coordinates member-led training, increasing community and workforce development.
7. OPRA leadership works with member agencies to find ways of using the CESP to advance the industry.
8. OPRA leadership brings in training providers as Associate Members to provide CEU trainings.
9. OPRA leadership invites training organizations to various areas of Ohio to offer the 32-hour required intensive training that allows CESP applicants to apply after nine months of work experience instead of one year.
10. OPRA leadership forms a working relationship with APSE to better understand application requirements, training requirements, and renewal requirements to inform and educate member agencies and improve opinions of the CESP in Ohio.

For this analysis, each potential solution will be scored based on its adherence to the specific component of the McKinsey 7-S/VBM Combined Model:

- Strategy: Using the values listed in OPRA's 2022 Strategic Plan of community, advocacy, information, and resources (S. Marks, personal communication, March 29, 2023), one point is assigned for each value the potential solution demonstrates.
- Structure: One point is assigned if the solution aligns with this value.
- Systems: One point is assigned if the solution aligns with this value.
- Staff: One point is assigned if the solution can be completed with current staff.
- Skills: One point is assigned if the solution can be completed with current skills.

- Style: One point is assigned if the solution aligns with this value.
- Social Capital: Using the VBM principles of authenticity, innovation, and synergy (Brooks & Boyce, 2017), one point is assigned for each value the potential solution demonstrates.
- Shared Values: One point is assigned for each stakeholder impacted positively by this solution, including individuals with disabilities, employment specialists, agency associate members, employers, the state VR agency, and OPRA.

Table 8 shows how potential solutions align with OPRA leadership’s economic capital, spiritual capital, social capital, and shared values.

Potential Solution	Economic Capital			Spiritual Capital			Social Capital	Shared Values	Total
	Strategy	Structure	Systems	Staff	Skills	Style			
1	2	0	0	0	0	0	0	2	4
2	2	1	1	1	1	1	1	1	9
3	3	1	1	1	1	1	2	5	15
4	1	1	1	1	0	1	2	4	11
5	3	1	1	1	1	0	3	4	14
6	2	0	0	0	1	0	2	3	8
7	2	1	0	1	1	1	2	5	13
8	2	1	1	1	1	1	1	2	10
9	2	0	0	1	1	1	2	2	9
10	3	1	1	1	1	1	1	3	12

**Table 8.** Ranking Potential Solutions Using the McKinsey 7-S/VBM Combined Model

Using multiple perspectives, several potential solutions were identified as actions to implement from the NOISE Analysis, as strategic positions for a customer-focused organization, and as aligned with OPRA values. These potential solutions with the five highest alignment scores will next be assessed for practicality and viability.

### Alternative Solutions Explored

Five potential solutions have been identified based on the multiple perspective frameworks. The implications and viability of each solution will now be evaluated.

Five potential solutions were identified:

- OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.
- OPRA leadership offers a CESP training track at its semi-annual conferences.
- OPRA leadership works with member agencies to find ways of using the CESP to advance the industry.
- OPRA leadership forms a working relationship with APSE to better understand application requirements, training requirements, and renewal requirements to better inform and educate member agencies and improve opinion of the CESP in Ohio.
- OPRA leadership offers one-day training on topics related to the CESP.

## Potential Solutions Explored

### *Potential Solution 1*

OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.

**Research and Literature Support for Solution.** The research identified themes of mixed experiences with the CESP. The literature review found that successful coalitions focus on solutions that benefit everyone and are grounded in empathy, trust, and a desire to understand (Doherty, 2004). The literature review also suggests several benefits to industries that institute credentialing programs, such as reduced turnover (Kim, 2020) and increased diversity (Kim, 2020; Rios et al., 2018). With OPRA leadership-led discussions to foster greater awareness and understanding, a more accurate picture of common industry goals can be created.

**Potential Implications.** Potential advantages to this solution include increasing member appreciation for OPRA through the creation of a greater sense of community from discussions and a higher level of understanding of the effect of the CESP requirement across the Ohio VR industry. Potential disadvantages include no impact on members' feelings towards OPRA or increased tension among members as those who have had negative experiences discover that some of their peers have financially gained from the CESP requirement. The financial cost to host discussions is minimal as OPRA hosts similar periodic, topic-specific discussions already. The cost would be in staff time to set up and host the discussion and then review information from the discussion. There is no direct financial benefit to this solution. Shareholder value is impacted positively by seeing OPRA as an industry leader in VR and OPRA leadership as actively participating and influencing industry trends. The strategic advantage of this solution is increasing value to current members and increasing membership renewals.

### *Potential Solution 2*

OPRA leadership offers a CESP training track at its semi-annual conferences.

**Research and Literature Support for Solution.** The research identified a need for increased CESP-related training opportunities. The literature review found that in-person events are one of the top five activities that add value to a trade association membership (Higher Logic, 2023). Also, 91.5% of trade association leaders perceive value in conferences, and 70.3% of association leaders perceive value in training and development events (Association Advisor, 2023, p. 21).

**Potential Implications.** Potential advantages to this solution include increasing attendance at OPRA conferences and increasing member value through OPRA fulfilling an identified member need. Potential disadvantages include expanding the focus of OPRA conferences from agency leaders to include agency frontline employees. The financial cost to host a separate CESP track includes renting more meeting room space at conferences. Potential increased costs also include the additional administrative time to request and approve conference proposals for this track, getting conference proposals pre-approved for CESP CEU credit, and managing a greater number of conference attendees. The financial benefit is increased attendance at OPRA conferences and expansion into a previously untapped market for conference attendees. Shareholder value increases through enhanced member engagement in experiences, a

resolution to member needs, and increased opportunities for members to network and collaborate. The strategic advantage is in positioning OPRA as focused on customer solutions.

### ***Potential Solution 3***

OPRA leadership works with member agencies to find ways of using the CESP to advance the industry.

**Research and Literature Support for Solution.** The research identified mixed feelings on the meaningfulness of the CESP. However, as found in the literature review, credentials positively impact customer experience and outcomes in related human service fields (Aliff & Sprong, 2020; Kim, 2020; Sherman et al., 2019). Appropriate education, professional experience, and national certification for VR counselors lead to higher-quality experiences and outcomes for individuals with disabilities (Aliff & Sprong, 2020).

**Potential Implications.** Potential advantages to this solution include increasing appreciation for OPRA leadership's commitment to inform and impact service provider qualifications and professionalism. Potential disadvantages include no impact on members' feelings of value in OPRA. The financial cost to host discussions is minimal as OPRA hosts similar periodic, topic-specific discussions already. The cost would be in staff time to set up and host the discussion and then review information from the discussion. There is no direct financial benefit to this solution. Focus on enhancing the quality of employment specialists and increasing professionalism in the VR industry adds shareholder value. OPRA leadership strategically positions itself as focused on customer solutions in using this potential action.

### ***Potential Solution 4***

OPRA leadership forms a working relationship with APSE to better understand application requirements, training requirements, and renewal requirements to better inform and educate member agencies and improve opinion of the CESP in Ohio.

**Research and Literature Support for Solution.** Earning the CESP and maintaining the credential through continued education were two identified barriers. Notably, the literature review findings indicated that the CESP requirement is similar and equitable compared to other state VR agencies' qualification standards. An additional literature review findings indicated that a commitment to professional growth through collective responsibility and shared values allows collaboration and mutual learning.

**Potential Implications.** Potential advantages to this solution include increasing the value of OPRA through greater appreciation for OPRA leadership's commitment to inform members and a potential working partnership between OPRA and APSE that may provide greater opportunities for collaboration and member offerings in the future. Potential disadvantages include member disappointment if OPRA leadership cannot advocate for all changes members may want APSE to make. The financial cost to invite an APSE representative to an OPRA committee meeting is negligible and within the realm of other guests that OPRA leadership has invited to member meetings. An initial financial benefit may not exist, but should a working relationship build between OPRA and APSE, future opportunities to increase revenue may exist. Shareholder value increases some through a greater understanding of ways to meet requirements. Shareholder value increases much more if OPRA leadership can create a collaborative and complementary relationship with ASPE. The strategic advantage of establishing a collaborative relationship with APSE is increased system lock-in.

## Potential Solution 5

OPRA leadership offers one-day training on topics related to the CESP.

**Research and Literature Support for Solution.** Indicated in the research there was a need for increased CESP-related training opportunities. The literature review found that members value professional development opportunities from their trade associations (McKinley Advisors, 2022). Virtual events, in-person events, and webinars add value to a trade association membership (Higher Logic, 2023).

**Potential Implications.** Potential advantages to this solution include increasing member value through OPRA fulfilling an identified member need that is cost-effective for member agencies. Potential disadvantages include expanding the focus of OPRA-provided training from agency leaders to agency frontline employees. The financial cost to host a one-day in-person training includes renting a space to conduct training, finding presenters, getting the training topics pre-approved for CEU credit, advertising for the event, and coordinating the event. The cost of hosting a one-day virtual training would limit financial obligations from having to rent space. The financial benefit is increased non-dues revenue. Shareholder value increases through a simple, cost-effective resolution to member needs. The strategic advantage is in positioning OPRA as focused on customer solutions.

## Risk Assessment

From the industry analysis in Section 2, organizational analysis in Section 2, and literature review in Section 3, the three most significant risks to OPRA are decreased member engagement, increased tension among members, and an unchanged or decreased perceived value in OPRA membership. One way of assessing risk is the failure mode and effect analysis (FMEA) tool. The FMEA tool helps various industries detect, prioritize, and mitigate risk (Stamatis, 2019). FMEA requires input such as benchmarking, regulatory requirements, and customer needs (Stamatis, 2019). The purpose of using an FMEA in a service organization is to reduce issues and maximize satisfaction (Stamatis, 2019). Characteristics of FMEA include understanding how an element can potentially fail, the severity of the failure, the likelihood of the failure, the detection of the failure, and mitigation steps to minimize the risk of the failure (Stamatis, 2019). For this risk assessment, the scales identifying the severity, likelihood, and detection of risk are listed in Table 9.

Severity		Likelihood		Detection	
4	Critical	4	High	4	Very Difficult
3	Significant	3	Probable	3	Difficult
2	Moderate	2	Occasional	2	Moderate
1	Minimal	1	Remote	1	Easy

**Table 9.** Risk Scoring

A risk priority number (RPN) considers the three characteristics above. Multiplying the three scores above produces an element's RPN. A higher RPN means increased justification for concern (Stamatis, 2019).

Five solutions were proposed:

1. OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding

of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.

2. OPRA leadership offers a CESP training track at its semi-annual conferences.
3. OPRA leadership works with member agencies to find ways of using the CESP to advance the industry.
4. OPRA leadership forms a working relationship with APSE to better understand application requirements, training requirements, and renewal requirements to better inform and educate member agencies and improve opinion of the CESP in Ohio.
5. OPRA leadership offers one-day training on topics related to the CESP.

Using FMEA, potential solutions are ranked from the least amount of risk to the greatest amount of risk that each action represents.

1. OPRA leadership offers one-day training on topics related to the CESP.
2. OPRA leadership forms a working relationship with APSE to better understand application, training, and renewal requirements to better inform and educate member agencies and improve opinion of the CESP in Ohio.
3. OPRA leadership offers a CESP training track at its semi-annual conferences.
4. OPRA leadership works with member agencies to find ways of using the CESP to advance the industry.
5. OPRA leadership can foster discussions surrounding the CESP and the various impacts members feel it has made in their CRP to encourage collaboration, empathy, and deepened understanding of the diversity of shared experiences and create a goal for advocacy that supports all stakeholders.

