

**PLAINTIFFS'
EXHIBIT**

PPI 1365

IN THE UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF TEXAS
SAN ANTONIO DIVISION

ERIC STEWARD, by his next friend
and mother, Lillian Minor, *et al.*,

Plaintiffs,

v.

CHARLES SMITH, in his official capacity as
the Executive Commissioner of Texas' Health
and Human Services Commission, *et al.*,

Defendants.

Case No. SA-5:10-CV-1025-OG

THE UNITED STATES OF AMERICA,

Plaintiff-Intervenor,

v.

THE STATE OF TEXAS,

Defendant.


DECLARATION AND EXPERT DISCLOSURE OF
DR. E. SALLY ROGERS

I declare under the pains and penalties of perjury under the laws of the United States and in compliance with Fed. R. Civ. P. 26(a)(2)(B), that the foregoing is true and correct and that I am submitting this disclosure regarding my work as an expert consultant in the above case.

1. My report, which is attached, contains a complete statement of all of my opinions as well as an explanation of the basis and reasons for those opinions.

2. My report describes the facts, data and other information I considered in forming my opinions.
3. There are no exhibits prepared at this time to be used as a summary of or support for my opinions.
4. My attached curriculum vitae states my qualifications and lists all publications I have authored within the past ten years.
5. Within the last four (4) years, I have not testified as an expert except in this case in conjunction with Plaintiffs' Motion for Preliminary Injunction.
6. I have been retained by the Plaintiffs and the United States as a joint expert in the *Steward v. Smith* litigation. My compensation in this litigation is \$150.00 per hour for my review, preparation of reports and statements, and for deposition or testimony, plus expenses. My compensation is not dependent on the outcome of this litigation.

Signed and dated:



Dr. E. Sally Rogers

3/23/18

**UNITED STATES DISTRICT COURT
WESTERN DISTRICT OF TEXAS
SAN ANTONIO DIVISION**

Eric Steward, by his next friend and
Mother, Lillian Minor, et al.
Plaintiffs,

v.

Charles Smith, et. al.
Defendants.

Case No. SA-5:10-CV-1025-OG

The United States of America
Plaintiff-Intervenor,

v.

The State of Texas
Defendant.

REPORT OF DR. E. SALLY ROGERS

I. Purpose

I was asked by counsel for Plaintiffs and the United States Department of Justice (hereinafter, “plaintiffs’ counsel”) to develop a set of procedures and a methodology for drawing a random and representative sample of Medicaid-eligible individuals age 22 and older with ID/DD residing in nursing facilities in Texas for an expert review of their service and treatment needs.

In developing these research procedures and methods, I worked with the plaintiffs’ counsel to understand and define the population and thus to ensure the accuracy of the sampling frames needed to randomly select participants for an expert review. I was also asked to develop procedures for contacting individuals to participate in the review, to ensure accurate tracking of both participants and non-participants in the review, and to calculate the representativeness of the

sample. These procedures and methods were designed to ensure a random, unbiased and representative sample that could be used to confidently generalize the findings of the reviews to the larger population of interest.

II. Background/Qualifications

As noted in my Curriculum Vitae (attached hereto as Attachment A), I am the Executive Director at the Center for Psychiatric Rehabilitation at Boston University (the Center), where I have been employed as a researcher for approximately 37 years. I was the Director of Research from 1987 until 2017 and have been the Executive Director since 2016. I am also Research Professor at Sargent College of Health and Rehabilitation Sciences at Boston University.

For the past 37 years, I have been engaged in the design and implementation of various research and evaluation projects developed to learn more about care and outcomes of individuals with psychiatric and other disabilities using a variety of research strategies. I use differing methodologies including clinical research, survey research, needs' assessment, measurement design and development, program evaluation, and exploratory research. In addition to my work at the Center, I have taught research methods at Sargent College and to post-doctoral fellows that are in residence at the Center. I consult extensively on disability-related research projects. Much of my career at the Center and my consultation outside of the Center has focused on assessing the clinical and service needs and outcomes of individuals with psychiatric and other disabilities, as well as evaluations of whether various clinical, employment and quality of life needs are being met.

The Center for Psychiatric Rehabilitation is primarily a federally-funded research, training and services organization. In addition to federal research grants, we receive funding from private foundations and state governments to assist with the conduct of program evaluation and research. As an example, I recently completed an evaluation of a new service for difficult-to-serve individuals that was funded by the State of Massachusetts Attorney General's office after a class action lawsuit. Over the past several years I have been a consultant to the State of Florida's Department of Children and Families and to the United States Department of Justice to assist with clinical reviews of members in class action lawsuits in Florida, Massachusetts, Oregon and New Hampshire. In these capacities, I have conducted both client service reviews

and overseen the sampling process for reviews for state agencies that were defendants in systemic lawsuits or for plaintiffs. My research and reports have been accepted as reliable and useful by federal courts in conjunction with these cases. I also conducted expert work in this case for Plaintiffs' original client review.

