

## IMPACT OF AGENCY-WIDE BUSINESS DEVELOPMENT TRAINING

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### **A Mixed-Methods Assessment of the Impact of an Agency-wide Business Development Training for Rehabilitation Counselors**

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## Abstract

The purpose of this study was to evaluate the effectiveness of a business development training provided to counselors within four vocational rehabilitation (VR) agencies for the blind. We went beyond traditional measures of participant change to evaluate changes in actions and behaviors of both the agencies and the counselors, utilizing qualitative and quantitative data collected over the 18-month period of the study. All agencies reported taking actions associated with the training. Although counselors across all agencies did not increase their business development activities, counselors within one agency did. Potential reasons for the improvements observed within this agency are discussed.

**A Mixed-Methods Assessment of the Impact of an Agency-wide Business Development  
Training for Rehabilitation Counselors**

Business development involves working with employers to increase employment opportunities for consumers with disabilities. Employer engagement and job development, two concepts related to business development, are considered essential knowledge domains for rehabilitation counselors (Leahy et al., 2019; Leahy, Muenzen, Saunders, & Strauser, 2009). The importance of business development for vocational rehabilitation (VR) agencies is not a new idea (Fry, 1997; Gilbride & Stensrud, 1999), but the Workforce Innovation and Opportunity Act (WIOA) significantly increased the focus on working with businesses. VR agencies were mandated by WIOA to build capacity to provide services to employers, and are now being evaluated as to their effectiveness in serving employers. The Council of State Administrators of Vocational Rehabilitation and the National Employment Team support a dual customer approach to working with businesses, meaning that employers, as well as individuals with disabilities, are important customers of the VR system. When working with businesses under the dual customer approach, the goal is to establish long-term relationships that involve addressing the business' workforce needs. Many other groups and individuals have endorsed the use of the dual customer approach when working with businesses (Anderson et al., 2006; Haines et al., 2018; Luecking, 2008; Moore et al., 2018).

Although empirical evidence documenting the effectiveness of business development activities is limited, some research has supported the value of this activity. One study that combined VR Case Service Report data (RSA-911) with data collected from VR professionals documented that consumers served by agencies in which VR counselors reported greater use of dual customer approach techniques were more likely to obtain employment with a business upon

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case closure (McDonnall, 2016). A recent study documented that a one-hour meeting between a VR professional and an employer resulted in positive improvements in (a) employers' attitudes towards people who are blind or have low vision as employees, (b) knowledge about how they complete work tasks, and (c) intent to hire (McDonnall & Antonelli, 2020). Improvements in attitudes are particularly important considering that employer attitudes about people who are blind as employees were associated with having hired people who are blind or have low vision (McDonnall, 2018; McDonnall & Antonelli, 2019).

Despite the importance of working with employers and the emphasis currently placed on it, many VR counselors are not comfortable with this activity (Fleming, Phillips, Kaseroff, & Huck, 2014; McDonnall, 2017; Schultz, 2008). They acknowledge that working with employers is important, but many do not feel well-prepared to conduct business development activities (Beveridge, Leconte, Shaine, Del Toro, & Penrod, 2015; McDonnall, 2017). Lack of counselor preparation for these activities has also been reported by VR agency administrators (Chan et al., 2017; McDonnall, 2017). Although WIOA does not specifically mandate that counselors work with employers and most agencies have designated business development staff, a majority of agencies also expect counselors to conduct business development activities (Haines et al., 2018; McDonnall, 2017). In addition, smaller agencies, particularly many agencies for the blind, tend to have few or no business development staff (U.S. Government Accountability Office, 2018), leaving the primary responsibility for working with employers to counselors.

Given VR counselors' lack of comfort and preparation in this area, we developed a business development training specifically for VR counselors who work with consumers who are blind or have low vision. The purpose of our training was to help agencies and counselors increase their capacity to effectively work with employers, with the ultimate goal of improving

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consumers' employment opportunities. For a business development training to bring about actual behavior change in counselors, the agency work environment must support their interactions with employers.

Underlying agency-level issues may limit counselors' involvement in business development, including perceived lack of support from leadership (Schultz, 2008) and time constraints due to large caseload sizes (Fleming et al., 2014; McDonnall, 2017). As Rudstam and colleagues (Rudstam, Hittleman, Pi, & Strobel Gower, 2013) indicated, training must address the knowing-doing gap – in other words, training should go beyond disseminating information to focusing on bringing about change in behaviors. Accordingly, improving counselors' knowledge about how to conduct business development activities might not be sufficient to increase these activities. To facilitate increased business development activities among counselors, we believed it was important to facilitate change, as needed, at the agency level. For this reason, we incorporated a technical assistance component for agency administrators within our business development training for counselors.

The purpose of this study was to (a) evaluate the effectiveness of the business development training and associated technical assistance, utilizing data that went beyond traditional outcome measures of change within participants, and (b) identify factors that might impact training effectiveness by agency. Previous studies evaluated the immediate and longer-term impact of the training on participant-reported measures of self-efficacy, knowledge, and use of the dual customer approach, as well as self-perceived knowledge, skill, and comfort (McDonnall & Sui, 2019; McDonnall, Cmar, & Tatch, 2020). For this study, we utilized mixed methods to evaluate the longer-term impact of the training on the agency and the actual behaviors of participants.

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## **Method**

The researchers' university's institutional review board (IRB) determined that this study was not human subjects research and exempted it from IRB review. We identified four agencies that were interested in receiving the business development training and willing to participate in the research study. All four agencies were separate agencies for the blind, although this classification was not a requirement for participation. The agencies were spread across the United States, located in the Northeast, South, Midwest, and West regions. Participants were rehabilitation counselors and administrators of these agencies.

## **Participants**

### ***Training***

The original 90 training participants were employed in counselor or counselor supervisor positions and carried active caseloads or were involved in business development activities. For this study, we included the 69 participants who participated in at least two-thirds of the training, worked directly with consumers, had valid data, and were responsible for business development activities. Some participants joined the study after the first survey and some left their agencies before the end of the study; therefore, for this study, the sample size was 62 at pretest and 57 at the end of the study. A majority of participants were female (76.8%,  $n = 53$ ) and held a master's degree in rehabilitation counseling (52.2%,  $n = 36$ ). Almost half of the participants were White (49.3%,  $n = 34$ ), 26.1% ( $n = 18$ ) were Black/African American, 14.4% ( $n = 10$ ) were Hispanic, 5.8% ( $n = 4$ ) reported 'Other' race or multiple races, 2.9% ( $n = 2$ ) were Asian American, and one person did not answer the race/ethnicity question. Participants' ages were: 20 to 29 (17.4%,  $n = 12$ ), 30 to 39 (20.3%,  $n = 14$ ), 40 to 49 (29%,  $n = 20$ ), 50 to 59 (23.2%,  $n = 16$ ), and 60 or older (10.1%,  $n = 7$ ). Years of experience as a rehabilitation counselor ranged from 0 to 42, with an

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average of 8.22 ( $SD = 9.05$ ).

### ***Follow-up Interviews***

One or more administrators per agency participated in an interview with the lead researcher approximately six months post-training. Positions held by the administrators included deputy director, assistant director, coordinator of VR services, VR program manager, and rehabilitation field services chief. A purposive sample subset of training participants took part in separate interviews approximately seven months following the training. These eight interview participants (two per agency) were identified by agency administrators or supervisors as counselors who particularly benefited from the training, increased their business development activities after the training, or both.