The five potential solutions offer distinct advantages and disadvantages for OPRA and its members. Financial impact, costs and benefits, and strategic positioning were discussed, and specific risks to each solution were assessed. Solutions that involve OPRA leadership offering training present new avenues for revenue generation, whereas the other three solutions increase OPRA's value through intangible means.

Table 10 displays the risk assessment for the five potential solutions.

Potential Solution	Risk	Mitigation	S	L	D	RPN	TOTAL
1	Decreased engagement	OPRA leadership can encourage multiple avenues for participation in discussion.	1	1	1	1	52
	Member tension	OPRA leadership can set the tone for the meeting to discourage negative feelings.	3	3	3	27	
	Poor value	OPRA leadership can explain how a unified position can positively impact advocacy efforts.	2	3	4	24	
2	Decreased engagement	OPRA leadership can advertise the new track early to produce interest.	3	1	1	3	22
	Member tension	OPRA leadership can clarify the general member needs to be met by the new track.	1	1	3	3	
	Poor value	OPRA leadership can get conference proposals pre-approved for CESP training credit.	4	2	2	16	
3	Decreased engagement	OPRA leadership can encourage multiple avenues for participation in discussion.	2	2	1	4	40
	Member tension	OPRA leadership can provide in-depth information on the impact credentialing has had on other industries.	3	3	3	27	
	Poor value	OPRA leadership can explain the importance of continued efforts to add professionalism to the industry.	1	3	3	9	
4	Decreased engagement	OPRA leadership can explain the type of insight that APSE representatives can offer.	2	1	1	2	14
	Member tension	OPRA can set the tone of conversations.	2	1	3	6	
	Poor value	OPRA leadership can illustrate the benefits of collaboration with like-minded organizations.	1	2	3	6	
5	Decreased engagement	OPRA leadership can advertise the one-day training and the advantages of attending and presenting.	3	1	1	3	12
	Member tension	OPRA leadership can expound on the benefits of shared knowledge.	1	1	3	3	
	Poor value	OPRA leadership can get training topics pre-approved for CESP training credit.	3	1	2	6	

**Table 10.** Risk Assessment for Potential Solutions

### Test Solution Identification and Basis for Selection

Upon consideration of the literature review, research analysis, multiple perspectives frameworks, exploration of implications, and risk assessment, the optimal test solution is for OPRA leadership to offer one-day training to member agencies’ employment specialists, add a CESP track to its semi-annual conferences, and form a working relationship with APSE. This solution increases opportunities for member engagement, increases opportunities for professional development, and strategically positions OPRA to access CESP-related information from APSE and be a source of information on employment specialists to APSE. This test solution considers the assessed risk value of individual potential solutions, customer-centric strategic positioning, and alignment with OPRA’s core values. This solution provides an opportunity for OPRA to generate non-dues revenue, engage more OPRA members, and directly address the identified

CRP need for more professional development opportunities. Additionally, this solution encourages building a strong, synergistic relationship with APSE, improving OPRA leadership's ability to educate members on the CESP credentialing process.

After carefully analyzing the environment, industry, and organization, the identified problem facing OPRA leadership was the need to remain significant to members regarding the CESP requirement by providing relevant information and being a resource on employment specialist qualifications. From there, the driving research question proposed to discover actions for OPRA leadership to take that would secure OPRA's position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio VR industry in a manner that positively impacts individuals with disabilities and employer workforce needs. OPRA leadership recognized that more information was needed to address this problem. The literature review found that using the CESP as a qualification for supported employment aligned with many other state VR agencies' qualifications. The literature review also found that credentialing can be a valuable asset to an industry in stabilizing a workforce, increasing employment opportunities for credential-holders, and improving customer outcomes. The exploratory research discovered that CRPs had mixed experiences with the CESP and overwhelmingly struggled to get staff certified and find continuing education. Considering the literature review findings, research analysis, and multiple solutions frameworks, OPRA leadership can most effect change in employment specialist qualifications in the Ohio VR industry by improving accessibility to information on credential requirements and required ongoing training.

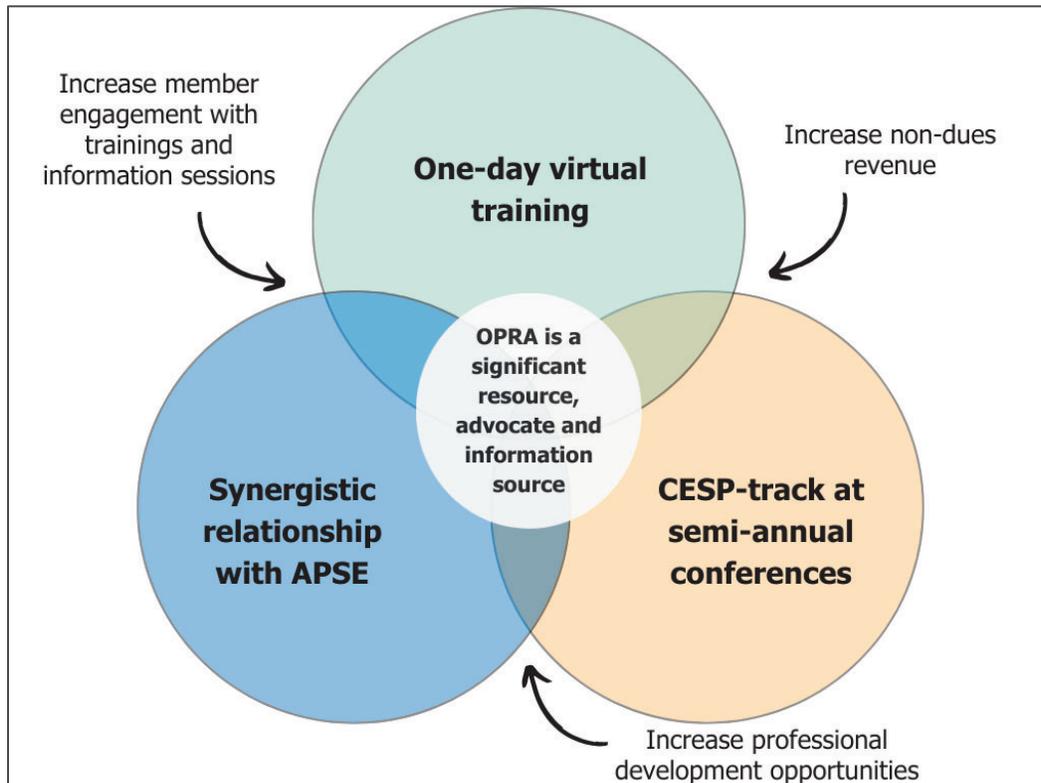
Offering one-day training and a CESP training track at conferences encourages employment specialists to maintain their CESP. A working relationship with APSE further encourages and potentially streamlines access to information on the credential requirements. This solution safeguards OPRA's position as a significant resource and source of information for employment specialist qualifications in Ohio's VR industry. Further, the research analysis found a pattern suggesting that more individuals with disabilities are helped and more workforce needs are met by employment specialists with the CESP. While this pattern is not confirmed, it does provide further justification for choosing a test solution that supports ongoing efforts for employment specialists to obtain and maintain their CESP.

## Recommendations

OPRA leadership identified the lack of formal or organized training for member agencies as an organizational weakness and developing formal training for members as an identified opportunity (S. Marks, personal communication, March 29, 2023). Financial security was identified as an organizational threat (S. Marks, personal communication, March 29, 2023). The literature review identified membership value as a critical strategic priority for trade associations (McKinley Advisors, 2022). Professional development is a significant value component for a trade association member (McKinley Advisors, 2022). Trade association value is often measured by member engagement (Association Advisor, 2023). Also, increasing non-dues income has emerged as an essential trade association directive (McKinley Advisors, 2022). Benchmarking measures of member engagement include attendance at trade association events.

The literature findings, research analysis, and assessment of potential solutions identified the optimal solution to be a combination of potential solutions, including OPRA leadership creating a synergistic relationship with APSE, OPRA leadership offering one-day trainings, and OPRA leadership adding a new CESP training track to semi-annual conferences. If OPRA offers two six-hour one-day virtual trainings a year, employment specialists can fulfill all 36 hours of ongoing training required by the CESP. Additionally,

employment specialists without a CESP can attend and still have access to professional development opportunities. Offering a CESP training track at semi-annual conferences will allow employment specialists to network and collaborate with peers and earn CEUs for the CESP. In offering these trainings, OPRA leadership increases opportunities for member engagements and professional development experiences. OPRA leadership also opens an alternate avenue for non-dues revenue. Finally, working with APSE gives OPRA leadership valuable insights into the types of training that qualify for CEUs and clarification on other barriers CRPs face in maintaining a credentialed workforce. See Figure 22 illustrates these recommendations.



**Figure 22.** *Effecting Change in Employment Specialist Qualifications*

### Rigor of the Research

The exploratory study used a mixed-methods research design and a thematic approach to the analysis. Qualitative and quantitative analysis can be completed rigorously as long as it is “thorough, systematic, consistent, methodical and cautious” (Daniel et al., 2024, p. 2). Other characteristics of rigorous research are transparency and reproducibility (Kubas et al., 2018). The research design’s dependability, credibility, transferability, and confirmability illustrate the research’s rigor. Dependability is achieved through a systematic approach and consistency in data interpretation (Daniel et al., 2024). Credibility refers to authentic research findings attained through soundly aligning design, data collection, and analysis (Daniel et al., 2024). Transferability allows findings to be applied to related situations (Daniel et al., 2024). Finally, confirmability includes inspection of the research methodology’s integrity and the ability for outsiders to evaluate findings.

## **Dependability, Credibility, Transferability, Confirmability**

The researcher achieved dependability by systematically choosing an exploratory study, mixed methods design, thematic analysis, and reporting of results. The researcher addresses credibility by aligning the exploratory research design, mixed methods data collection, thematic analysis, and multiple framework interpretation with reason and coherence. The researcher described in detail the context of the setting, sample, and population to aid transferability. The researcher provided details on choosing the research design and methodology, data collection, and analysis for outside reviewers and corroborated qualitative data through member checking during semi-structured interviews.

## **Limitations and Generalizability**

Quantitative data is limited in generalizability as it does not account for context (Mulisa, 2022). Limitations that impact the generalizability of this quantitative study include the small sample size of the dataset and the use of thematic analysis versus confirmatory analysis methods. This research was designed to be exploratory in nature. While patterns may exist, further confirmatory research is needed before widely applicable conclusions are made.

Qualitative interviews are appropriate to gain a deeper insight and multiple perspectives of a phenomenon; however, the results are not meant to be generalized to a population due to the small sample size (Mulisa, 2022). The perceptions offered in these interviews provided themes for further research into the CESP regarding potential advantages and disadvantages to agencies for the OOD CESP requirement, and underlying reasons of distaste for the CESP.