III. Materials Reviewed

I reviewed an Excel spreadsheet that contained a comprehensive list of Medicaid-eligible individuals age 22 and older with ID/DD residing in nursing facilities in Texas subtracting out individuals living more than 80 miles from 8 major metropolitan areas. I understood that this Excel spreadsheet included 71% of all individuals age 22 and older with ID/DD residing in nursing facilities in the state of Texas. The individuals contained in this Excel spreadsheet formed the basis for my sampling. I also received the Statewide Findings of the Reviewers which summarized the client review findings in the aggregate.

A complete list of documents I reviewed is attached to my report as Attachment B.

IV. Methodology

I provided consultation to plaintiffs' counsel for the review which involved several steps. First, I consulted with plaintiffs' counsel to understand the purpose of the review, to understand the universe or population to whom they wished to generalize findings, to determine the sampling frame, to ensure that any lists or databases used for sampling were as accurate and comprehensive as possible, and to discuss procedures for arriving at a scientifically sound sampling methodology. My consultation and related calls were undertaken to insure that a random and representative sample was developed for the review.

Procedures for drawing a sample for the participant review were planned as follows: 1) I would receive an electronic copy of the Medicaid-eligible individuals age 22 and older with ID/DD residing in nursing facilities in the state of Texas in the form of an Excel spreadsheet; 2) because of geographic and resource constraints, this list would exclude individuals in nursing facilities that were more than 80 miles from 8 of the major metropolitan areas/cities; 3) the electronic database of individuals would be an accurate and comprehensive list of class members with ID/DD residing in nursing facilities in these geographic areas with one unique entry/row per

person; 4) using the Excel random sort function, I would scramble the list prior to sampling so that it was in random order and to prevent any systematic biases that could arise from how the list was compiled; 5) I would use a random seed to begin the random selection process; 6) I would select a designated number of individuals randomly from the list using random selection software, including oversampling by a certain percentage; 7) I would identify the randomly selected individuals on this electronic spreadsheet and return it for use in the review. These steps were designed to provide an objective random list for the review and one in which steps were taken to insure randomness and representativeness, given the constraints faced.

The list of individuals to form the sampling frame came in an excel spreadsheet which contained $n=2,474$ unique individuals. This list had been constructed by consultants to the plaintiffs' counsel and had extracted individuals who lived outside of an 80-mile radius of 8 major metropolitan areas. In consultation with plaintiffs' counsel, I decided on the following sampling parameters: 90% confidence interval; 10% margin of error. Researchers and evaluators must strike a balance in designing reviews such as these so that methodological rigor is maintained, the results yield clinically meaningful information, and the feasibility of completing the research is high. All three of these issues were considered when developing the survey parameters. We chose the 90% confidence interval and 10% margin of error to produce meaningful reviews of the quality of care of the population, while taking into consideration existing time and human resource constraints. We discussed the need to oversample because of concerns about the ability to contact individuals in the sample, the possibility that some individuals might not voluntarily agree to participate in the review, or for other reasons might not be available for the review. The target for the review to satisfy the 90% confidence level/10% margin of error was determined to be $n=69$. Oversampling, we decided to extract a sample of $n=200$.

I then used a random seed, obtained from www.random.org, to begin the random selection process. When I received that list from the plaintiffs' counsel, I randomly sorted the list using an Excel random sort function and the random seed provided by random.org. This prevents any bias that could be introduced in the construction of the list (for example, recent service recipients added to the list last). I then used Raosoft software to calculate the needed sample size to satisfy the parameters needed (available online at www.raosoft.com). Then I used

another software program (www.randomizer.org) to perform the actual selection of individuals in the database. This software works by first providing the size of the sampling frame, the desired confidence level and margin of error. It then identifies a row in a list as one that should be randomly selected. I used that information to highlight the unit (i.e. person) as being part of the random sample. Together, these procedures ensured that a random sample was selected for the review.