### **Procedure**

Agency administrators provided contact information for their counselors who were eligible to participate in the study. We contacted participants 2 to 4 weeks prior to the start of the study to invite them to participate, explaining the purpose of the study and that ongoing participation via the completion of additional online surveys would be requested. The total duration of the study was 18 months, with Agency 1 and 2 receiving the training following the first survey, and Agency 3 and 4 receiving the training nine months later.

Counselor participants completed the 19-hour in-person business development training, which was presented by four trainers over three or four days, depending on agency preference. The training curriculum was based on (a) the dual customer approach curriculum that the former Texas Department of Assistive and Rehabilitative Services (TX DARS), Division of Blind Services (now the Texas Workforce Commission Vocational Rehabilitation Services) used to train its staff and (b) results from a 5-year research project conducted by the first author that

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investigated how VR agencies interact with businesses and the outcomes of those interactions. The TX DARS's curriculum was selected because the agency had a strong business development program that included providing formal training to all staff on working with employers. They were willing to share their curriculum and partner with the researchers to implement the training with other VR agencies. The training provided information about how to work with businesses using the dual customer approach: focusing on employers' needs, addressing those needs, and developing relationships with them. A primary goal of the training was to help counselors recognize that they have the skills needed to work with businesses to increase their comfort level and confidence with this activity. During the training, counselors shared information with the trainers about barriers within their agency to working with businesses and ideas for addressing those barriers. Detailed descriptions of the training curriculum are available in earlier publications (McDonnall & Sui, 2019; McDonnall, Cmar, & Tatch, 2020).

Prior to the training, the lead researcher spoke with an administrator from each agency to learn about their current business development practices and procedures, including expectations for their counselors. Technical assistance was provided to agency administrators in the form of a written report submitted within two weeks of the training. The report included information about (a) counselors' perceptions of agency support and encouragement for business development activities, (b) the barriers counselors reported experiencing to business development, (c) agency-specific recommendations for increasing business development activities based on information learned from counselors during the training and from administrators prior to the training, and (d) specific suggestions provided by counselors during the training about how the agency could better support their business development efforts.

### **Data Collection**



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Quantitative data was collected from training participants via online or phone surveys that were conducted quarterly throughout the 18-month study. Three comprehensive surveys were administered to all participants at the beginning, middle, and end of the study. For this study, survey items that were directly related to participants' business development perceptions and activities were included: (a) agency and supervisor support and encouragement for business development activities, (b) perceived importance of their business development activities to consumers' employment, (c) percentage of work time spent on business development activities, and (d) the frequency of performing specific business development activities.

Participants reported the frequency of their business development activities on a quarterly basis, with data collected seven times during the study (three times within the comprehensive surveys and four additional times between these surveys). These business development activities could be classified into three categories: preparatory activities (attending community events and networking events), employer contacts (meeting with a new employer and following up with a previous employer contact), and impact of employer contacts (consumer participation in interviews and jobs obtained). During the training, participants provided data via an audience response system (i.e., clickers) regarding barriers to conducting business development activities: "can't barriers" (agency practices or policies get in the way), "won't barriers" (person is not comfortable and/or committed), "don't know how barriers" (person lacks the necessary knowledge or skills), and lack of time (Rudstam et al., 2013). See Table 1 for the survey items and in-training questions pertinent to this study.

The first author conducted structured interviews to collect qualitative data from agency administrators and counselors who participated in the training. Modeled after Rudstam and colleagues' (2013) key action analysis, administrator interviews focused on actions the agency

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had taken as a result of the business development training and associated technical assistance, factors that facilitated and inhibited taking action, and any counselor behavior change observed. The interviewer took precise notes during the administrator interviews, which lasted between 15 and 25 minutes. The counselor interviews focused on how the training affected them personally and how it impacted the agency. The counselor interviews lasted between 15 and 45 minutes and were recorded and transcribed by a transcription service. See Appendix A for a list of administrator and counselor interview questions.

### **Data Analysis**

To analyze the quantitative data, we utilized SAS 9.4 to compute descriptive statistics. Means and standard deviations were used to summarize participants' survey responses and percentages to describe the types of barriers identified by participants from each agency. Means and standard deviations were utilized to summarize participants' pre-training and post-training business development activities and quarterly averages to illustrate the changes in these activities over time by agency. We also computed the percentage of participants reporting no activity for each business development activity variable for each agency during the pre- and post-training periods.

To analyze the qualitative data, we used a directed content analysis approach (Hsieh & Shannon, 2005). The two authors independently reviewed the administrator interview notes and counselor interview transcripts multiple times. The coding process included concept-driven (deductive) and data-driven (inductive) elements (Kuckartz, 2019). The interview questions provided the framework for the first round of coding, in which we used a deductive approach to code data segments line-by-line into broad categories by highlighting text that corresponded to the categories. For the second round of coding, we identified emerging themes within each

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category and selected representative examples from the data. After independently coding the data, we discussed the coding scheme, refined the categories and themes, extracted quotations from the transcripts that supported the themes, and identified similarities and differences within and between agencies. The categories for the administrator data corresponded to the interview protocol: (a) agency-level impact and actions, (b) facilitators and inhibitors of action, and (c) changes in counselor behavior. The final categories for the counselor data were (a) individual-level impact and changes, (b) agency-level changes, and (c) challenges to increasing business development activities. Methods employed to promote the validity, or trustworthiness, of the results include (a) triangulation through the use of multiple sites and informants (Shenton, 2004), (b) double-coding of all data by two researchers (Elo et al., 2014), and (c) using participant quotations to illustrate connections between the data and results (Elo et al., 2014).

### **Results**

#### **Training Participant Survey and In-training Responses**

Training participant responses to the questions posed during the training regarding types of barriers experienced are presented in Table 2, along with agency factors pertinent to this study. Lack of time was the most common barrier identified, followed by don't know how barriers, and can't barriers. Won't barriers were much less frequently reported. Training participant responses to survey items at the beginning (month 0) and end (month 18) of the study are provided in Table 3.

#### **Business Development Activities**

The business development activity variables have a positively skewed distribution with a high percentage of zeros for some variables and agencies. Quarterly business development activities over time by agency are depicted in Figures 1 through 6. The quarterly frequency of

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these activities tended to differ slightly across agencies but was also variable over time within agencies. To help assess the impact of the training on counselor behavior change, Table 4 provides average quarterly business development activity data and the percentage of participants with no activity by agency before and after the training. There were few noticeable increases in business development activities pre- and post-training across the agencies, with the exception of Agency 1 having a substantial increase in new employer contacts and a smaller increase in consumer interviews obtained. In Figures 3 and 4, these increases can be observed as a positive trend of gradual increase in these behaviors among counselors in Agency 1 following the training.

### **Administrator Interviews**

#### ***Agency-Level Impact and Actions***

Administrators from each agency reported taking multiple actions following the business development training and associated technical assistance. Three types of actions emerged from the data: (a) knowledge-sharing, support, and collaboration; (b) changes in agency practices or policies; and (c) resource development or integration. Many of the actions were based on recommendations from the technical assistance report provided to each agency.

**Knowledge-Sharing, Support, and Collaboration.** Administrators from all four agencies reported at least one action related to sharing information about business development, supporting counselors' business development efforts, or collaborating with outside entities. In Agencies 1 and 3, administrators added business development to the agenda for recurring staff meetings. The administrator from Agency 2 reported sharing business outreach results with counselors to highlight their successes. Administrators from two agencies reported increases in staff communication related to business development: more interaction among staff members in

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general (Agency 1) and improved relationships between counselors and business relations specialists (Agency 2). Administrators from two agencies took specific actions to help new counselors learn about business development: Agency 1 started a formal mentoring program, and Agency 4 began having new counselors shadow their business relations specialists. The Agency 2 administrator told supervisors to emphasize the importance of business development activities and give counselors praise for their efforts, and Agency 4 focused on increasing support and encouragement for business development efforts. The training helped Agency 4 further develop an emerging relationship with a WIOA partner, and two counselors from that agency collaborated with employers and consumers to submit a proposal related to hiring people with blindness or low vision for a state conference.