## **Summary**

This section considered the literature review from Section 3 to create an exploratory research design. A mixed methods research methodology combined a quantitative dataset with qualitative interviews. The thematic analysis approach provided consistency across datasets and respected the exploratory nature of the overall research design. Multiple frameworks were used to interpret and assess the information and identify potential solutions. Potential solutions were then evaluated based on viability and a risk assessment. The optimal solution was identified that OPRA leadership should offer one-day CESP-related trainings to member agencies. This solution aligns with industry benchmarking and best practices for trade associations and also addresses the driving research questions for a solution that strategically positions OPRA to impact employment specialist qualifications, individuals with disabilities, and employer workforce needs.

## SECTION 5: CHANGE MODEL



*Note. From Photo of People Working in the Office [Photograph], by Kampus Production, n.d., Pexels.*

The previous section considered the multiple perspective frameworks of the NOISE Analysis, the Delta Model, and the combined McKinsey-7S/VBM Analysis. The exploratory research included a secondary dataset, semi-structured interviews, and thematic analysis to identify research findings. The multiple perspective frameworks, the research analysis, findings in the literature review, and a risk assessment revealed a multi-step optimum test solution. This optimal test solution satisfies the driving research question, *How can OPRA secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio VR industry to positively impact individuals with disabilities and employer workforce needs?*

This section demonstrates the business case for change and the importance of managing change. A custom change management model is developed and utilized in creating a change management plan for OPRA leadership to execute. Scope, intended outcomes, stakeholder analysis, duration, cost, barriers, and performance measures are addressed. Finally, scenario planning is conducted to consider the implications of change.

## **Making the Case for Change: Reframing the Organization**

The researcher met with OPRA Vice President Scott Marks on August 15, 2024, using Microsoft Teams. Sections 1 and 2 of this paper were summarized. Key findings from the Section 3 literature review were covered in-depth, as these findings provide a foundation for understanding the various components of this topic. The gap in the literature review was summarized. The themes and research findings were discussed, along with various opinions gathered from the semi-structured interviews. The test solution was proposed, including a timeline for implementation and a cost-benefit analysis.

A dynamic conversation with Scott Marks ensued, answering questions, clarifying information as needed, and discussing the proposed solution at length. The presented test solution of offering one-day trainings, adding a CESP track at semi-annual conferences, and creating a synergistic relationship with APSE was authorized without modification. OPRA leadership agrees that this solution adds value to the OPRA membership by creating more accessible means for employment specialists to obtain and maintain the CESP qualification while positively impacting the experiences of individuals with disabilities and meeting employer workforce needs.

## **Using a Multiframe Perspective: Planned Change Intervention Model**

Change is a persistent element in organizations, impacting everything from daily operations to overarching strategic goals (Pepple et al., 2024). Managing change connects solutions to the desired results (Mirzoyan & Tovmasyan, 2022). Change management strategies are key contributors to organizational success, driving productivity, sustaining competitive advantages, increasing employee effectiveness, and strengthening financial performance (Pepple et al., 2024). A change management plan outlines strategies to manage risks, establishes a supportive infrastructure, and coordinates with a technical plan (Mirzoyan & Tovmasyan, 2022). Since organizational change depends on individual change, implementing change without a management plan can lead to project delays and budget overruns caused by people-related challenges (Mirzoyan & Tovmasyan, 2022). Thus, the purpose of a change management plan is principally about the cooperative role of people in moving through change to a positive result and less about the specifications of the change (Mirzoyan & Tovmasyan, 2022). Choosing an appropriate change model is critical to ensuring cooperation and successful outcomes.

To choose an appropriate change model, one must first understand the type of change that is desired. Pepple et al. (2024) identified four types of change management strategies: transformational, remedial, incremental, and unplanned. These researchers recognize transformational change as a foundational change to the entire organization, its framework, or its core values. The study describes the remedial change as turning floundering programs or departments into productive business elements. The authors portray incremental change as a slight deviation from existing core activities that is an adaptation or response to environmental changes. Finally, unplanned changes are “unexpected, unprecedented, unscheduled changes” (Pepple et al., 2024, p. 412) due to unexpected environmental conditions. In Section 4, alignment with OPRA’s existing core values was considered when selecting a test solution. As such, the test solution represents an incremental change for the OPRA organization by expanding current training offerings, conference tracks, and industry relations.

Incremental change appears unobtrusive on the surface but can lead to larger, robust system-wide improvements (Pepple et al., 2024). Three requirements for incremental change are “vision, increased tolerance to change, and innovation” (Pepple et al., 2024, p. 411). Supporting personal connections across

stakeholders encourages successful incremental change and fosters loyalty (Pepple et al., 2024). With these characteristics of incremental change in mind, a customized change model imbuing elements of ADKAR, Senge’s Fifth Discipline, and the Virtuous Business Model is proposed.

## ADKAR Change Model

DePodesta (2024) states that the ADKAR framework supports change through five critical steps: awareness, desire, knowledge, ability, and reinforcement. He defines the awareness stage as identifying why a change is necessary. The desire stage focuses on each stakeholder’s acknowledgment and acceptance of the identified change. DePodesta describes the knowledge phase as identifying what behaviors need to change, what processes must be created and implemented, and what new responsibilities are required after the change occurs. The author goes on to explain the ability period as the implementation of the change. Lastly, the reinforcement stage ensures the change is sustainable, continues to build, and positions the organization for credible future changes.

Advantages of using ADKAR include its simplistic structure, focus on people, adaptability in complex environments, and ability to generate solutions for identified opportunities (DePodesta, 2024). As a trade association, OPRA leadership operates in a complex environment, ardently focusing on relationships and mitigating identified problems for members. The ADKAR change model’s advantages are well-suited for the solution OPRA leadership has chosen to implement. Figure 23 depicts the adapted ADKAR model used in this study.

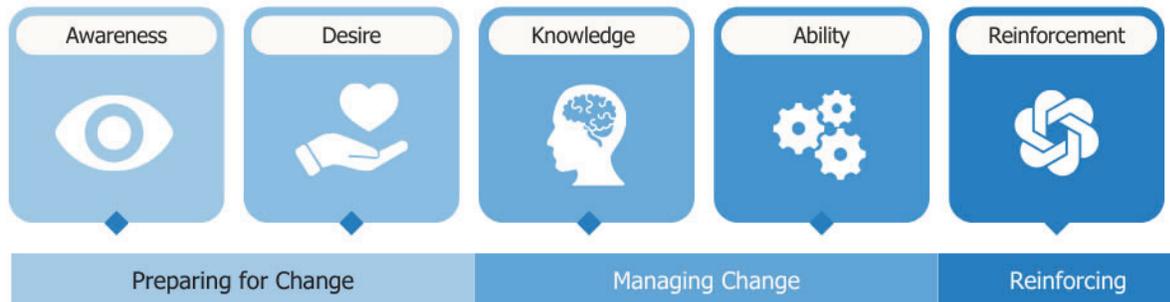


Figure 23. ADKAR Change Model<sup>18</sup>

## Senge’s Learning Organization Framework

Senge’s Learning Organization framework is founded on five disciplines: personal mastery, mental models, shared vision, team learning, and systems thinking (Hansen et al., 2020). Personal mastery is the dual discipline of ensuring cognizant and deliberate personal vision and commitment to lifelong learning (Hansen et al., 2020). Mental models are part of the discipline of recognizing one’s paradigm, adjusting to new information, and directing actions (Hansen et al., 2020). Creating a shared vision involves working towards a common goal that is larger than oneself, developing a team spirit, and bringing an overarching sense of purpose (Hansen et al., 2020). Team learning emphasizes the importance of collaboration and collective problem-solving, aligning the team to achieve results greater than the sum of individual efforts

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<sup>18</sup> Adapted from “The Development of Leadership Communities of Practice” by M. DePodesta, 2024 (July/September), *Nursing Administration Quarterly*, 48(3). <https://doi.org/10.1097/NAQ.0000000000000648>

(Hansen et al., 2020). The fifth discipline, systems thinking, integrates the other four aspects for a holistic approach of understanding interrelationships, patterns, and feedback and how these can be managed to drive innovative change (Hansen et al., 2020).

Senge's framework, illustrated in Figure 24, combines the first four disciplines into the critical fifth discipline—systems thinking (Hansen et al., 2020). "Systems thinking allows organizations to make sense of the disparate parts and link up different stakeholders to overcome complex issues" (Hoe, 2020, p. 58). Addressing complex realities with linear approaches can lead to inadequate solutions that fail to match the problem's complexity (Rebelo et al., 2020). Systems thinking, which views the situation holistically and identifies interconnected elements, is essential for organizations to effectively understand and address challenges (Rebelo et al., 2020). Unlike some organizations, trade associations operate as part of industry-wide systems. Thus, trade association change management must be grounded in systems thinking, not a simple linear model. Senge's Learning Organization framework is critical for successfully implementing OPRA leadership's chosen solution.

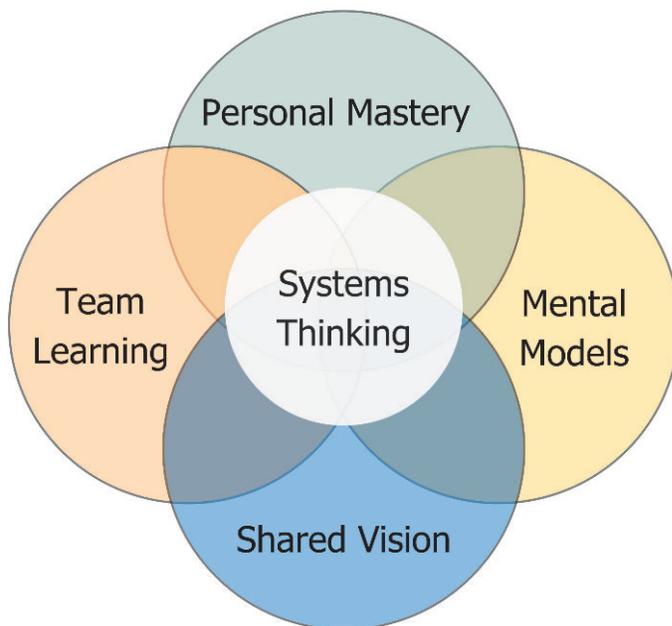


Figure 24. Senge's Learning Organization<sup>19</sup>

## VBM Framework

The VBM is a complex model that considers the individual and the organization and the three aspects of being, knowing, and doing (Brooker & Boyce, 2017). The individual leader frame is broken down into the three components of personal, spiritual, and professional, and is centered around Christ, who is the ultimate symbol of virtue (Brooker & Boyce, 2017). The organizational frame is divided into the components of social capital, spiritual capital, and economic capital; it is also centered around Christ (Brooker & Boyce, 2017). Both are shown in Figure 25. A key concept of the VBM is that the organization

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<sup>19</sup> Adapted from *The Responsible Learning Organization: Can Senge (1990), in "Teach Organizations How to Become Responsible Innovators?"* by J. O. Hansen, A. Jenson, & N. Nguyen, 2020, *The Learning Organization*, 27(1), <https://doi.org/10.1108/TLO-11-2019-0164>

is the synergistic compilation of its individuals (Brooker & Boyce, 2017). This concept aligns with systems thinking.

The VBM outlines an avenue for an individual to be virtuous in essence, thought, and action, utilizing the characteristics of critical thinking, integrity, and reconciliation (Brooker & Boyce, 2017). As stated earlier, change management is largely focused on helping individuals through change. The individual characteristics of the VBM assist in this process by fostering traits that open a person to the idea of change. The VBM drives organizational change using the attributes of creativity, proficiency, and support (Brooker & Boyce, 2017). The organizational properties of the VBM create both boundaries and instigators for organizational change by utilizing social, economic, and spiritual capital that promotes transparency, innovation, and operational efficiency. Incorporating the VBM into OPRA’s change management model ensures virtuous, synergistic change for OPRA’s team, the OPRA organization, and OPRA’s stakeholders.