I gave plaintiffs' counsel a list of randomly selected individuals from the sampling frame for the review, and instructed plaintiffs' counsel to use the list as designated to ensure that randomness was preserved and that the sample would be representative of the larger sampling frame. I understand that plaintiffs' counsel sent letters to all n=200 individuals on the list, and, where relevant, their legally authorized representatives ("LARs"), as a first step in securing consent to participate in the review. Letters were followed by phone calls to LARs for those individuals who had an LAR, and an attempt to directly contact individuals in person at nursing facilities for those individuals without LARs. I instructed plaintiffs' counsel to proceed down the list of randomly selected individuals until they fulfilled the number needed for the review. I further instructed plaintiffs' counsel to proceed down the list in the order that individuals were randomly selected to locate them for the review and to obtain permission to be reviewed. I also instructed them to take careful notes about those individuals who were not locatable or who refused to participate, who were deceased or in some way unable to participate in the review. This information would be used for later aggregation and examination of "non-responders" and other individuals who were selected but did not participate in the review. Lastly, I advised plaintiffs' counsel that when they satisfied the number required to perform their review using the above parameters, they should cease attempts to gather further authorizations to participate.

As a result of these efforts to secure consent, n=73 individuals agreed to participate in the review.¹ In order to meet the 90% confidence level and 10% margin of error parameters, a total of n=69 Medicaid-eligible individuals age 22 and older with ID/DD residing in nursing facilities were to be reviewed. Of the 73 who consented: 1 was already deceased, 1 decided not to

¹ This occurred because plaintiffs' counsel received a number of consents by mail, so they received a few consents even after they had reached the target number and stopped their efforts to obtain consents.

participate after previously consenting, 1 consent was received too late to plan a review, and 1 was determined to be ineligible. Ultimately, reviews were planned for 69 people.

A number of these individuals resided in Houston and other affected coastal areas during Hurricane Harvey. An attempt was made to review some of these individuals, but the intervening events including the safety and logistical challenges brought about by Hurricane Harvey made on-site reviews extremely difficult, if not impossible. Eight individuals were ultimately unable to be reviewed within an adequate time period. Similarly, reviews of two individuals in the San Antonio area were unable to be completed because the reviewer's home was affected by Hurricane Irene. Plaintiffs' counsel contacted me to discuss the methodological ramifications of being unable to complete these planned reviews. In addition, one planned review could not be completed because individual passed away before her review could occur, two other individuals were determined to be ineligible, and a final review could not be completed because of access issues at the nursing facility, where the facility denied access to the reviewer.

A total of n=55 individuals ultimately participated in the review. One of the 55 individuals was determined to be PASRR ineligible after the review was conducted. With n=54 completed reviews, the margin of error was calculated at 11.07%; the confidence level remained set at 90%.

V. Methodological Challenges

There are certain expected and predictable challenges to designing a research methodology for individuals with disabilities that must be taken into consideration and addressed, to the extent possible, in a case such as this. Such challenges often arise because of the situations and disabilities of the individuals involved, limitations on access to current information (such as moves, deaths) needed to create the sampling frame, as well as the inevitable challenges that come with accurately identifying sampling frames.

First, conducting reviews or surveys benefit from accurate identification of the sampling frames or the universe of programs and individuals served prior to drawing a random sample. Random selection of samples should begin with as accurate a list as possible of identified programs or participants— a list that purports to be current, comprehensive and non-duplicative, and that contains only members of the class with the elements and characteristics identified for

selection in the review. These requirements are important for ensuring a representative and random sample.

Second, there is a need to ensure voluntary participation in reviews that involve human subjects and particularly when vulnerable populations (such as the individuals in this class) are involved. This requires that the randomly sampled individuals be able and willing to provide consent and participate in the review. For individuals with ID/DD, particularly those who are institutionalized in nursing facilities, securing informed consent can be especially challenging. For example, some class members are non-verbal or have communication challenges that make obtaining consent more difficult.

Third, all research and evaluations are constrained by available human and financial resources. Studies done by public agencies are often undertaken with very limited funds and are required to make adjustments based upon available funding, deadlines, and other resource constraints and realities. These challenges are common and somewhat predictable. In this review, not only were there the typical resource limitations, but also two catastrophic natural events (Hurricanes Harvey and Irene) interfered with the ability to complete the review as planned. Despite all of these issues, researchers develop strategies to address these challenges, and to draw samples and conduct studies that are considered reliable and useful. This is equally true of this review.