**Changes in Agency Practices or Policies.** Administrators from all four agencies reported at least one change in agency-level practices or policies related to increasing capacity for business development or improving relationships with businesses. Administrators from Agencies 2, 3, and 4 reported actions related to hiring or task redistribution: hiring VR assistants, attempting to reallocate some tasks from counselors to other staff, and getting approval for a new business relations specialist position. Agencies 1, 2, and 4 made changes related to training: providing time management training for counselors, focusing more on job development and business relations for training, and providing training to contractors related to job development for blind consumers and services the agency can provide to businesses. Administrators from Agencies 2 and 4 added or planned to add performance measures for counselors related to business development activities, although one already intended to do so before the training. Agency 4 sponsored its first annual job fair for consumers who are blind or have low vision.

**Resource Development or Integration.** Administrators from three agencies (Agencies

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1, 3, and 4) reported developing, utilizing, or acquiring new resources. They indicated that their staff members were using tools and resources shared during the training. Agencies 3 and 4 developed new brochures for businesses. The training and technical assistance helped Agency 3 expedite the process of providing counselors with off-site case management system access.

### *Facilitators and Inhibitors of Action*

Several factors facilitated agency-level actions to improve relationships with businesses. Agencies 1, 2, and 4 demonstrated an agency-level commitment to business development. Supervisor and staff buy-in was also evident in Agency 1, whose administrator reported that the training provided momentum to further the agency's business development efforts. Agency 4 staff reportedly requested business development training, indicating an interest in expanding their skills. Facilitators of action for Agency 2 included connections with technical assistance centers, collaboration with the general VR agency, and the WIOA mandate, which facilitated the agency's creation of a business relations unit. Having examples of brochures from other agencies (provided by the first author upon request after the training) helped Agency 3 staff design their brochure.

Administrators from all four agencies identified multiple factors that inhibited their agency from taking action to improve business development. Lack of time was a common concern across all agencies. Other inhibitors included WIOA-related changes or demands (Agencies 1, 2, and 4), including the implementation of a new case management system in two of these agencies; staff turnover and vacant positions (Agencies 3 and 4); and lack of or inadequate resources such as the agency website, brochures, and business cards (Agencies 3 and 4).

### *Changes in Counselor Behavior*

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Administrators from all four agencies noticed positive changes in their counselors' behavior following the training, such as (a) increased comfort and confidence when interacting with employers; (b) more effort, motivation, and willingness to interact with employers; and (c) greater enthusiasm about business development. In Agencies 1, 3, and 4, administrators reported that counselors also had more frequent discussions related to business development.

### **Counselor Interviews**

#### *Individual-Level Impact and Changes*

All eight counselors identified two or more ways in which the training impacted their work activities or changes they made in response to the training. Six counselors, representing all four agencies, developed greater awareness of business development and employers' needs. They reported being more mindful or conscious of the need to do business development and seeking out opportunities to connect with businesses. Several changed their approach to business development by focusing on the employer more than the consumer. For example:

I would say that I'm more mindful of the employer after the training. I knew they were a big part of what I do, what I strive to do for my clients, but that dual customer approach was more—it hit home more after the training.

Six counselors, at least one from each agency, reported increases in comfort, confidence, or motivation. Five counselors, also representing all four agencies, reported performing more business development activities after the training. Examples include increases in networking, employer contacts, and research about getting involved in the community. When explaining how the training impacted his work activities, one counselor stated:

It's increased my workload, but actually, it has increased it in a good way because I am more involved with doing the business services activities. I think I'm getting the agency's

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name out there more and also meeting with other professionals who do the same thing in other VR programs.

Four counselors from Agencies 1, 2, and 3 reported using new business development tools or resources from the training, including conversation starters, an employer contact log, a job analysis form, and their states' online labor market information system. One counselor (from Agency 2) used the knowledge and tools obtained from the training when talking with administrators from a local organization that provides job development services for the agency, to share with them the resources her agency could provide to businesses interested in hiring their consumers. Three counselors from Agencies 1 and 2 indicated that the training gave them a blueprint for conducting business development activities, which they described as “a specific model to follow,” a “foundational piece,” and “step-by-step” guidance for how to approach businesses.

### *Agency-Level Changes*

Four of the eight counselors identified at least one change at the agency level. Both counselors from Agency 1 reported changes in knowledge-sharing, support, and collaboration related to business development, including monthly phone calls, increased discussion and collaboration among counselors, and supervisor support. In summarizing these positive changes, one counselor stated, “agency-wide we’re starting to really come together more and collaborate more.” For Agency 2, one counselor reported that the agency had hired VR assistants for some offices to allow counselors time for other activities, such as business development. The other counselor from Agency 2 did not perceive any agency-level changes. One counselor from Agency 3 mentioned the creation of a new brochure for businesses but otherwise did not identify any agency-wide changes. The other Agency 3 counselor indicated that staff turnover disrupted



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the agency's initial positive momentum to implement changes after the training: "There was great energy in it, but then, of course, it fizzled out when our caseloads almost doubled. So, it's on hold until we are fully staffed." Neither counselor from Agency 4 perceived any changes at the agency level; one actually felt less pressure to do business development activities, and the other indicated that business development is part of the job description: "it's just something we're hired to do."

### *Challenges to Increasing Business Development Activities*

Six counselors, representing all four agencies, indicated that lack of time was a prevalent challenge to conducting or increasing their business development activities. Three of those counselors expressed difficulty prioritizing business development because they had many other day-to-day responsibilities (e.g., case notes, paperwork). One counselor described additional time constraints associated with learning how to use the agency's recently-adopted case management system. Finding time for business development appeared to be particularly challenging for the counselors from Agency 3 due to the increase in the size of their caseloads as a result of vacant positions. According to one Agency 3 counselor, business development "has taken a back burner" in that agency. Two counselors (from Agencies 1 and 3) identified having few job-ready consumers on their caseloads as another challenge, although they both appeared to recognize that they could begin making connections and developing relationships with employers in the meantime. One of these counselors indicated that her current caseload required her to focus most of her time and energy on meeting consumers' needs rather than on business development. The other one specifically mentioned a concern about establishing new connections with employers while not having any job-ready consumers to refer to those employers. Three counselors (from Agencies 1 and 4) reported geographical or logistical

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challenges, such as covering multiple rural counties, lack of transportation, and difficulty attending after-hours events due to living and working in different communities.

### **Discussion**

When evaluating the effectiveness of a training, it is valuable to consider the broader context in which the participants work and the expectations in that context. This study utilized non-traditional methods, including both quantitative and qualitative data, to assess the impact of an agency-wide business development training for VR counselors that was successful at bringing about self-reported change within participants (McDonnall, Cmar, & Tatch, 2020). To further evaluate the effectiveness of the training, we assessed change in behavior of participants and actions taken by agencies (Rudstam et al., 2013). A unique aspect of the training itself was the inclusion of a technical assistance component for VR agency administrators, which addressed agency context and encouraged actions that support counselors' business development activities.

Substantial differences between agencies were noted in multiple areas, both before and after the training, including (a) agency size, (b) business development approach, including whether they employed staff who were responsible only for working with businesses, (c) counselors' perceived barriers to working with businesses, (d) perceived amount of agency and supervisor support and encouragement for business development, (e) counselor turnover, and (f) external challenges that occurred during the study. These differences resulted in a distinct context within each agency that impacted the counselors' perceptions and the effectiveness of the training in facilitating actual changes at the counselor and agency levels.