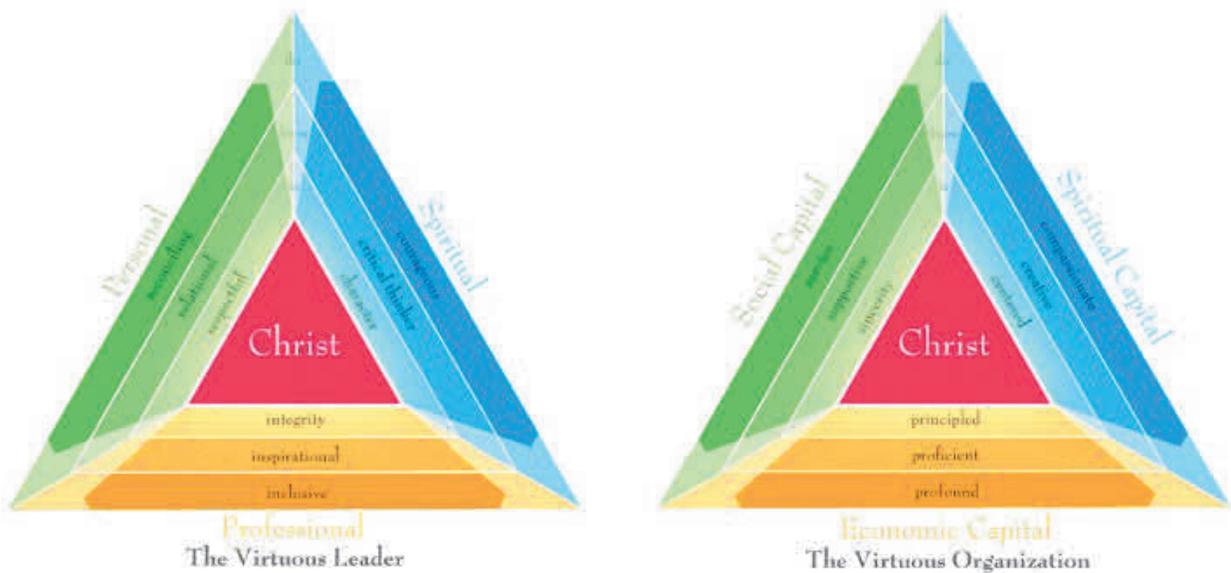


Figure 25. *Virtuous Business Model*<sup>20</sup>

## Customized Change Management Model

This customized change management model assumes that OPRA team members and OPRA stakeholders have an individual foundation in virtue, allowing them to have the courage to change, critical thinking to accept new information, respectful interpersonal relations, and integrity. It is developed based on the assumption that the OPRA organization and CRPs strive to be virtuous organizations. This assumption is critical to the success of the various aspects of the customized change management model.

### *Awareness/Mental Model Phase*

To build awareness of the need for change, existing mental models within the organization and stakeholders need to be addressed. Using Senge’s concept of mental models, leaders can identify and challenge the ingrained beliefs and assumptions that may hinder awareness (Hansen et al., 2020). By doing

<sup>20</sup> From *Virtuous Leaders & Organizations* by M. Brooker and J. Boyce, 2017 (Spring), <https://tinyurl.com/yfa4uzy6>

so, they can help stakeholders understand why the change is necessary and how it aligns with the broader goals of the organization and industry. Examining mental models, as Senge proposes, requires the individual to be open to critical thinking, inclusiveness, and respect for new ideas (Hansen et al., 2020).

### ***Desire/Shared Vision Phase***

Creating a shared vision can foster the desire for change. When stakeholders are involved in shaping the vision and understand how the change contributes to a shared goal, they are more likely to support and participate in the change process. Shared vision encourages organizations to be supportive of each other, compassionate, and principled.

### ***Knowledge/Personal Mastery***

Personal mastery aligns with the ADKAR step of building knowledge. As employees and stakeholders develop the necessary skills and knowledge to implement the change, they also engage in continuous learning, central to personal mastery. This phase needs individual inspiration, relationships, and courage to foster a learning environment.

### ***Ability/Team Learning***

Team learning can enhance the ability to implement change by fostering collaboration and shared problem-solving. As teams learn together, they can support one another in applying new skills and behaviors, making the change more effective and sustainable. This phase involves organizational sincerity, creativity, and profoundness to achieve synergistic outcomes.

### ***Reinforcement/Systems Thinking***

Systems thinking is crucial for reinforcing change because it allows leaders and stakeholders to see how different parts of the industry are affected by the change and ensure that all components work together to sustain it. By understanding the system, leaders can identify feedback loops, potential challenges, and opportunities for continuous improvement.

Integrating Senge's Learning Organization with the ADKAR model creates a change management plan that is both structured and adaptive. ADKAR provides a clear roadmap for managing change at the individual level, while Senge's disciplines add depth by addressing the underlying culture, learning, and systemic factors that influence change. This combined approach ensures that change is implemented and deeply understood, supported, and sustained throughout the industry. Refer to Figure 26.

## Customized Change Model

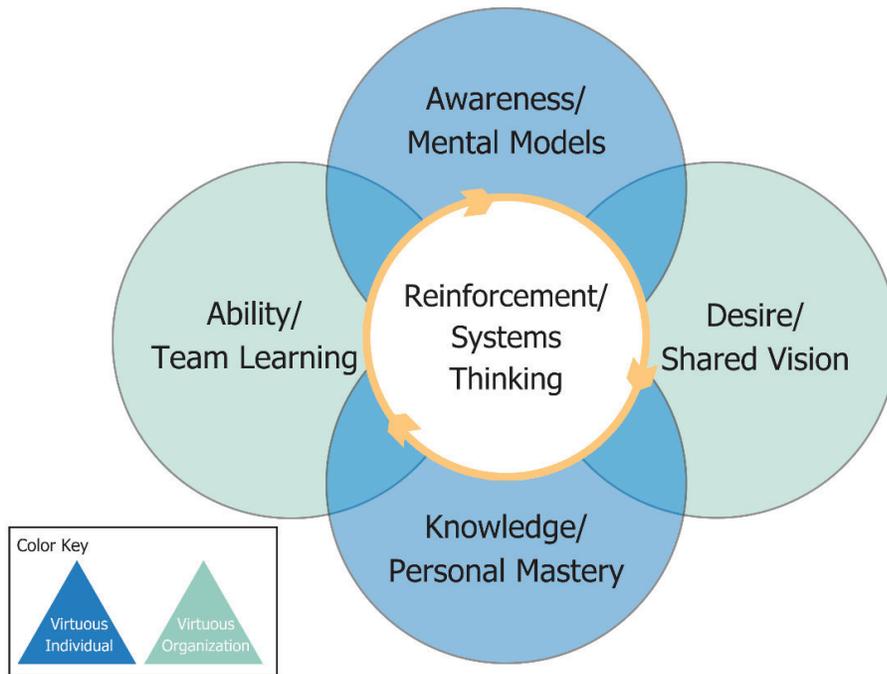


Figure 26. Customized Change Model

### Change Management Plan

To simultaneously effect change on employment specialist qualifications while adding value to OPRA membership, OPRA leadership agrees that offering one-day virtual training, adding a CESP-track to semi-annual conferences, and building a synergistic relationship with APSE are necessary and sufficient actions to address identified stakeholder and industry needs. Currently, CRPs have disparate views of the CESP, lack a broad understanding of the current impacts of the CESP, and struggle to maintain a workforce of credentialed employment specialists. The proposed change encourages a unification of belief surrounding the value of the CESP qualification and supports CRPs in implementing this credential.

#### Awareness/Mental Model Phase

Existing mental models among stakeholders need to be addressed. OPRA leadership can identify and challenge the ingrained beliefs and assumptions that may hinder awareness. By doing so, they can help stakeholders understand why the change is necessary and how it aligns with the industry's broader goals.

## **Desire/Shared Vision Phase**

Creating a shared vision can foster the desire for change. Using OPRA committee meetings, stakeholders can help shape their vision and understand how the change contributes to a shared goal. This way, they are more likely to support and participate in the change process.

## **Knowledge/Personal Mastery**

As OPRA employees encourage stakeholders to accept the need and vision for change, employment specialists must develop the necessary skills and knowledge to implement the change of engaging in continuous learning. Engaging APSE to clarify training topics and process CEUs is particularly beneficial in this stage.

## **Ability/Team Learning**

As CRPs participate in shared learning experiences, they can support one another in applying new skills and behaviors, making the change more effective and sustainable.

## **Reinforcement/Systems Thinking**

Systems thinking is critical to reinforcing change as it considers how the proposed change affects all the various stakeholders within Ohio's VR industry. Feedback can be gathered at each phase to address challenges and take advantage of emerging opportunities.

## **Type and Scope of Change**

While the proposed change is necessary and sufficient for OPRA leadership to increase its value by effecting change in employment specialist qualifications, it represents an incremental change for the organization and a transformational change for the VR industry. As mentioned earlier, incremental change is a variation to existing activities in response to external changes (Pepple et al., 2024). The proposed change is an expansion of activities that OPRA is already doing. However, while the change is incremental for the OPRA organization, the proposed change is transformational for the Ohio VR industry. Transformational change is an alteration of core beliefs, frameworks, and foundations (Pepple et al., 2024). Until now, the understanding of employment specialist qualifications has been diverse among CRPs based on incomplete information. OPRA leadership seeks to create a shared belief that the CESP is valuable to the Ohio VR industry and establish collaborative support for the CESP qualification.

The proposed change has a limited scope and can be implemented using existing OPRA staff, technology, and processes.

## **Intended Outcomes and Benefits**

While Ohio's VR industry currently needs more credentialed employment specialists, the proposed change eases the barriers for employment specialists to obtain and maintain the CESP through OPRA-provided training and a relationship with APSE.

The vision for this change is “When Everyone Wins.” The strategy is to use the multi-step proposed change to encourage system-wide buy-in to the CESP as a credible qualification for employment specialists that benefits all stakeholders in the industry. Through collaborative virtual and in-person training, OPRA leadership will support this acceptance by removing identified barriers to obtaining and maintaining the CESP credential. OPRA leadership will further support the credential by building a synergistic relationship with APSE, giving Ohio CESP-holders an opportunity to get clarification on various aspects of the CESP and providing APSE leaders with a direct line to feedback regarding their credential.

With this proposed change, CRPs will have a more stable workforce, credentialed employment specialists will have greater employment access, employers will have increased opportunities to meet their labor demands, individuals with disabilities can work with more professionally qualified employment specialists, OOD will have a pool of qualified providers, and OPRA leadership can increase its value to members. Figure 27 maps the outcomes and benefits. Together, the Ohio VR system has an opportunity to work more efficiently and effectively at every level.