There were insufficient resources to review the entire universe of PASRR eligible nursing facility residents in the class. This would have required significant resources, hundreds of thousands of dollars, and probably months of time given the geographical dispersion of nursing facilities throughout Texas. Reviewing everyone in a sampling frame is deemed by researchers to be unnecessary as long as a random, representative sample can be drawn that is free from systematic biases. Such an approach was used in this review. The review was limited to individuals with ID/DD who were in nursing facilities within an 80-mile radius of 8 metropolitan centers to conserve resources. There were challenges in locating individuals at different stages of the review process because of Hurricane Harvey, and because some individuals were deceased, had moved, refused to participate, or simply did not respond to extensive outreach efforts. Despite the challenges due to Hurricane Harvey, meaningful survey parameters (i.e., 90% confidence level and an 11.07% margin of error) were maintained.

Because it is not possible to review individuals without their consent, it is not technically possible to ensure that the final review is representative of non-participants who refused to release confidential information or to cooperate in the review process. This is true in all evaluations that involve human subjects or programs and services provided to human subjects, particularly when access to confidential medical information is needed. As in all such evaluations, randomly selected individuals who do not participate in the review are often considered to be “non-participants at random” and, therefore, it is expected that they do not compromise representativeness. For example, it may be assumed that the individuals who were deceased or moved were not meaningfully or significantly different from those who were reviewed. This helps ensure that no additional “selection biases” are introduced in the review other than those of refusal.

Oversampling is commonly used in studies involving human subjects. It is necessary when there are concerns about being able to locate individuals, when individuals may not be eligible for the study, or when there are concerns about non-participation. Oversampling is done so that there are sufficient numbers of randomly sampled entities to satisfy the target number for the survey or the review.

With a sample that is free from bias and with the confidence level and margin of error used, it is possible to be confident that the results of the review are representative of the targeted sampling frame. I am confident that the sampling methodology and procedures used in this review allow the findings to be generalizable to the Medicaid-eligible residents of nursing facilities age 22 and older with ID/DD in the state of Texas. While the sample did exclude individuals outside of a geographic radius because of resource constraints, there is no reason to suggest that these individuals with ID/DD are significantly different in any way related to the review that the findings would not generalize to them. In addition, the sample that formed the basis of the random selection represented 71% of all individuals age 22 and older with ID/DD residing in nursing facilities in the state of Texas. Furthermore, the Statewide Findings of the Reviewers demonstrate a coherence and consistency of findings, lending greater credibility to the validity of those findings and to the overall review.

VI. Conclusion

I provided research consultation and guidance for the review of individuals with ID/DD residing in nursing facilities in Texas. I worked carefully and closely with the plaintiffs' counsel to take the necessary steps to insure a systematic and unbiased approach to identifying persons for the review. Target parameters for these samples were set at the highest levels possible given geographic and other resource constraints for the review. In addition, I provided guidance in the use of the list of randomly selected individuals to insure that biases were not introduced in the conduct of the reviews. Despite limitations in resources and the challenges, such as those presented by Hurricanes Harvey and Irene, I am confident that the reviews were conducted with unbiased samples to the extent possible and that they are representative of Medicaid-eligible individuals age 22 and older with ID/DD residing in nursing facilities in Texas.

Attachment A

Curriculum Vitae
E. Sally Rogers

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CURRICULUM VITAE

Name: ERNA SALLY ROGERS

Education:

<u>Degree</u>	<u>Year Granted</u>	<u>Institution</u>	<u>Major</u>
Sc.D.	1980	Boston University	Rehabilitation Counseling
M.A.	1975	Seton Hall University	Rehabilitation Counseling
B.A.	1970	Temple University	Psychology

Professional Experience:

- 8/16 – present Executive Director, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston, MA. Responsible for ensuring that the mission of the Center is carried forward; oversight and management of responsible the strategic, operational, and financial viability of all divisions of the Center, including service delivery, research, training and knowledge translation.
- 9/87 - present Director of Research, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston, MA. Responsible for development of new research projects and management of existing research projects for the Center, including oversight of research design, data collection, data analysis, and writing of progress reports and journal articles to disseminate findings.

Grant Funding/Investigator Roles:

- 2017-present Co-Principal Investigator: Developing a Measure of Career Advancement for Individuals with Psychiatric Disabilities. This grant, awarded by the National Institute on Disability and Rehabilitation Research is designed to develop a measure of career development for individuals with psychiatric disabilities. My role on this grant is to oversee all aspects of the scientific activities of the study including the development of the assessment, surveys to collect data, and analyses to test the measure's validity and reliability using classical test and item response theories. This grant is for 3 years and totals \$600,000.
- 9/09 – present Co-Principal Investigator of two consecutive Research and Training Center grants (with Dr. Marianne Farkas) from the National Institute on

Attachment A

Disability and Rehabilitation Research to improved employment outcomes for individuals with mental illness. As Co-Investigator and Director of Research, I oversee the implementation and completion of 5 research studies, including randomized clinical trials, planning of the study design and procedures, data collection, data monitoring, entry, analysis and interpretation. The goal is to improve work outcomes for persons with psychiatric disability. The grant totals \$4.25 million dollars over 5 years.