Positive changes in agency and supervisor support and encouragement for business development would have supported the effectiveness of the training. However, counselors did not perceive increases in these areas during the 18-month study. In fact, perceptions of support

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and encouragement decreased slightly in two agencies (Agencies 2 and 3), even though Agency 2 administrators reported trying to provide more encouragement to counselors after the training. Counselors' perceived importance of their business development activities to consumers' employment success was high, and fairly similar, across agencies at the beginning of the study. However, the perceived importance of their business development activities decreased in three agencies by the end of the study. In addition, counselors in two of the three agencies (Agencies 2 and 3) exhibited large decreases in their average estimated percentage of time spent on business development activities, while time spent remained the same for the other agencies.

Agency 2, in particular, exhibited a large decrease in counselors' perceived importance of their business development and a 70.8% decrease in time spent on business development. During the study, Agency 2 established a new business development program and filled several business development-focused positions, which may explain these changes. Counselors may have perceived less importance of their own business development activities because other staff within the agency now had that primary responsibility. Another factor related to the large decrease in time spent on business development for Agency 2 counselors may be the many competing demands associated with the implementation of WIOA reported by the agency administrator. Agency 3 also exhibited a large decrease in time spent on business development activities, which can be explained by the vacant positions present in the small agency, requiring many counselors to carry double caseloads.

Although our prior study documented that self-perceived knowledge, skills, and comfort related to business development increased after the training and remained at a higher level for counselors across agencies (McDonnall, Cmar, & Tatch, 2020), counselors' average participation in actual business development activities generally did not increase across agencies. While the

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average number of business development activities by agency pre- and post-training did not support a positive impact of the training, except for Agency 1's increases in new employer contacts and consumer interviews, the percentage of staff reporting quarterly participation in the six activities increased noticeably for both Agencies 1 and 2.

Though increases in counselor business development activities after the training were limited, all agencies took some actions associated with the training, including increasing discussion around business development and/or providing more support or encouragement for the activity. Agency administrators reported making at least one change to practices or policies relevant to supporting business development efforts that were recommended in their technical assistance reports. All agency administrators also reported that they observed positive changes in counselors following the training, including increased confidence, comfort, and motivation for business development activities, which was also supported by the counselor interviews.

In the interviews, counselors reported benefits of the training, including that it gave them a model to follow for business development activities. The most common barrier identified by counselors at the beginning of the training, following lack of time, was "don't know how;" in other words, they did not believe they were adequately prepared to engage with businesses. The training provided that knowledge and helped them understand the dual customer approach in action. While the general concept of the dual customer approach is well known in VR, many counselors do not know how to operationalize it, and this training provided that knowledge. Despite the lack of a consistent increase in the number of employer contacts across agencies, these findings suggest that training participants are now well-prepared to contact employers and have increased confidence and comfort with the activity, which may lead to higher quality contacts with employers. Use of the evidence-based approach recommended in the training may

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result in counselors being more effective at building long-term relationships with businesses. Future investigations of this nature may benefit from including measures of quality, in addition to quantity, of business development activities. Future research would also benefit from the inclusion of objective measures of agency improvement, in addition to the self-report measures used in this study.

In some cases, counselors did not perceive changes, or were not aware of all actions, reported by agency administrators. Although agency administrators reported trying to increase discussion of and support for business development activities, counselor responses to survey items regarding agency support and encouragement for business development activities and counselor interview responses for Agency 4 did not indicate that the counselors perceived increases in these areas. The Agency 1 administrator and counselors agreed about increases in discussion and collaboration surrounding business development after the training, but counselors from other agencies did not perceive such changes. One counselor from Agency 2 and both counselors from Agency 4 were not aware of any agency changes following the training.

Both administrators and counselors reported inhibitors of action, or challenges, to business development activities. As described in other studies (Fleming et al., 2014; McDonnall, 2017), lack of time is a common challenge to business development that was well-documented in this study. It was overwhelmingly the barrier most commonly reported during the training and by 75% of the counselors in the interviews. VR counselors have always had multiple competing demands that make business development challenging (Leahy, Chan, & Saunders, 2003; Leahy et al., 2009), but some additional inhibitors occurred during the study that further reduced counselors' available time. As documented for VR agencies elsewhere (Sherman et al., 2019; U.S. Department of Education, 2020), participating agencies reported changes associated with

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WIOA that demanded counselors' attention (e.g., new paperwork and documentation, new case management systems) and two agencies experienced a significant amount of counselor turnover. Counselors in Agency 3 in particular were negatively impacted by high staff turnover in their small agency and the resulting larger caseloads. Ironically, WIOA requirements for increased employer engagement created a demand for the training, but WIOA-related demands resulted in challenges to counselors implementing what they learned in the training.

So was the training effective at changing agency and counselor behaviors associated with business development? Our findings were mixed. The quantitative data did not provide substantial support for training effectiveness (except for Agency 1), but the qualitative data supported positive changes within the counselors and agencies. The qualitative data also provided context for the results observed in the quantitative data, and illustrate some of the differences for Agency 1 that may explain their more positive results. Agency 1 had (a) no staff turnover during the study; (b) only one counselor who perceived agency-associated barriers to business development; (c) a pre-existing agency culture that focused on working with employers; (d) increased communication and collaboration around business development activities after the training, including creating a formal mentoring program; and (e) provided time management training to counselors to help address the lack of time barrier. In addition, although not reflected in the data, Agency 1 had a "champion" of business development activities. This counselor, who was one of the interviewees, was enthusiastic about business development and eager to learn how to engage with employers. The training provided him this knowledge, and his motivation and enthusiasm may have encouraged other counselors within the agency.

### **Implications**

Our findings suggest that simply providing a business development training to counselors

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within an agency may not be enough to result in changes in counselor behavior surrounding business development. Agencies must be willing to incorporate changes, as needed, that will facilitate counselors' business development efforts and become a part of agency culture. After a business development training, providing ongoing supports such as mentoring, additional training (e.g., in time management), and regular staff discussions about business development may encourage counselors' efforts. Setting clear expectations for counselors' engagement in business development activities, communicating these expectations to the counselors, and using performance measures to track these activities may help administrators and supervisors facilitate culture change. It is also vital that agencies eliminate the barriers associated with their policies and practices that make business development difficult for counselors. Communicating with counselors to determine what barriers they perceive is the first step. Agencies should recognize that culture change may be difficult and take considerable time (Alvesson & Sveniingsson, 2008), and some current staff may be resistant to increasing their business development activities. Having counselor buy-in regarding the importance of business development activities is essential, and our results suggest that having a champion within the agency may be important. Another major challenge that must be addressed by agencies is the time factor – do counselors within the agency actually have time for this activity? In smaller agencies, counselors may be the only staff available to do this activity. Agency administrators should thoughtfully consider what a realistic expectation is for business development activities, given other demands of the counselors. However, it is relevant to note that three-quarters of the counselors from Agency 1 reported that lack of time was a barrier to engaging with businesses, yet increases in some business development activities were observed in this agency.

Several inhibitors of action documented in this study suggest that the timing of a training

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may be an important consideration in promoting the translation of knowledge into quantifiable behavioral change. In this particular study, the research design and study protocol influenced the scheduling of the training. When planning future business development training, consider factors such as counselors' workloads and any major ongoing or anticipated agency-level changes. Scheduling the training to avoid competing demands to the greatest extent possible will provide more opportunities for counselors to focus on implementing what they learned.