**Figure 27.** Change Vision: When Everyone Wins

### Assessment of the Impact of the Proposal

This proposed change directly ties to OPRA’s mission, anchor statement, and core values. Providing an avenue for employment specialists to obtain and maintain the CESP credential demonstrates OPRA’s mission to support providers to ensure the availability of high-quality services to support individuals with intellectual and developmental disabilities. Ongoing collaborative training aligns with OPRA’s anchor

statement focusing on supporting the success of people served. Finally, the proposed change directly supports OPRA's core values of community, advocacy, information, and resources.

As the scope of the change is limited, the proposed change does not modify OPRA's current strategy, structure, systems, staff, skills, style, or shared values discussed in Section 2. Instead, the critical element of the change plan is creating buy-in and encouraging collaboration with outside stakeholders.

## **Change Through the Lens of the VBM**

The VBM is an integral aspect of the proposed change. The basis for this change is the profound new knowledge gained from the literature review and research findings. An innovative, inclusive, supportive, and creative change solution is proposed from the new knowledge. While little economic capital is required for this change, social capital and spiritual capital are critical components of the change. OPRA leadership must demonstrate support, sincerity, and compassion to foster acceptance of the CESP credential. Leaders within OPRA and OPRA's committees must demonstrate courage, inspiration, and respect to promote the change systemwide.

## **Stakeholder Analysis**

While many stakeholders are affected by the proposed change, not all stakeholders have a role in the planned change.

### ***OPRA Employees***

The proposed change does not require a change in behavior; however, it adds some additional work to several OPRA employees coordinating one-day training and a CESP track at conferences. Communicating the additional non-dues revenue, increased member engagement, and increased intangible value as a recognized problem-solver with the Ohio VR industry should nurture acceptance of this change within OPRA employees. Change adoption can be measured by adhering to internal timelines created to implement the change.

### ***Member Agencies***

The proposed change requires member agencies to accept the benefits of the CESP identified in the literature review and research findings. Member agencies will need to embrace the CESP as a credible qualification for employment specialists and commit to supporting their employees in earning the credential. Communicating the new knowledge gained from the literature review and research findings will help create awareness and a desire for change. Using OPRA's employment committee to develop one-day training and a CESP conference track will bolster a shared vision for change and knowledge/personal mastery. Implementing the training opportunities will produce team learning. Change adoption can be measured in participation rates in employment committee planning meetings and the proposed training opportunities.

## ***Employment Specialists***

The proposed change requires employment specialists to desire to obtain the CESP credential and to recognize the CESP credential as a route for professional growth. Awareness of the CESP's potential impact on an employment specialist's career must be communicated to foster a shared vision of ongoing, collaborative learning. Employment specialists must be encouraged to create training content for their peers and participate in training opportunities. Change adoption can be measured by the percentage of training presentations given by frontline employment specialists versus supervisors or managers.

## ***APSE***

The proposed change requires APSE representatives to participate in building a relationship with OPRA leadership. As a state, Ohio has more employment specialists with a CESP than any other state (T. Nelles, personal communication, July 17, 2023), making a relationship with OPRA leadership attractive as APSE representatives can have direct access to a large pool of feedback. Awareness and a shared vision can provide a foundation for a synergistic relationship between the two organizations. Reciprocal communication of knowledge provides a foundation for team learning and systems thinking that broadens the system past Ohio's VR industry and begins incorporating the VR industry nationally. Change adoption can be measured in the frequency of meetings between OPRA and APSE personnel.

## **Potential Impact of the Change on the Organizational Culture**

Whereas OPRA employees, employment specialists, and APSE personnel may have very few misgivings regarding the proposed change, member agencies may have more of a mixed response given the dichotomy of opinion presented in the semi-structured interviews. OPRA Vice President Scott Marks indicated that OPRA is absolutely ready to begin implementing the proposed change. The information discovered in the literature review and research findings must be communicated to member agencies to prepare them for the proposed change.

## **Estimated Duration**

The proposed change will take approximately eight months to fully implement. Figure 28 illustrates the implementation timeline.

# Implementation Timeline

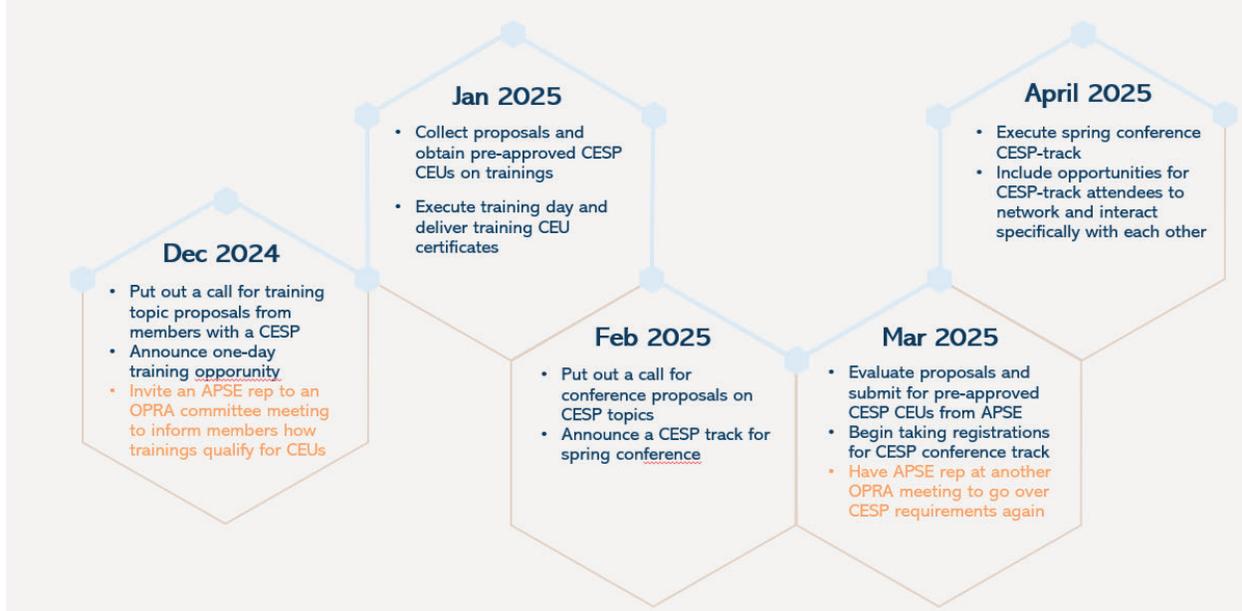


Figure 28. Change Management Implementation Timeline

## Estimated Costs

Due to the limited scope of the proposed incremental change, no additional costs are expected. From the timeline above, additional cash inflows are expected from the January 2025 training day and April 2025 conference.

## Organizational Barriers to Change: Reinforcement Strategies

Upfront risks to the proposed change include hesitation or outright resistance from member agencies to accept the CESP as a credible qualification. Once this barrier is overcome, implementation risks include poor attendance of training opportunities. Finally, after implementing the proposed change, the risk of discontinuing training opportunities exists if reinforcement is not adequately implemented. Initial resistance from members can be mitigated through the thorough sharing of information learned from the literature review and research findings. Implementation risks can be mitigated by involving OPRA's employment committee in planning the training opportunities. With proper reinforcement of the systemwide impact, the risk of discontinued training opportunities can be mitigated. Reinforcement strategies include recognition of training presenters on OPRA's social media outlets, celebrating CESP-track attendees, and gaining feedback from member agencies on the impact of the CESP on their agency.

## Measuring Change Performance

The proposed change outlines three distinct actions: one-day virtual training, a CESP track at the OPRA semi-annual conference, and a relationship with APSE. Key performance indicators (KPIs) measure the success of actions.

Specific KPIs of Proposed Change:

1. Count of registrations for virtual one-day training
2. Count of attendees at virtual one-day training
3. Qualitative feedback surveys for virtual one-day training
4. Count of registrations for the CESP track at the in-person conference
5. Count of attendees at the CESP track at the in-person conference
6. Qualitative feedback surveys for CESP track at the in-person conference
7. Number of times APSE representative is willing to meet with OPRA leadership
8. Percent change in attendance at committee meetings where an APSE representative is a guest speaker
9. Qualitative feedback surveys of committee meetings where an APSE representative is a guest speaker

KPIs of Organizational Change:

1. Percent change in non-dues revenue as a percent of OPRA's overall annual income
2. Change in participation in conferences
3. Change in member engagement rate
4. Increase in the number of members
5. Increase in member retention

## Scenario Planning

Without unified systems thinking, organizations struggle to predict unexpected system behaviors, especially in complex and uncertain environments (Dal Borgo & Sasia, 2022). Analyzing interconnected factors and seeing beyond partial truths is crucial to navigating high-risk markets (Dal Borgo & Sasia, 2022). This analysis and foresight is accomplished through scenario planning. The scenario planning process involves selecting uncertain but influential forces affecting a focal issue and developing scenarios based on their combinations (Dunn & Fallah, 2024). Each scenario is then analyzed to determine potential opportunities, threats, and the strategic actions required (Dunn & Fallah, 2024). Scenario planning is designed to challenge assumptions about the future (Dunn & Fallah, 2024). One approach to scenario planning is to look at six different scenario types and their corresponding questions, as proposed by Börjeson (2005):

- Forecast: "What will happen, on the condition that the likely development unfolds?" (p. 15)
- What-if: "What will happen, on the condition of some specified events?" (p. 15)
- External: "What can happen to the development of external factors?" (p. 18)
- Strategic: "What can happen if we act in a certain way?" (p. 18)
- Preserving: "How can the target be reached by adjustments to current situation?" (p. 20)
- Transforming: "How can the target be reached when the prevailing structure blocks necessary changes?" (p. 20)

Due to the interdependent nature of OPRA within the VR industry, three external scenarios are explored below.

### ***Scenario 1: What Happens if OOD No Longer Requires the CESP Credential?***

Decoupling the CESP from OOD is critical to assessing the merits of the CESP and fully appreciating its impact outside of OOD's requirement. OPRA leadership can prepare for this scenario by presenting the CESP as an asset to the industry on its own. Supporting the CESP credential should be seen as necessary regardless of OOD policies.

### ***Scenario 2: What Happens if OPRA Membership Declines?***

Increasing avenues of non-dues revenue is critical for OPRA's financial stability. Offering training to members and non-members provides revenue channels independent of membership numbers.

### ***Scenario 3: What Happens if Member Agencies Choose Not to Participate?***

If OPRA leadership implements the proposed change and member agencies choose not to participate in the new training opportunities, OPRA will have very little financial impact due to the limited scope of the incremental change. OPRA leadership can pivot, reach out to members, and find a more satisfactory method of meeting member needs.

## **Action Plan**

The action plan in Table 11 is designed to be fluid and responsive to member input. The critical phases are taken from the customized change management model. Although the phases are listed in linear order, the change model is meant to be dynamic, with phases revisited as needed.