9/07-8/12; 9/13-present Co-Principal Investigator, Advanced Research Training Grant (with Dr. Zlatka Russinova), Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston University, Boston, MA. This grant from the National Institute on Disability and Rehabilitation Research for advanced training in rehabilitation research is designed to recruit 6 fellows and train them to conduct research in psychiatric rehabilitation.

10/14-9/19 Co-Principal Investigator, Disability Rehabilitation Research Project (Dr. Zlatka Russinova, PI). This grant, awarded by the National Institute on Disability and Rehabilitation Research is designed to improve the community life of individuals with severe mental illness. We will conduct several research projects to better understand the meaning of community participation and integration, to adapt an established photovoice intervention to promote community integration, to develop and validate a measure of community integration, and to test the effectiveness of this intervention (called Bridging Community Gaps) in a large randomized trial. My role on this grant is to direct two of the research projects and to assist the Principal Investigator in overseeing all aspects of the research and dissemination activities. This grant is for 5 years and totals \$2.25 million.

09/12 – 09/14 Principal Investigator, Health and Disability Research Institute at the Boston University School of Public Health, sub-award to develop and test assessments for the National Institute of Health/Social Security Administration study of work function for individuals with serious mental illness. \$253,000.

11/06-10/10 Co-Principal Investigator, Field Initiated Research Project (with Dr. Zlatka Russinova). This grant, awarded by the National Institute on Disability and Rehabilitation Research is designed to culturally adapt a scale recently developed by the Center (Recovery Promoting Competence Scale) to be relevant to four Spanish speaking populations. My role on this grant is to oversee all aspects of the scientific activities of the study including the cultural adaptation of the scale, the psychometric testing, and the item response theory testing. This grant is for 3 years and totals \$450,000.

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- 11/05- 10/11 Co-Principal Investigator, of a Knowledge Dissemination and Utilization grant (with Dr. Marianne Farkas). This grant is funded by the National Institute on Disability and Rehabilitation Research. My role on this grant is to work collaboratively with professional and consumer organizations and stakeholders to develop, test, and apply a process of research standards to rate the quality of disability research that in turn will allow end-users in the rehabilitation field to make informed choices based on the perceived rigor and use of the research available, and in so doing promote utilization of rehabilitation research. The grant is for 5 years and totals \$2.5 million dollars.
- 05/05 – 09/05 Principal Investigator, Department of Mental Health Grant to study satisfaction surveys and methodologies to assist the state to develop an ongoing, annual assessment of consumers and other stakeholders, examine existing instruments and practices in other states, test instruments, and provide recommendations about assessments of service quality \$45,000.
- 11/04- 9/10 Co-Principal Investigator, Research and Training Center grant (with Dr. Marianne Farkas) from the National Institute on Disability and Rehabilitation Research to study recovery of individuals with mental illness. As Co-Investigator and Director of Research, I oversaw the implementation and completion of 5 research studies, including 4 randomized clinical trials, planning of the study design and procedures, data collection, data monitoring, entry, analysis and interpretation. The goal was to advance knowledge about the recovery of persons with psychiatric disability. The grant totaled \$3.75 million dollars over 5 years.
- 04/04 – 05/05 Principal Investigator, Tower Foundation award to assist Windhorse Associates, a residential program for individuals with psychiatric disabilities, to develop and implement a program evaluation system. \$50,000.
- 9/98-05/03 Principal Investigator, a multi-site study of consumer operated services funded by the Substance Abuse and Mental Health Services Administration (SAMHSA). This multi-site grant was designed to study the effects of consumer-operated services in Missouri and other locations throughout the country. As PI, I was responsible for all research activities in this randomized clinical trial including the development and implementation of study procedures, the conduct of the trial, the data monitoring, entry and analysis. This study was conducted in Missouri and required the establishment of a research office with numerous research staff in St. Louis and frequent meetings with federal project officers and multi-site collaborators in Washington DC. This 4-year grant totaled approximately \$2.3 million dollars.