### **Limitations**

This study has several limitations that should be acknowledged. It is based solely on self-report data, including counselors' reports of their number of quarterly business development activities. The numbers provided may be estimates rather than based on records of actual activities or time spent on business development. Qualitative responses may have been influenced by socially desirable responding. Administrator interviews were based on contemporaneous notes rather than transcribed recordings, making it impossible to recheck statements or utilize exact quotes. Although agency administrators were specifically asked about changes that occurred associated with the training, some of the changes they reported may have occurred without the training. Staff turnover resulted in missing data, and some participants started the study but did not complete it, while some began participating after it commenced. This issue may be relevant when comparing pre-training and post-training data and data collected at the beginning versus the end of the study, as some people were not present at both time points or periods. For agencies that received the training first (Agency 1 and Agency 2), there was only one time point for the pre-training business activity data, and that quarter may not be representative of the average amount of business development activities for those agencies. Agencies 3 and 4 received the training at month nine of the study, and therefore had less time to



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make progress towards increased business development activities after the training. Finally, results from this study may not generalize well to combined or general agencies as all agency participants were separate agencies.

### **Conclusions**

This study documents the broader impacts of a business development training for rehabilitation counselors, including the contextual factors that may inhibit or facilitate behavior change. Agency-level policies and procedures can impede training effectiveness, and administrators must be willing to make agency-wide changes to reduce barriers and support counselors' participation in business development activities. Key factors that appear to have facilitated training effectiveness include having an agency culture that endorses the importance of business development, conveying clear expectations for counselors' engagement in this activity, and having counselors buy into the importance of business development. A final consideration for supporting an increase in business development activities among counselors is addressing time constraints and determining how counselors can balance these activities with their other job demands. Our findings illustrate the importance of considering agency context and external factors when evaluating training effectiveness and the complexities associated with generating agency-wide change.

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Table 1  
*Survey Items, Business Development (BD) Activity Questions, and In-Training Questions*

Measure	Item
Participant survey	Support and encouragement <sup>a</sup>
	How much support does your agency provide for you to conduct BD activities?
	How much support does your direct supervisor provide for you to conduct BD activities?
	How much encouragement does your agency provide for you to conduct BD activities?
	How much encouragement does your direct supervisor provide for you to conduct BD activities?
	Rate the importance of your BD activities to your consumers' success in obtaining employment. <sup>b</sup>
BD activities	What percentage of your work time is devoted to BD activities?
	Preparatory activities
	How many community events did you attend in the past 3 months (such as Lion's Club, Rotary Club, Toastmasters, local organization meeting)?
	How many networking events (such as Chamber of Commerce events, job fairs, human resource management organization meetings) did you attend in the past 3 months?
	Employer contacts
	How many new employers did you meet with (in their office) in the past 3 months?
	Of employers you previously met with, how many follow up contacts did you make in the past 3 months?
	Impact of employer contacts
	How many consumers received an interview through your business contacts in the past 3 months?
	How many consumers received a job through your business contacts in the past 3 months?
In-training questions <sup>c</sup>	Do you feel that there are agency policies or procedures in place that make it difficult to work with businesses? (can't barriers)
	Do you dislike working with businesses, feel uncomfortable working with businesses, or believe it isn't important, and resist this activity for one of those reasons? (won't barriers)
	Do you believe that you have the knowledge and skills needed to work effectively with businesses? (don't know how barriers)
	Does lack of time limit your ability to work with businesses?

<sup>a</sup> 1 = None, 2 = A little, 3 = A moderate amount, 4 = A great deal.

<sup>b</sup> 1 = Not important, 2 = Of little importance, 3 = Fairly important, 4 = Important, 5 = Very important.

<sup>c</sup> Response options: Yes, No.

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Table 2

*Agency Factors and Perceived Barriers to Business Development*

Characteristic	Agency			
	1	2	3	4
Total number of participants	15	23	6	25
Counselor attrition <sup>a</sup>	0%	13.3%	60%	31.4%
Number of BD positions	0	4 <sup>c</sup>	0 <sup>c</sup>	8
Staff perceived can't barriers <sup>b</sup>	6.2%	65.7%	0%	60.4%
Staff perceived don't know how barriers <sup>b</sup>	75%	60.0%	28.6%	57.4%
Staff perceived won't barriers <sup>b</sup>	31.3%	25.0%	10.9%	0%
Lack of time barrier <sup>b</sup>	75%	100%	85.7%	72.3%

Note. BD = business development, meaning positions that focus primarily on working with businesses

<sup>a</sup> Represents percentage of the original 90 participants who left the agency during the 18-month study period.

<sup>b</sup> Represents the percentage of all training participants (not limited to study sample) who reported the barriers. Data collected during the training.

<sup>c</sup> Agency 2 had two of their business development positions filled at the time of the training, and had all 4 filled at the end of the study. Agency 3 had plans to fill a business development position but did not have the position during the majority of the study.

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Table 3

*Descriptive Statistics for Business Development (BD) Survey Items*

Variable	Agency 1 <sup>a</sup>	Agency 2 <sup>b</sup>	Agency 3 <sup>c</sup>	Agency 4 <sup>d</sup>	All <sup>e</sup>
	<i>M (SD)</i>	<i>M (SD)</i>	<i>M (SD)</i>	<i>M (SD)</i>	<i>M (SD)</i>
Agency support					
Month 0	3.40 (0.74)	2.52 (1.08)	3.50 (0.58)	2.50 (0.69)	2.79 (0.94)
Month 18	3.40 (0.74)	2.37 (1.01)	2.75 (0.50)	2.58 (0.61)	2.74 (0.88)
Supervisor support					
Month 0	3.40 (0.74)	2.26 (0.86)	2.75 (0.96)	2.55 (0.83)	2.66 (0.92)
Month 18	3.47 (0.74)	2.00 (0.94)	2.75 (0.50)	2.58 (0.96)	2.63 (1.03)
Agency encouragement					
Month 0	3.47 (0.74)	2.78 (0.90)	3.50 (0.58)	2.60 (0.60)	2.94 (0.83)
Month 18	3.47 (0.74)	2.37 (0.90)	3.00 (0.00)	2.63 (0.60)	2.79 (0.84)
Supervisor encouragement					
Month 0	3.40 (0.83)	2.30 (1.06)	3.00 (0.82)	2.60 (0.75)	2.71 (0.98)
Month 18	3.47 (0.74)	2.32 (0.95)	3.00 (0.00)	2.42 (0.96)	2.70 (0.98)
Importance of BD activities					
Month 0	3.40 (0.63)	3.13 (0.97)	3.50 (1.00)	3.25 (0.85)	3.26 (0.85)
Month 18	3.33 (0.62)	2.37 (1.01)	3.00 (1.15)	2.79 (0.79)	2.81 (0.91)
Work time spent on BD (%)					
Month 0	19.00 (13.52)	17.70 (15.92)	17.50 (11.90)	19.25 (15.75)	18.50 (14.77)
Month 18	19.67 (13.02)	5.16 (6.27)	7.00 (6.68)	19.26 (15.59)	13.81 (13.55)

<sup>a</sup> *N* = 15 at Months 0 and 18. <sup>b</sup> *N* = 23 at Month 0; *N* = 19 at Month 18. <sup>c</sup> *N* = 4 at Months 0 and 18.

<sup>d</sup> *N* = 20 at Month 0; *N* = 19 at Month 18. <sup>e</sup> *N* = 62 at Month 0; *N* = 57 at Month 18.