Phase	Awareness/ Mental Model	Desire/ Shared Vision	Knowledge/ Personal Mastery	Ability/ Team Learning	Reinforcement/ Systems Thinking
<b>Action</b>	Create awareness of the merits of the CESP within member agencies	Create a shared vision for supporting the CESP credential	1. Engage APSE 2. Request proposals for one-day training presenters 3. Request conference proposals	1. Hold one-day training 2. Execute a CESP track at the Spring OPRA conference	1. Celebrate training completions and conference attendees with certificates 3. Spotlight presenters on social media
<b>Responsible Party</b>	OPRA leadership, researcher	OPRA leadership	OPRA leadership	OPRA leadership, Employment specialist presenters	OPRA leadership
<b>Method</b>	Present at an OPRA employment committee meeting	Discuss at OPRA employment committee meeting	1. Reach out to APSE 2. & 3. Reach out to member agencies	1. & 2. Foster dynamic learning and exchange of knowledge	1. Emailed certificates 2. Social media posts
<b>Time Period</b>	Oct 2024	Oct 2024	1. Dec 2024 2. Dec 2024 3. Feb 2025	1. Jan 2025 2. Apr 2025	1. & 2. Ongoing
<b>Where</b>	Virtual Zoom meeting	Virtual Zoom meeting	1. Phone/email 2. & 3. Email	1. Virtual Zoom meeting 2. TBD (wherever the spring conference is held)	1. Email 2. Social media
<b>Purpose</b>	Address the lack of information and disparate experiences of member agencies with the CESP	Engage member agencies to contribute to forming support for the CESP	1. Begin forming a synergistic relationship 2. & 3. Encourage current CESP employment specialists to provide the training	1. & 2. Support employment specialists in earning CEUs and furthering professional development	1. & 2. Reinforce change and encourage continued systems thinking

**Table 11.** *Change Management Action Plan*

## Conclusion

Introduced in Section 1 is the problem of an industry in crisis with an employment specialist qualification that has become a barrier to individuals with disabilities, employers facing worker shortages, a state VR agency unable to fulfill its purpose, and CRPs facing shortages in credentialed employees. OPRA leadership

identified this crisis as an opportunity to create value in its membership if more information regarding the crisis could be obtained.

A foundational understanding of the interrelated aspects of the problem is discussed in Section 2, with an overview of the VR environment in Ohio, the trade association industry, the VR industry, and the OPRA organization. To create a foundational understanding of the interrelated aspects of the problem, known facts, assumptions, knowledge gaps, hunches, and ideation of solutions associated with the problem are explored. The findings were foundational for developing the problem statement as well as the driving research question: *How can OPRA secure its position as a significant resource, advocate, and source of information to its stakeholders by effecting change in employment specialist qualifications in the Ohio VR industry to positively impact individuals with disabilities and employer workforce needs?* Guiding questions were created for further exploration, with the scope of the study outlining the research boundaries.

Section 3 provides an in-depth literature review based on the guiding questions. Topics explored include employment specialist qualifications across the United States, the impact of credentials on the industry, measures of quality services, and benchmarking within the trade association industry. Best practices in professional development and stakeholder influences offer ideation for solutions. The exploratory research methodology findings and the gaps in the literature helped to inform the research design.

Multiple perspectives and frameworks and the planned inquiry are introduced and explained in Section 4. Research findings were analyzed using the NOISE analysis, Delta Model, and combined McKinsey 7-s/VBM Model to create potential solutions. Potential solutions were then assessed for viability and risk until one proposed test solution was determined. The resulting test solution is threefold: a multifaceted change approach to introduce one-day virtual training, the addition of a CESP track to semi-annual conferences, and the development of a synergistic relationship with APSE. Recommendations, the rigor of the research, limitations, and generalizability address the quality and applicability of the study's findings.

In Section 5, the case for change is presented. The test solution was presented to OPRA Vice President Scott Marks, who accepted the test solution without modification. A customized change management model was created incorporating elements of ADKAR, Senge's Learning Organization, and the VBM. The customized model was used to create a change management plan for OPRA. The plan was thoroughly assessed for scope, intended outcomes, assessed impact, stakeholder analysis, estimated duration and cost, barriers, and performance measurement.

In requesting more information regarding the CESP issues, OPRA leadership have gained valuable insights into a complex problem. The information uncovered in the literature review identified the viability of the CESP as a credible qualification, the overwhelmingly positive impact of adding a credential to an industry, the tangible and intangible measures of quality VR services, diverse ways of adding and measuring trade association value to its members, the components needed for best practices in professional development, and the pillars of ethical advocacy. The research findings further increased OPRA leadership's understanding of the nuanced situation by highlighting discrepancies in experience, a unanimous need for training, and a missing connection with APSE. OPRA leadership is now strategically positioned to increase its value to members by effecting change in employment specialist qualifications. The proposed change meets an identified member and industry need while simultaneously increasing non-dues revenue and member engagement for OPRA.

The literature review and research findings shed further light on methods for trade associations to strategically position themselves as customer-centric, resolving member pain points while simultaneously

embedding themselves in industry matters and increasing financial stability through non-dues revenue. The literature review and research findings also provided new knowledge on employment specialist qualifications and professional development, specifically how the CESP credential impacts every stakeholder within the VR industry. The case is made to support the CESP credential having wide-reaching effects at the state level, agency level, employer level, and individual level. In aligning the trade association's value with member needs and market demands, OPRA leadership truly can impact an industry.

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# APPENDIX A

## Presentation and Authorization Review



### PRESENTATION & AUTHORIZATION REVIEW FORM

The business case presentation identifies the alternative solutions and provides the basis for selecting the

1. To present a business case to the Partner Organization to share the discoveries leading to the identification of alternative solutions and the selection of a test solution(s).
2. To acquire the Organization's acceptance and authorization to move ahead with developing a change management plan in support of the selected test solution(s).
3. To obtain any additional insight, as applicable, from the Partner Organization about potential implications of the test solution(s) to better inform the design and development of the change management plan.

This form accompanies the detailed business case presented by the DeVoe School of Business DBA Student Linsey Hollingshead to their Partner Organization Ohio Providers Resource Association and serves as a record indicating the presentation took place and the level of authorization given for the identified test solution(s) the Student will use when designing and developing the ADP change management plan.

The business case presentation took place on August 15, 2024 (date).

The presentation was conducted online (onsite / online) using the accompanying business case.

The presentation was recorded - no (yes / no).

#### Three Levels of Partner Organization Authorization of the Test Solution(s)

The Partner Organization agrees to the following authorization level for the test solution(s) presented by the DBA Student. The authorized test solution(s) will be used in the design and development of the ADP change management plan. There are three levels of authorization.

Mark one of the following:

X The test solution(s), as presented by the DBA Student, *without modifications*.

The test solution(s), as presented by the DBA Student, but *with modifications*<sup>1</sup>.

A *different test solution(s)*<sup>2</sup> than was presented by the DBA Student.

<sup>1</sup> Any modifications to the DBA Student's original proposed test solution(s) need to be sufficiently described in this document and the bases sufficiently detailed to explain why the modifications are needed. The purpose is to fully support the scholarship and integrity of the Student's doctoral study.

<sup>2</sup> A different test solution(s) authorization requires an explanation of why the original test solution(s) was not selected, identification and description of the replacement test solution(s), and bases for the replacement.



## APPENDIX B

### Institutional Review Board Approval Documents



Institutional Review Board  
4201 South Washington Street  
Marion, IN 46953

Tel: 765-677-1402

#### NOTIFICATION OF APPROVAL TO CONDUCT RESEARCH

NAME OF INVESTIGATOR: Linsey Hollingsead

TITLE OF INVESTIGATION: *Exploratory Study in Vocational Rehabilitation*

IRB ID NUMBER: 2045.24

The Institutional Review Board of Indiana Wesleyan University reviewed your proposal and has reached the following decision.

The proposal has been:

APPROVED

- This approval is valid for one year from the date of this notice. If there are any changes in the project during the year or if the project extends beyond the one-year period, a new proposal must be submitted to the IRB for review.
- All study documents (including completed questionnaires and signed consent documents) must be retained for a minimum of three years from the close of the study. Documents of the student projects must be retained in the students' respective departments.

APPROVED PENDING SUBMISSION OF REVISIONS

NOT APPROVED

All research executed at IWU must conform to all applicable state and federal laws and regulations and to all applicable IWU policies.

Signature:  \_\_\_\_\_ Date: 6/10/24  
Jim Vermilya, PhD  
Chair, Institutional Review Board

## APPENDIX C

### Semi-Structured Interview Questions

1. What are the three biggest barriers to employing more CESP-credentialed staff?
2. What impact has Ohio's CESP requirement had on your agency and the local vocational rehabilitation industry?
3. What role do you expect OPRA to play in advocating, educating, and positioning for change?
4. What other thoughts would you want to share?

## APPENDIX D

### Organization Authorization and Sample Informed Consent



To whom it concerns,

OPRA is allowing Linsey Hollingshead access to the CESP data that we have collected.

Sincerely,

Scott Marks, MSW  
Vice President  
The Ohio Provider Resource Association



## RESEARCH PARTICIPANT CONSENT FORM

*Use this informed consent for studies beginning January 21, 2019 or later*

**Title of Project:** Exploratory Study in Vocational Rehabilitation

**Principal Investigator's Name(s):** Linsey Hollingshead

**Research Advisor's Name(s):** Dr. Sandore Zehr

**Academic Division/Department:** DeVoe School of Business

### Section 1: Purpose of the Research

I understand that the purpose of this study is to explore the impact of the Certified Employment Specialist Professional credential in the vocational rehabilitation industry.

### Section 2: Specific Procedures to be Used

I understand that my participation involves sharing in a semi-structured interview. I will be asked to answer three standard questions and allowed to give any additional information I would like to add. This interview will take place virtually and be recorded.

### Section 3: Duration of Participation

I understand this interview will take 20 minutes, but more time is allowed if needed.

### Section 4: Risks to the Individual

I understand that risks are minimal or similar to everyday life. I may find myself uncomfortable stating negative experiences or thoughts. I understand that I can take breaks during the interview to relieve this or end the interview altogether.

### Section 5: Benefits to the Individual or Others

I understand that there is no benefit for participating in this study.

### Section 6: Compensation

I understand that there is no compensation for participating in this study.

### Section 7: Extra Costs to Participate

I understand there is no cost to me to participate.

### Section 8: Injury or Illness

I understand that interviews are conducted virtually. Should an injury or illness occur, the interview will be immediately stopped and appropriate actions to ensure health and safety will be taken.

I have read this page \_\_\_\_\_ (initials here). Continue to the next page.

**Section 9: Confidentiality**

I understand that my participation is confidential. My name and other identifying information and contact information will not appear in the principal investigator’s published work. I understand that portions of my responses may be used, including direct quotes, but I will only be identified as an “interviewee”. I understand my interview will be recorded. I understand that my recorded responses will be kept on a USB stored in a locked cabinet for 3 years. After 3 years, the USB will be destroyed by the principal investigator. I understand that electronic copies of my signed consent form will be sent to the IRB in one electronic file at the completion of the study. I understand that when required by law, the records of this research may be reviewed by applicable government agencies.

**Section 10: Voluntary Nature of Participation**

I understand that I do not have to participate in this research project. If I agree to participate, I can withdraw my participation at any time without penalty.

**Section 11: Release**

I participate of my own accord in this research project and release any claim to the collected data, research results, publication in any form including thesis/dissertation, journal article, conference presentation or commercial use of such information or products resulting from the collected information.

**Section 12: Contact Information**

The principal investigator is Linsey Hollingshead, linsey.hollingshead@myemail.indwes.edu  
The Research Advisor is Dr. Sandore Zehr, Sandy.Zehr@agsfaculty.indwes.edu

If I have any questions about this research project, I can contact: Linsey Hollingshead

If I have concerns about the treatment of research participants, I can contact the Institutional Review Board (IRB) at Indiana Wesleyan University, 4201 South Washington Street, Marion, IN 46953. (765) 677-2090.