Attachment A

- 9/97 – 12/98 Co-Investigator, SAMHSA, a study of two housing approaches, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston University, Boston, MA. This Center for Mental Health Services grant was designed to study supported housing for persons with mental illness in Mobile, Alabama. My role was to study the effectiveness of various housing approaches for individuals with mental illness using a mixed methods approach of both quantitative and qualitative research strategies.
- 1/97 – 10/04 Co-Principal Investigator, Research and Training Center (with Dr. Marianne Farkas). This grant from the National Institute on Disability and Rehabilitation Research had multiple research and training projects designed to advance knowledge about the recovery of persons with psychiatric disability. I was responsible in my role as Co-Principal Investigator for the development and implementation of 9 research projects with varying research methodologies, including survey research, policy research, quasi-experimental trials, instrument development, and qualitative research. This was a five-year grant totaling \$3.75 million dollars.
- 11/94 – 12/96 Co-Director, Research and Training Center, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston University, Boston, MA. With other Co-Director, responsible for the programmatic implementation and fiscal oversight of the Center's five-year research, training, and dissemination grant designed to improve the rehabilitation outcomes of persons with severe psychiatric disability.
- 3/92 – 1/03 Principal Investigator, Advanced Research Training Grant, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston University, Boston, MA. This grant from the National Institute on Disability and Rehabilitation Research for advanced training in rehabilitation research is designed to recruit 6 fellows with clinical doctorates and train them to conduct research in psychiatric rehabilitation. This grant was awarded twice, with funding grant totaling \$1.4 million dollars.
- 3/81 - 8/87 Director of Data Management and Research Associate, Center for Psychiatric Rehabilitation, Sargent College of Health and Rehabilitation Sciences, Boston University, Boston, MA. Responsible for directing data analysis and information management; supervising data entry, conducting statistical analysis; review, preparation, management, and implementation of research proposals.
- 6/78 - 3/85 Psychologist, Mount Pleasant Hospital, Lynn, MA. Responsible for providing, on a consultant basis, a comprehensive psychological evaluation to patients in an inpatient treatment facility for alcoholics.

Evaluation consisted of administering a battery of tests for neuropsychological screening and intellectual and personality functioning-writing a psychological report including recommendations for the patient's treatment program. Also responsible for inpatient psychotherapy and supervision of Employee Assistance Program.

Faculty Appointments:

- | | |
|----------------|---|
| 1981 - 1992 | <u>Research Assistant Professor</u> , College of Health and Rehabilitation Sciences: Sargent College, Boston University |
| 1993 - 2014 | <u>Research Associate Professor</u> , College of Health and Rehabilitation Sciences: Sargent, Boston University |
| 2014 - present | <u>Research Professor</u> , College of Health and Rehabilitation Sciences: Sargent, Boston University |

Teaching Responsibilities:

- | | |
|-----------------|--|
| 2005-present | Invited Lecturer, Sargent College |
| 2004-2005 | Post-Doctoral Seminar in Research Methods |
| 1994-1998; 2003 | RC708 Rehabilitation Research I - Introductory research course for masters and doctoral students. Course covered basics of scientific inquiry, research design, and interpretation of research results. |
| 1992/1995/2000 | RC805 Research Seminar - Research seminar for doctoral students, designed to prepare them for their doctoral thesis. Course covered design and development of research studies, reliability and validity of instruments, use of statistical tests. |
| 1979 | RC611 - Role of the Family in Rehabilitation. Team taught this course which is designed to provide rehabilitation practitioners with the knowledge and skills needed to effectively utilize the family in the rehabilitation process. |

Professional Certifications:

Licensed Psychologist, Commonwealth of Massachusetts, #3053

Health Service Provider, Commonwealth of Massachusetts, 1993

Publications -- Peer Reviewed Articles:

- Maru, M., Rogers, E.S., Hutchinson, D., & Shappell, H. (2018). An integrated supported employment and education model: Exploratory study of an innovative approach designed to better meet the needs of young adults with psychiatric conditions. *Journal of Behavioral Health Services & Research*, 2018. 1–9. DOI10.1007/s11414-018-9595-x.
- Teixeira, C., Mueser, T., Rogers, E. S., McGurk, S. (In Press). Job Endings and Work Trajectories in Persons Receiving Supported Employment and Cognitive Remediation. *Psychiatric Services*.
- Balogun-Mwangi, O., Rogers, E. S., Maru, M., Magee, C. (2017). Vocational Peer Support: Results of a qualitative study. *Journal of Behavioral Health Services and Research*. <https://doi.org/10.1007/s11414-017-9583-6>
- Rogers, E. S. (2017) Peer support services: state of the workforce-state of the field in the USA. *Mental Health and Social Inclusion*, 21(3), 168-175, <https://doi.org/10.1108/MHSI-03-2017-0015>.
- Rogers, E. S. & Swarbrick, P. (2016). Peer Delivered Services: Current Trends and Innovations. Editorial in *Psychiatric Rehabilitation Journal*, 39(1), 193-196.
- Rogers, E. S., Maru, M., Johnson, G., Cohee, J., Hinkel, J., & Hashemi, L. (2016). A randomized trial of individual peer support for adults with psychiatric disabilities undergoing civil commitment. *Psychiatric Rehabilitation Journal*, 39(3), 248-255.
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- Teixeira, C., Santos, E., Abreu, M.V., & Rogers, E.S. (2015). Current status of psychiatric rehabilitation in Portugal: A national survey. *Psychiatric Rehabilitation Journal*, 38, 263-7. Epub doi: 10.1037/prj0000144.
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- Fang-Hang Chang, F. Helfrich, C., Coster, W., & Rogers, E. S. (2015). Factors associated with community participation among individuals who have experienced homelessness, *International Journal of Environmental Research in Public Health*, 12(9), 11364-11378; doi:10.3390/ijerph120911364).

- Marfeo, E., Eisen, S., Ni, P., Rasch, E., Rogers E.S., & Jette A. (2015). Do claimants over-report behavioral health dysfunction when filing for work disability benefits? *Work*, 51(2):187-94. PMID: 24594538.
- Rogers, E. S., Russinova, Z., Maru, M., Restrepo-Toro, M., Cook, K. F., Rogers, J. D. (2015). Assessing Recovery-Promoting competencies of providers serving Latinos with serious mental illnesses. *Journal of Latino Psychology*, 3(4), 239-257.
- Gidugu, V. Rogers, E. S., Harrington, S., Maru, M., Johnson, G., Cohee, J., Hinkel, J. (2015). Individual Peer Support: A Qualitative Study of Mechanisms of its Effectiveness, *Community Mental Health Journal*, 51, 445-452.
- Chan, D., Helfrich, C., Hursh, N, Gopal, S., & Rogers, E. (2014). Measuring community integration using Geographic Information Systems (GIS) and participatory mapping for people who were once homeless. *Health & Place*, 27, 92-101.
- Russinova, Z., Rogers, E.S., Gagne, C., Bloch, P., Drake, K., & Mueser, K. (2014). A randomized controlled trial of a peer-run anti-stigma photovoice intervention. *Psychiatric Services*, 65(2), 242-246.
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Books, Book Chapters and other publications:

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Guest Editorships/Other Publications:

- Rogers, E. S. & Swarbrick, P. (2016). Guest Co-Editors. Special issue on Peer Services. *Psychiatric Rehabilitation Journal*.
- Johnston, M. Vanderheiden, G., Farkas, M, Rogers, E. S., Summers, J., & Westbrook, J. (2009). The Challenge of evidence in disability and rehabilitation research and practice: A position paper. Austin, TX: National Center for the Dissemination of Disability Research.
- Rogers, E. S. (2003). Editor, Special Issue in Psychiatric Disability. *Journal of Vocational Rehabilitation*.
- Rogers, E.S., Walsh, D., Danley, K.S., & Smith. (1991). *Massachusetts client preference assessment: Final report*. Boston, MA: Boston University, Center for Psychiatric Rehabilitation.
- Rogers, E. S., Anthony, W., & Jansen, M. (1987). Editors, Special Issue on Psychiatric Rehabilitation. *Rehabilitation Psychology*, 33(1).
- Rogers, E. S. (1980). The effects of structured experiential training on the psychosocial adjustment of severely disabled individuals. Boston University: Unpublished doctoral dissertation.

Research Instruments Developed:

Rogers, E. S., Russinova, Z., & Millner, U. *Multi-Dimensional Scale of Community Participation*. (2017). Copyright, Trustees of Boston University.

Russinova, Z. Ellison, M. L. & Rogers, E. S. (2006). *Recovery Promoting Relationship Scale*. A 24-item instrument designed to measure the recovery promoting competencies and skills of mental health practitioners. Copyright, Trustees of Boston University. This instrument is being used in mental health programs nationally.

Sciarappa, K., & Rogers, E. S. (1997; Rogers et al., 2010). *Empowerment Scale*. A 28-item scale designed to measure construct of psychological empowerment. Copyright, Trustees of Boston University. The Empowerment Scale has been translated into Spanish, Italian, Dutch, Swedish and Japanese. It has been used in programs nationally and internationally, including mental health programs, federally funded studies, and by the Veterans Administration. Internationally, the Scale has been requested by the following countries for use: Switzerland, Italy, Japan, Thailand, the Philippines, the United Kingdom, Australia, the Netherlands, Scotland (for distribution through the National Health Service), Sweden (Hansson & Bjorkman, 2005), Pakistan, and Finland. The Empowerment Scale has been used in two multi-site, federally funded studies and is planned for use in a 20-country Pan European study that was conducted by King's College, Institute of Psychiatry in England.