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Table 4

*Average Number of Quarterly Business Development Activities and Percentage of Staff with No Activity Before and After the Training*

Activity	Agency 1 <sup>a</sup>		Agency 2 <sup>b</sup>		Agency 3 <sup>c</sup>		Agency 4 <sup>d</sup>	
	<i>M (SD)</i>	No activity (%)	<i>M (SD)</i>	No activity (%)	<i>M (SD)</i>	No activity (%)	<i>M (SD)</i>	No activity (%)
Community events								
Pre-training	3.53 (4.31)	20.0	1.09 (1.78)	60.9	1.25 (0.84)	16.7	1.49 (1.40)	24.0
Post-training	3.19 (2.96)	6.7	0.38 (0.48)	42.9	1.39 (0.95)	16.7	1.43 (1.43)	18.2
Networking events								
Pre-training	2.80 (2.96)	20.0	1.13 (1.79)	52.2	1.13 (0.63)	16.7	1.09 (1.13)	28.0
Post-training	2.86 (2.74)	6.7	0.74 (1.62)	33.3	1.28 (0.83)	16.7	1.28 (0.92)	13.6
New employer contacts								
Pre-training	1.87 (2.85)	46.7	1.30 (3.21)	65.2	2.83 (3.11)	16.7	3.29 (3.34)	16.0
Post-training	3.56 (3.61)	6.7	1.56 (3.24)	28.6	2.67 (2.80)	33.3	2.78 (2.96)	18.2
Follow-up contacts								
Pre-training	2.40 (2.90)	40.0	1.00 (1.54)	60.9	2.71 (2.68)	33.3	1.97 (2.47)	36.0
Post-training	2.20 (2.07)	13.3	0.91 (1.53)	33.3	1.83 (2.24)	33.3	1.36 (1.56)	22.7
Consumer interviews								
Pre-training	0.67 (1.23)	66.7	0.57 (0.99)	69.6	1.29 (0.80)	16.7	0.80 (0.91)	36.0
Post-training	0.98 (1.03)	6.7	0.49 (0.53)	38.1	1.56 (1.41)	16.7	0.70 (0.96)	36.4
Consumer jobs								
Pre-training	0.27 (0.59)	80.0	0.26 (0.54)	78.3	1.13 (0.86)	16.7	0.41 (0.50)	40.0
Post-training	0.33 (0.42)	33.3	0.18 (0.25)	47.6	1.06 (1.69)	50.0	0.27 (0.77)	77.3

<sup>a</sup> Pre- and post-training *N* = 15. <sup>b</sup> Pre-training *N* = 23; Post-training *N* = 21. <sup>c</sup> Pre- and post-training *N* = 6.

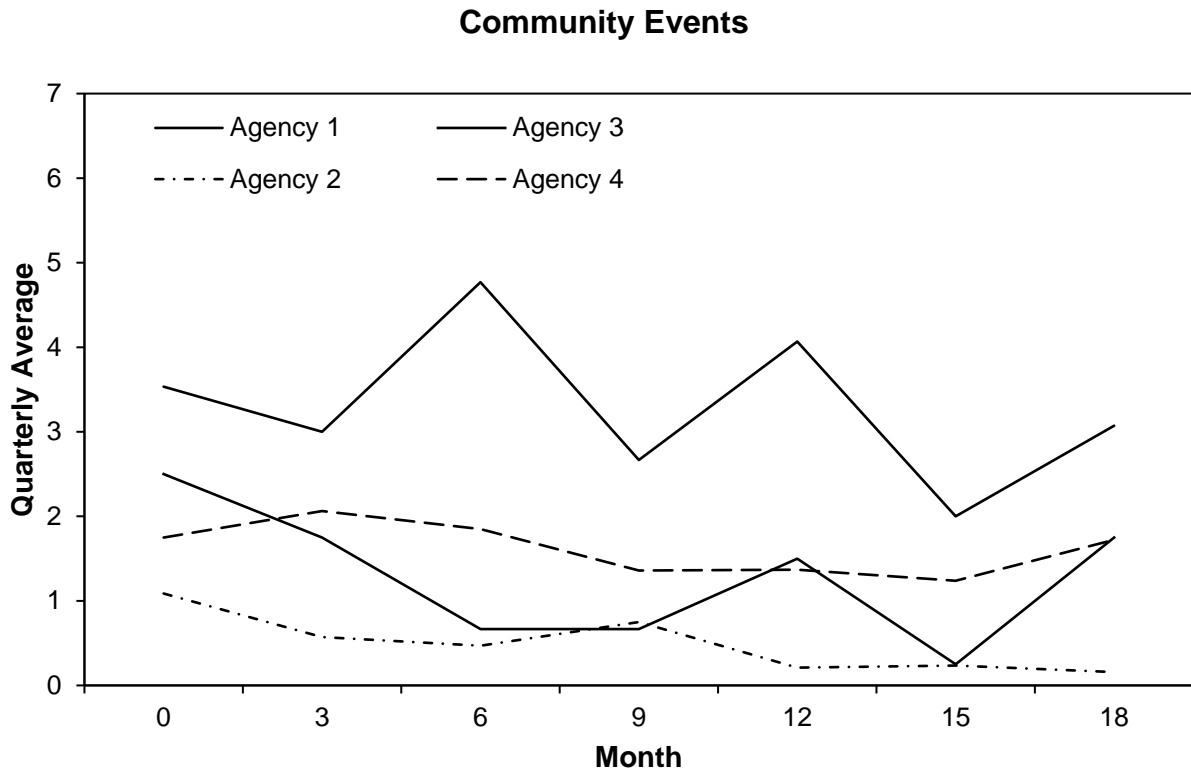
<sup>d</sup> Pre-training *N* = 25; Post-training *N* = 22.



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**Figure 1**

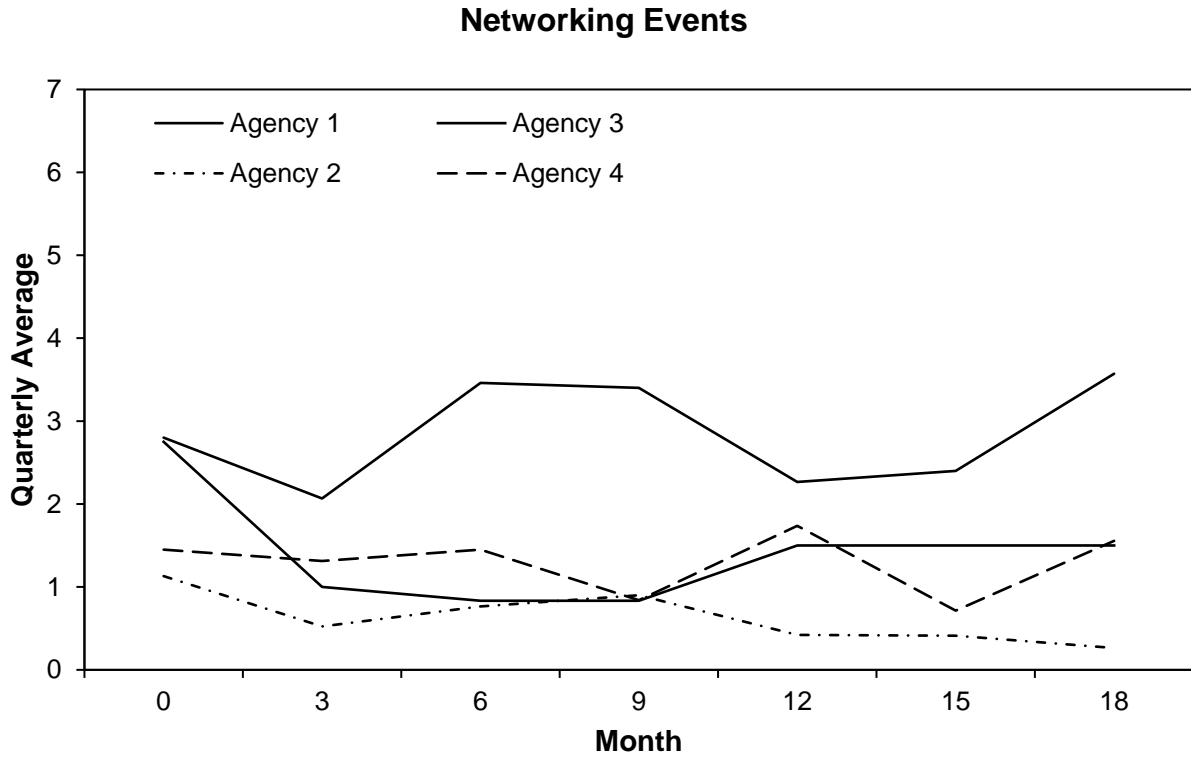
*Average Number of Community Events Attended by Participants Per Quarter by Agency*