I HAVE HAD THE OPPORTUNITY TO READ THIS CONSENT DOCUMENT AND ASK QUESTIONS ABOUT THE RESEARCH PROJECT, AND I AM PREPARED TO PARTICIPATE IN THIS PROJECT.

Participant’s Signature: \_\_\_\_\_

Participant’s Name (Type or Print): \_\_\_\_\_

Date: \_\_\_\_\_

Investigator’s Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX E

### Individual State Requirements for Employment Specialists

- Alabama—Vocational rehabilitation services, including job development or job placement, are provided directly by the Alabama Department of Rehabilitation Services (Alabama Family Central, n.d.).
- Alaska—All staff must complete state-specific training, but neither job placement nor customized employment requires any advanced training or certification (State of Alaska Division of Vocational Rehabilitation, 2020, 2021).
- Arizona—Specific training for job development is not listed in the Service Provider Requirements policy; however, the policy indicates that specific qualifications are listed in provider contracts (Arizona Department of Economic Security, 2021).
- Arkansas—Community rehabilitation providers must contact Arkansas Rehabilitation Services directly for employment specialist requirements (Arkansas Rehabilitation Services, n.d.).
- California—Employment specialists must meet the qualifications defined in the individual CRP's job description (Community Resources Development, 2023).
- Colorado—Employment specialists wanting to provide supported employment in Colorado must complete ACRE training, obtain a CESP credential, complete Individual Placement and Supports training (IPS) and follow the IPS Model of service delivery, or complete customized employment training (Colorado Department of Health Care Policy and Financing, n.d.).
- Connecticut—Job placement and supported employment services do not require any particular qualifications (Connecticut State Department of Aging and Disability Services, 2019).
- Delaware—The vendor contract expects CRPs in Delaware to employ qualified staff without listing specific qualifications (Delaware Division of Rehabilitation, n.d.).
- Florida—Florida requires a certificate from a state or nationally recognized supported employment program in addition to requiring a combination of work experience and college education for all other VR services (Florida Division of Vocational Rehabilitation, 2021).
- Georgia—Georgia employment specialists must have an associate's, bachelor's, or master's degree in rehabilitation, education, or a related field to provide supported employment services (Georgia Vocational Rehabilitation Agency, 2023).
- Hawaii—Information on employment specialist qualifications was not readily available (Hawaii Division of Vocational Rehabilitation, n.d.).
- Idaho—Idaho does not list staff qualifications in its manual for any services; however, in its form to request more information, there is no question asking if individual providers have completed ACRE training or hold a CESP credential (Idaho Division of Vocational Rehabilitation, n.d., 2023).
- Illinois—Supported employment services in Illinois are delivered specifically to individuals with intellectual and developmental disabilities. These services are part of the state's Medicaid waiver program and require a high school diploma or GED in addition to state-specific training (Illinois Department of Human Services, n.d., 2023).
- Indiana—Employment specialists are not required to have specific individual qualifications; however, Indiana currently has an initiative to increase employment specialist training through a Foundations training based on ACRE principles and mentorship (Indiana Division of Disability and Rehabilitative Services Bureau of Rehabilitation Services, n.d., 2023).

- Iowa—Supported employment services are divided into two categories: job development and job coaching. Each type of supported employment service requires at least one of the following criteria to be met: completion of the Foundations course through APSE plus a two-day in-person training, completion of specified courses from the College of Employment Services, being a licensed educator or paraeducator, obtaining a rehabilitation degree, or acquiring a degree in a closely related field and having approval from the Iowa Vocational Rehabilitation Services Administrator (Iowa Vocational Rehabilitation Services, 2023).
- Kansas—No specific qualifications were noted in the Kansas provider agreement or service description (Kansas Department of Children and Families, 2013, 2023).
- Kentucky—Supported employment services require employment specialists to complete state-specific training within six months of hire and 15 hours of continuing education if the employment specialist does not have a certificate or credential such as a CRC, CESP, ACRE, or Marc Gold Customized Employment (Kentucky Vocational Rehabilitation, 2021, pp. 5–6).
- Louisiana—No qualifications are noted for supported employment services in Louisiana’s technical guidance (Louisiana Rehabilitation Services, 2023).
- Maine—No qualifications noted beyond the agency obtaining CARF accreditation (Maine Bureau of Rehabilitation Services, n.d.).
- Maryland—Supported employment services are provided through the Behavioral Health Administration and the Developmental Disabilities Administration instead of the Division of Rehabilitation Services (Maryland Division of Rehabilitation Services, 2023).
- Massachusetts—Employment specialists need a bachelor’s degree or two years of comparable work or life experience (Massachusetts Rehabilitation Commission, 2013, p. 25).
- Michigan—Supported employment services and job development services do not require specific service provider qualifications; however, customized employment services do (Michigan Labor and Economic Opportunity, n.d., 2023).
- Minnesota—Supported employment is not listed as a distinctive service. Job development services do not require specific service provider qualifications, but customized employment services require ACRE training (Minnesota Employment and Economic Development, n.d.).
- Mississippi—No qualifications are noted in the policy manual (Mississippi Department of Rehabilitation Services, n.d.-a, n.d.-b).
- Missouri—With 11 approved sources of training, including ACRE, college courses, APSE, and the College of Employment Services, all CRP staff are required to complete 14 hours of classroom training and six hours of supervised hands-on learning (Missouri Department of Elementary and Secondary Education, 2023, para. 1).
- Montana—All employment specialists must have a high school diploma or GED as well as two years of related work experience or 30 college credit hours with at least half in a social services-related field (Montana Department of Public Health and Human Services, n.d; 2023, p. 15; Montana Disability Employment and Transitions, n.d.).
- Nebraska—Supported employment services are paid through Medicaid waivers, and employment specialists must complete state-specific training (Nebraska Division of Developmental Disabilities, 2022, p. 98).
- Nevada—Qualification requirements are not readily available (Nevada Rehabilitation Division, n.d.).
- New Hampshire—Qualification requirements were not found in agency service agreements or program information (Hampshire Bureau of Vocational Rehabilitation, n.d., 2019).

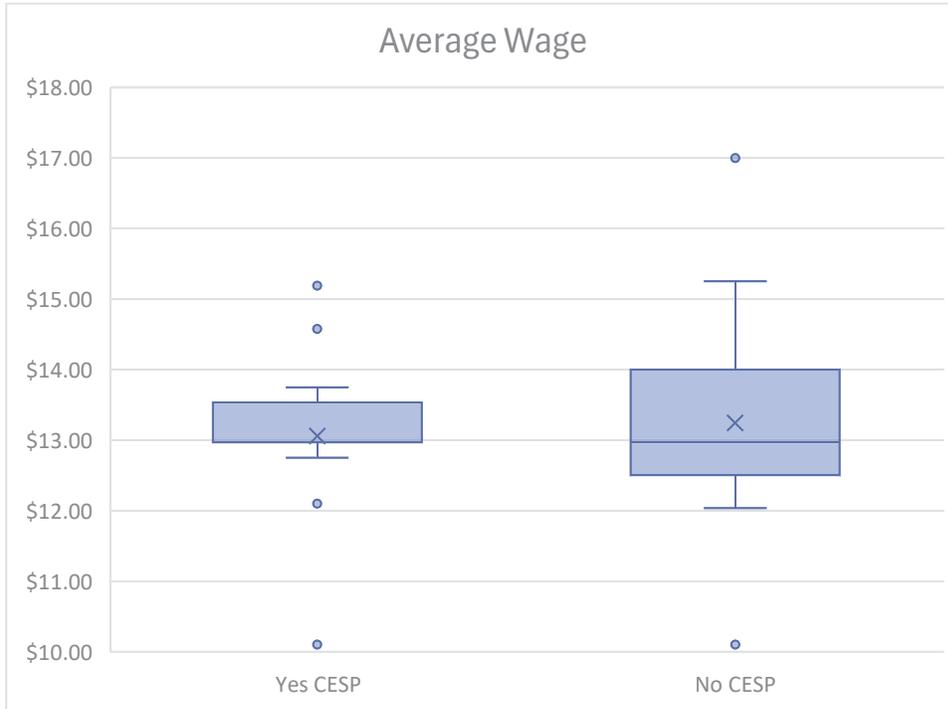
- New Jersey—Supported employment does not require specialized training and is limited to job coaching; however, customized employment services require state-specific training along with two years of related work experience plus completion of a nationally recognized program such as Griffin-Hammis, CESP, or ACRE or a bachelor’s degree in vocational rehabilitation or a related field. (New Jersey Division of Vocational Rehabilitation Services, 2020).
- New Mexico—All employment specialists must meet a minimum educational qualifier of ACRE training or the CESP credential and a minimum experience qualifier of one year of work experience, a bachelor’s degree in a related field, a CRC credential, or a New Mexico Public Education Department licensed rehabilitation counselor (New Mexico Division of Vocational Rehabilitation, 2019).
- New York—Job placement and supported employment services require employment specialists to meet one of the following criteria:
  - a bachelor’s degree, one year of related work experience, and enrollment in state-specific training;
  - a bachelor’s degree, enrollment in a master’s program in vocational rehabilitation or related field, and enrollment in state-specific training; or
  - a combination of education and experience that the state judges as equivalent to the above (New York Adult Career and Continuing Education Services-Vocational Rehabilitation, 2023).
- North Carolina—The policy manual lists no specific training (North Carolina Division of Rehabilitation Services, 2023).
- North Dakota—No specific training was listed in service or operation policies (North Dakota Vocation Rehabilitation, 2019, 2020).
- Ohio—Employment specialists must have earned the CESP credential to provide supported employment services per the provider manual (Opportunities for Ohioans with Disabilities Agency, 2022-c).
- Oklahoma—Employment specialists must complete state-specific training to provide supported employment services (Oklahoma Rehabilitation Services, 2023).
- Oregon—Supported employment services require six months of related work experience or, in lieu of the work experience, an employment specialist may meet one of the following criteria:
  - Bachelor’s degree in Rehabilitation Counseling or Special Education
  - One year of work experience
  - CESP
  - APSE training
  - ACRE training
  - One year of work experience in a related social services field (Oregon Department of Human Services, 2022, p. 29)
- Pennsylvania—Employment specialists must have a CESP, CRC, or ACRE certificate to provide any employment-related services to individuals with disabilities; however, a waiver may be obtained to allow new staff 18 months to obtain the necessary credentials (Pennsylvania Office of Vocational Rehabilitation, 2016, pp. 4–5).
- Rhode Island—No required provider qualifications are specified in the vendor application (Rhode Island Office of Rehabilitation Services, 2024).
- South Carolina—The South Carolina Vocational Rehabilitation Department’s (n.d.) website indicates that department employees provide vocational services instead of CRPs.
- South Dakota—Job development services do not require specific qualifications, and while supported employment services are not specifically listed, customized employment services

have specific qualifications (South Dakota Division of Rehabilitation Services and Service to the Blind and Visually Impaired, 2023).