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**Figure 2**

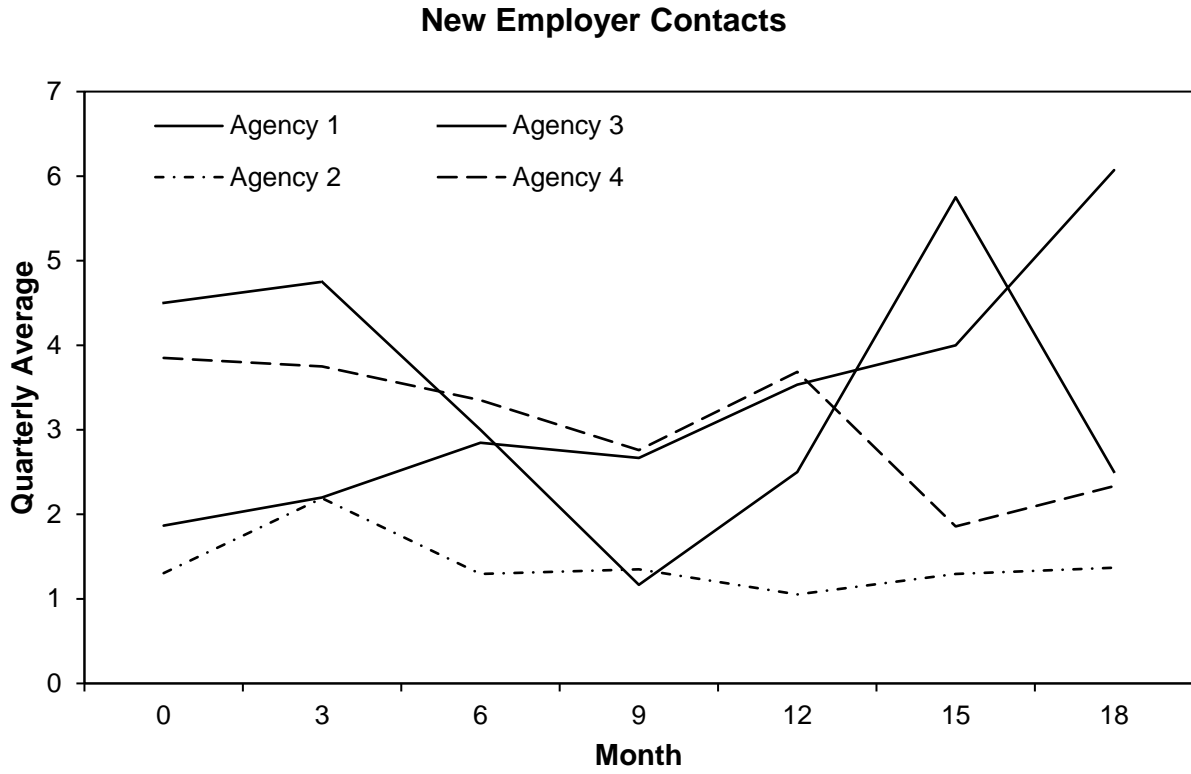
*Average Number of Networking Events Attended by Participants Per Quarter by Agency*



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**Figure 3**

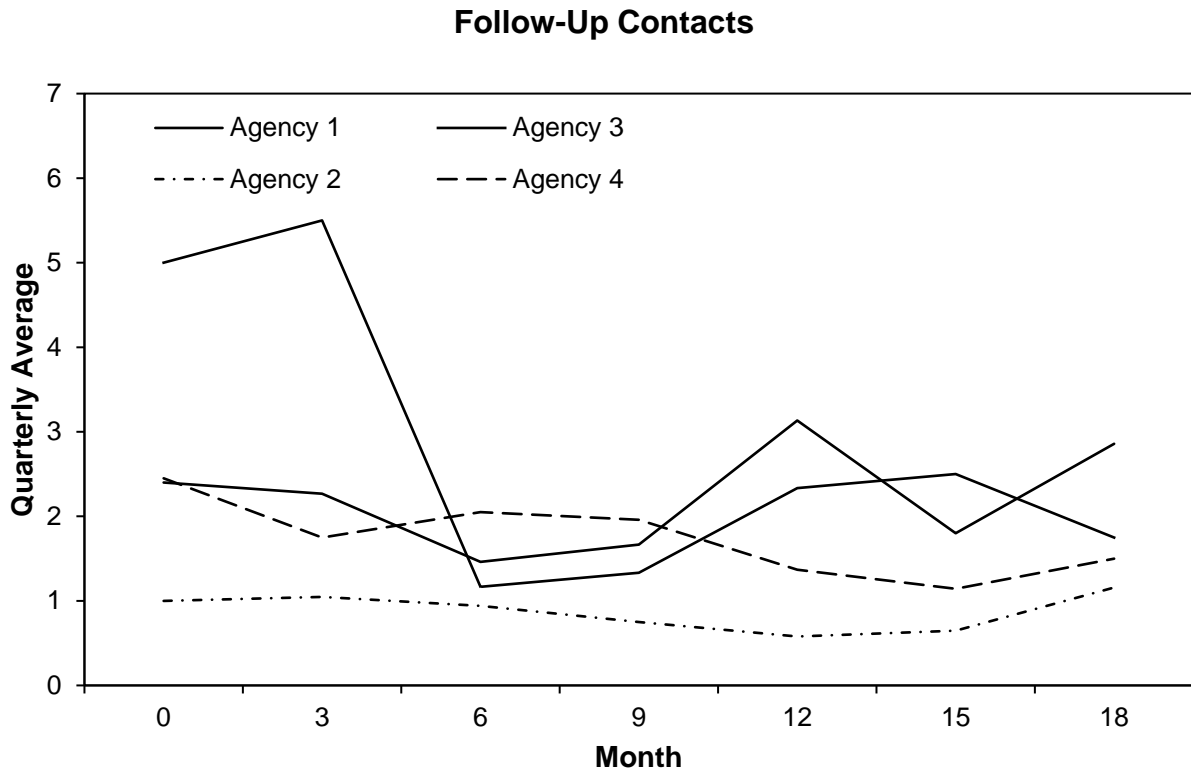
*Participants' Average Number of New Employer Contacts Per Quarter by Agency*