- Tennessee—In order to provide supported employment services in Tennessee, a service provider must have six months of related work experience, must possess an associate’s degree, bachelor’s degree, or master’s degree, and obtain one of the following in 12 months: ACRE training, CESP credential, or Certified Rehabilitation Counselor credential (Tennessee Department of Human Services, 2020, p. 43).
- Texas—Texas employment specialists must obtain a state-specific supported employment credential through the University of North Texas (Texas Workforce Commission, n.d., 2022)
- Utah—All job development services, including supported employment and customized employment, require the completion of ACRE training (Utah Department of Workforce Services Rehabilitation, 2020, p. 3).
- Vermont—Supported employment services are offered through the Vermont Developmental Disabilities Services Division (2023).
- Virginia—While ongoing training is encouraged, no qualifications are required in the supported employment guide (Virginia Division of Rehabilitation Services, n.d.).
- Washington—CRP employment specialists are required to complete 13 state-specific training modules within 90 days of hire, while self-employed individual providers have two years to obtain an ACRE training certificate or CESP credential (Washington Department of Social and Health Services, 2021, p. 42; 2023).
- West Virginia—Employees of the state VR agency provide employment services (West Virginia Division of Rehabilitation Services, n.d.).
- Wisconsin—Employment specialists in Wisconsin must complete the state’s Supported Employment and Systematic Instruction training in addition to other state-specific required training (Wisconsin Department of Workforce Development, n.d.).
- Wyoming—Supported employment services require employment specialists to achieve a certificate or credential from one of the following: CESP, Dale Dileo Training Resource Network, Griffin-Hammis Associates, National Career Development Association Career Development Facilitator Training, Virginia Commonwealth University of Job Development and Job Coaching Training: Supported Employment Series, or the Wyoming Employment Specialist Training (Wyoming Employment First, n.d.)

## APPENDIX F

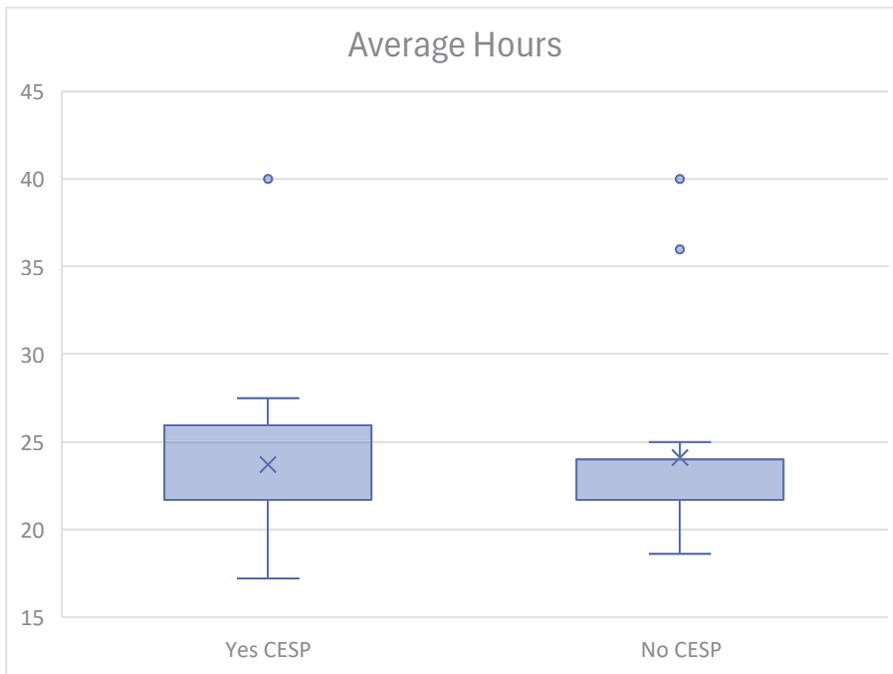
### Additional Descriptive Analysis of Quantitative Data



**Figure F1.** Boxplot of Starting Wage by Specialists' CESP Status

Five-Number Summary	Yes CESP	No CESP
Minimum	10.1	10.1
First Quartile	12.97	12.63
Median	12.97	12.97
Third Quartile	13.16	13.49
Maximum	15.19	17

**Table F1.** Summary of Starting Wage by Specialists' CESP Status



**Figure F2.** Boxplot of Hours by Specialists' CESP Status

Five-Number Summary	Yes CESP	No CESP
Minimum	10.1	10.1
First Quartile	12.97	12.63
Median	12.97	12.97
Third Quartile	13.16	13.49
Maximum	15.19	17

**Table F2.** Summary of Hours by Specialists' CESP Status

## APPENDIX G

### OPRA Employment Outcomes Dataset

Agency	Employee #	CESP	Total Number of Placements	Average Starting Wage	Average Weekly Hours
1	MM02	Yes	5	\$ 12.10	17.2
2	KY01	No	2	\$ 14.00	24
2	CA01	No	1	\$ 15.25	20
2	KS01	No	1	\$ 15.00	25
2	MI01	No	2	\$ 17.00	40
2	MS01	No	2	\$ 12.50	24
2	MI02	No	1	\$ 10.10	36
2	JT01	Yes	1	\$ 10.10	40
3	SC01	No	16	\$ 12.97	21.7
3	JW01	No	16	\$ 12.97	21.7
3	KC01	No	17	\$ 12.97	21.7
3	BP01	No	19	\$ 12.97	21.7
3	MR01	No	9	\$ 12.97	21.7
3	ST01	No	10	\$ 12.97	21.7
3	BC01	Yes	30	\$ 12.97	21.7
3	BC02	Yes	11	\$ 12.97	21.7
3	BD01	Yes	25	\$ 12.97	21.7
3	DR01	Yes	21	\$ 12.97	21.7
3	AS01	Yes	14	\$ 12.97	21.7
3	GW01	Yes	28	\$ 12.97	21.7
3	MD01	Yes	24	\$ 12.97	21.7
3	KF01	Yes	7	\$ 12.97	21.7
3	GK01	Yes	4	\$ 12.97	21.7
4	DB1	No	6	\$ 12.77	22.67
4	PE1	No	3	\$ 12.03	21.00
4	DS1	No	5	\$ 12.21	18.60
4	HA1	Yes	2	\$ 13.75	27.50
4	BB1	Yes	14	\$ 14.58	26.93
4	JD1	Yes	16	\$ 12.75	20.88
4	BR1	Yes	8	\$ 13.72	25.25
4	AW1	Yes	11	\$ 15.19	26.18

**Table 12.** *OPRA Raw Employment Outcomes Dataset*

## APPENDIX H

### Thematic Analysis

#### Barriers to CESP

- 36 CEUs difficult to get
- Needing a year of experience (+3)
- No reimbursement when staff complete trainings for CEUs or study for the test
- No reimbursement for the test fee
- No reimbursement for time for staff to take the test
- People don't stay in the industry
- Applicants don't typically have their CESP
- Not having enough JD referrals to justify the cost
- Passing the test

#### Barriers to Industry

- PRN-style schedules
- Paying staff for work that the agency isn't paid for until the outcome is achieved
- Industry pay is low in general
- Not many people wanting to work in this field

#### CESP is NOT a Barrier to Industry

- CESP has provided opportunities to get more referrals from OOD, financially benefitting the agency
- Willing and capable staff to get CESP and maintain it
- Definitely not a cost issue

#### Agency and Industry Impact

- Agency: Positive
  - Helped us expand into new areas bc the staff had the credential, opened doors to more service expansion, brought credibility to agency and agency employees when working with new VRCs, adding another layer to an already good reputation
  - Staff are excited when they earn the CESP
  - Can presume the employee is better experienced and qualified
  - Getting the CESP opened doors to being able to provide the SE service, increased rev, agency growth
  - Expand services to SE clients
- Agency: Negative
  - An extra thing to do
  - An extra box to check, reimbursement for SE should be higher, don't see the long-lasting impact on staff excitement on earning it
- Industry: Positive
  - more services available to individuals

- Agency/Industry: Neutral
  - No impact, good employees have and don't have the credential, not great employees have and don't have the credential
  - zero impact on outcomes, disconnect between how OOD thinks SE cases will be handled at hand-off to DD than what actually happens, DD supports isn't always available for an SE case (waiver not approved), no consistency in who is assigned to SEJD so non-CESP staff are working with those who are truly SE but no credential

#### OPRA's Role

- Advocate to bring more common sense to the APSE test
- Advocate for test reimbursement – the cost of the test and time away from work to take the test, time to study for the test
- Advocate for higher fees for SE services to incentivize agencies more
- Advocate that OOD and DODD have a more realistic view of how services are actually provided
- Advocate to get rid of the CESP requirement or keep the waiver conditions
- Advocate for DODD and OOD to have CEU material available to providers
- Advocate for more reality-based education to be available
- OPRA offer CESP-approved education, cheap or free
- Offer more CESP/CEU training
- Offer training to pass the CESP test
- Coordinate member agency-provided training
- Offer training opportunities for staff
- They are currently advocating already
- Impressed with OPRA's current advocacy, really listen to concerns
- Attribute waiver to OPRA's advocacy
- Happy with current OPRA advocacy, very grateful to OPRA for the help

#### Other thoughts

- CESP is a great concept, like the idea of a credential
- CESP is a good educational credentialing program
- has made a difference in the way she views things and how she interacts in the whole process of helping somebody find that job. That's the right fit for them. So, it's, it's definitely a good tool
- Sometimes CESP makes a difference in quality
- Need opportunities for employees to earn CEUs that is low cost
- Need assistance in figuring out how to count CEUs
- Need a library of free CEU training courses available
- Have APSE expend what counts towards CEUs
- Feels neutral towards the CESP
- CESP is just one more thing we have to track
- CESP doesn't add value
- CESP adds stress to staff, squeezing in trainings to get the CEU credits
- CESP doesn't impact employee quality
- CESP is a box to be checked

- Hates that CESP was forced down providers' throats loses value
- "I had 2 staff in the last 2 years who were not able to pass the CESP"

# APPENDIX I

## Copyright Permissions

Hey Linsey,

Yes, ok by me, here you go! Let me know if you need a different/better format.

Thanks!



Scott Marks, MSW  
Vice President  
Ohio Provider Resource Association  
1152 Goodale Blvd. Columbus, OH  
Mobile: 614-943-0975

On Feb 5, 2024, at 9:49 AM, Linsey Hollingshead <[lhollingshead@aboutpieinc.com](mailto:lhollingshead@aboutpieinc.com)> wrote:

Hey Scott,  
I was wondering if I could have permission to use the OPRA logo within this report that I am working on. Thoughts? If this is allowed, could you send the logo to me?

Thank you,

[Linsey Hollingshead, CESP](#)

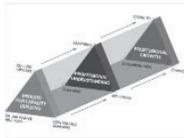
Sandy Youmans <[sandy.youmans@queensu.ca](mailto:sandy.youmans@queensu.ca)>

To: Hollingshead, Linsey

Cc: Lorraine Godden <[LorraineGodden@cunet.carleton.ca](mailto:LorraineGodden@cunet.carleton.ca)>

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Hello Linsey,

Yes, as the authors of the paper, you have our permission to use the graphic for the Coalition Model for Professional Development. I am attaching an image of the graphic for your use. Please send us your work when you are done. We would love to read it!

We have also been involved with the development of a new professional development framework called, Co-constructing professional development. Hopefully, we get our next paper published soon. Let me know if you would like me to share it with you once it's in print.

All the best,

Sandy Youmans, OCT, PhD  
Continuing Adjunct Professor  
Faculty of Education, Queen's University



### The coalition model for professional development

Author: Alexandra Youmans, Lorraine Godden, , et al

Publication: Teachers and Teaching

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