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**Figure 4**

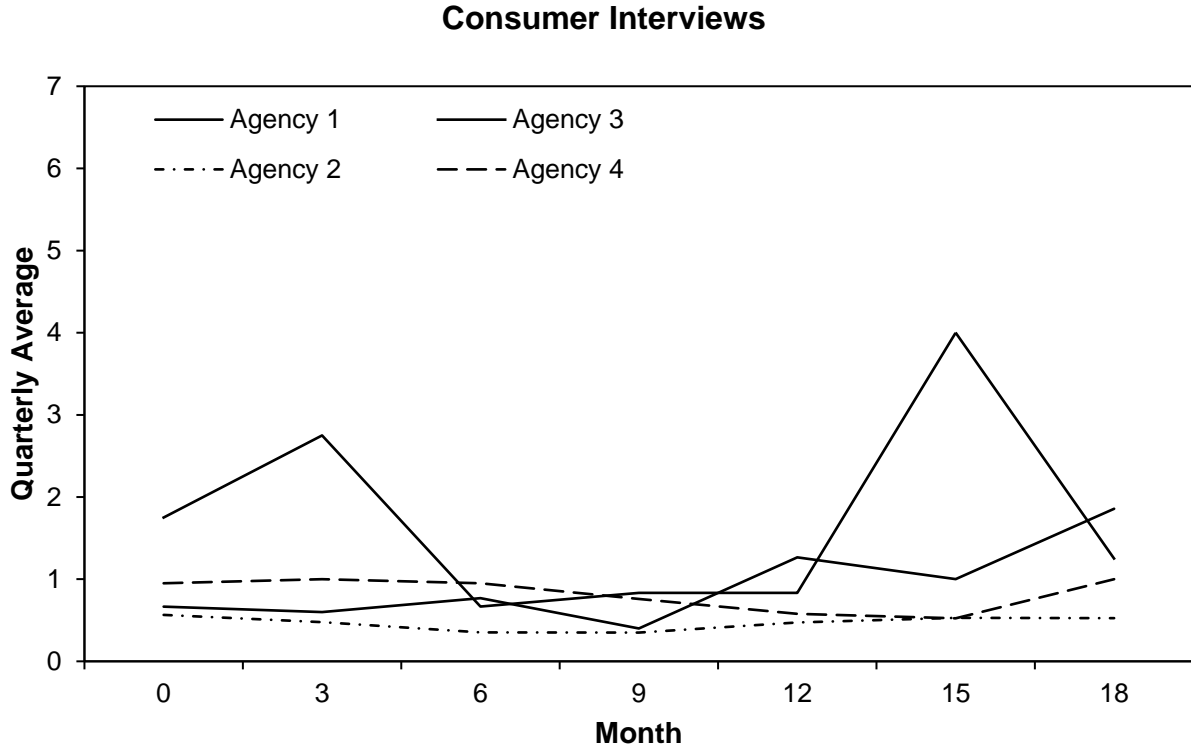
*Participants' Average Number of Follow-Up Contacts with Employers Per Quarter by Agency*



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**Figure 5**

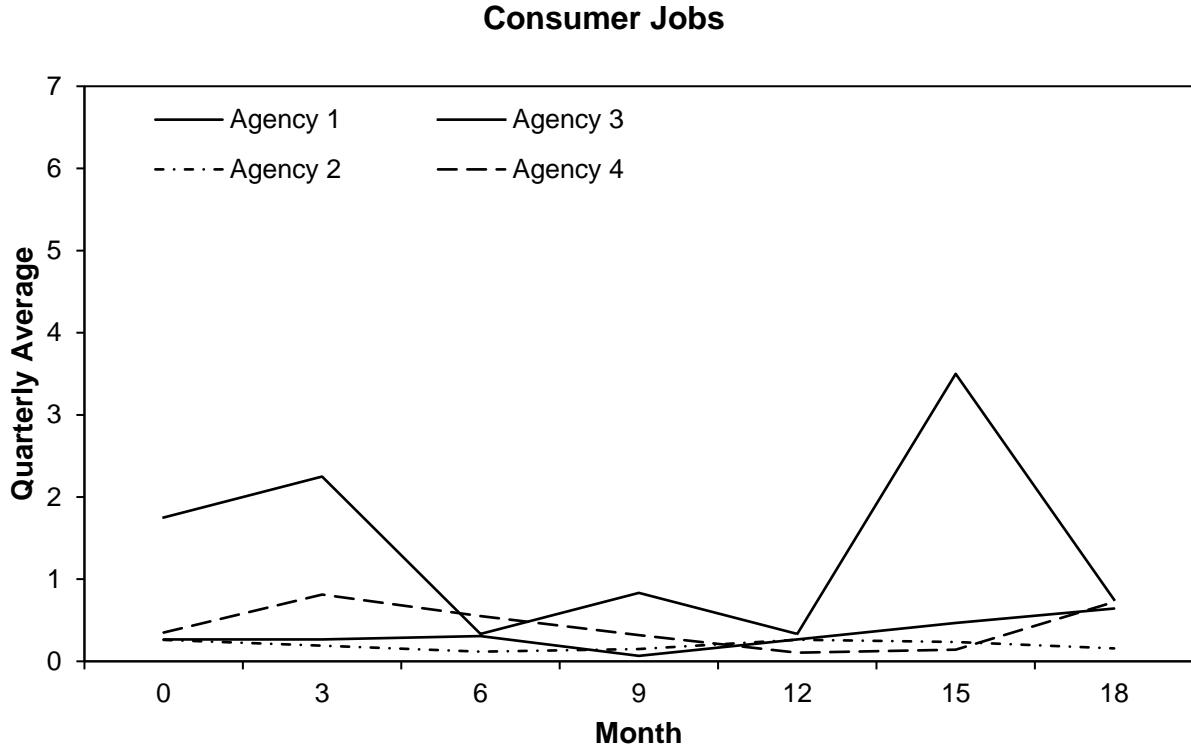
*Average Number of Consumers Receiving Interviews from Participants' Business Contacts Per Quarter by Agency*



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**Figure 6**

*Average Number of Consumers Receiving Jobs from Participants' Business Contacts Per Quarter by Agency*



## **Appendix A: Structured Interview Protocols**

### **Administrators**

1. What actions did you, or the agency as a whole, take as a result of participating in the Improving Business Development Skills training that could lead to better relationships with business?
  - a. If an action is provided, probe to learn why this action was taken, who was involved, what happened as the action was being taken, and what happened as a result.
2. Were you able to (or are you planning to) implement any of the suggestions in the Technical Assistance Report?
3. What factors facilitated taking actions that would lead to better agency relationships with business?
4. What factors inhibited taking actions that would lead to better agency relationships with business?
5. What are the opportunities for furthering these actions?
6. Did you notice changes in the behavior of any of the counselors related to business development activities after their participation in the training?
  - a. If yes, what did they do that was different?
7. Are there any counselors who you believe have increased their business engagement activities after the training or particularly benefited from the training?

### **Counselors**

1. How involved were you with business development activities prior to the training?
2. What impact has the training had on your work activities?
3. What changes did you make as a result of participating in the training that could lead to improved or increased business development activities?
  - a. Probe to learn why this change was made, what happened as a result of the change.
4. How have you been able to apply what you learned during the training?
5. Have you made any new employer contacts since the training?
  - a. If yes, do you think training helped you do that?
6. Have you experienced any challenges to increasing business development activities?
  - a. Probe to understand any challenges experienced
7. Has anything changed agency-wide since the training? Did the agency make any changes to help you with business development activities?
8. Have you used any of the tools/materials we provided during the training?
  - a. Probe to learn which materials/how being used
  - b. Ask about use of LMI information (on state website)
9. What part of the training was the most useful to you personally?
10. Was there any part of the training that you would have liked to learn more about/have spent more time on?
11. Do you have any suggestions for updating the training?