Diksa, E. & Rogers, E. S. (1996). Survey of attitudes of employers towards individuals with mental illness. This instrument was developed to assess how employers view individuals with mental illness in a worker role as a means of determining how best to combat stigma in the workplace.

Rogers, E. S., Hursh N. C., Spaniol, L. J., Kielhofner, G., & Dellario, D. J. (1990). *Situational Assessment Tool*. A 35-item instrument designed to measure interpersonal skills and work adjustment skills of persons with psychiatric disability. Copyright, Trustees of Boston University. This instrument is being used in numerous vocational programs nationally as well as a currently funded NIH funded study on functional assessment.

Honors and Awards:

- 2015 Dincin Fellow by the Psychiatric Rehabilitation Association.
- First Place 2007 ARCA Research Award, American Rehabilitation Counseling Association, American Rehabilitation Counseling Association, for the following manuscript: "A randomized clinical trial of vocation rehabilitation for people with psychiatric disabilities" published in the Rehabilitation Counseling Bulletin.
- Loeb Award, International Association of Psychosocial Rehabilitation Services, Award for Achievement in Research in Psychosocial Rehabilitation, 2000.
- Highest Scholastic Ranking of Graduates, Sargent College of Allied Health Professions, Boston University, 1981.

- Honorable Mention Research Award, American Association for Counseling and Development, ARCA Division, 1986.

Presentations to Professional Groups:

Rogers, E. S. Development of a Multi-Dimensional Measure of Community Participation and Inclusion, Presented at the Symposium on Community Participation. 125th Annual Meeting of the American Psychological Association. Washington DC. August 5, 2017.

Rogers, E. Teixeira, C., Harrington, S. & Cronise, R. Invited Speaker. The Peer Specialist Workforce: Results of a National Survey. Part of a symposium on “Opportunities and Challenges in Workplace Inclusion for Individuals with psychiatric disabilities”. Delivered at the Work, Stress and Health Conference, NIOSH, American Psychological Association. Minneapolis, MN, June 8, 2017.

Rogers, E. & Millner, U. Measurement initiatives: Work, Community, and Recovery. Tufts University, Department of Occupational Therapy. March 28, 2017.

Rogers, E. Peer delivered services: State of the field and the science. University of Nottingham, Institute of Mental Health Innovation. UK: Nottingham. January 19, 2017.

Rogers, E. Invited Speaker. Peer delivered services: State of the field and of the science. Telecare Annual Leader’s Conference. Oakland CA, November 16, 2016.

Rogers, E. S. Webinar on Recovery Outcomes. Substance Abuse and Mental Health Services Administration BRSS TACS Policy Academy, August 18, 2016.

Rogers, E. Discussant. Identifying the Benefits of Peer Support. National Institute of Mental Health 23rd Annual Mental Health Services Research Conference. Bethesda MD, August 1, 2016.

Cronise, R., Teixeira, C., Rogers, E. S., Harrington, S., & Bernstein, A. The Peer Specialist Workforce: Results of a National Survey. Presented at: the 17th Annual Summer Institute, Multisystem Approaches to Recovery and Resilience. Arizona State University Center for Applied Behavioral Health Policy, Sedona, Arizona, July 21, 2016.

Cronise, R., Teixeira, C., Rogers, E. S., Harrington, S., & Bernstein, A. The peer specialist workforce: results of a national survey. Presentation at the Psychiatric Rehabilitation Association National Conference, Boston MA, May 23, 2016.

Nicolellis, D., Teixeira, C., Russinova, Z., Rogers, E. S. & Rapp, J. Improving providers’ competencies to promote vocational recovery among people with the lived experience of a psychiatric condition. Presentation at the Psychiatric Rehabilitation Association National Conference, Boston MA, May 25, 2016.

- Gordon, C., Arcure, K., Gidugu, V., & Rogers, E. S. Open Dialogue: A Recovery-Oriented Practice-The Collaborative Pathway. Presentation at the Psychiatric Rehabilitation Association National Conference, Boston MA, May 25, 2016.
- Rogers, E. S. & Millner, U. Assessing the work functioning of individuals with psychiatric disabilities: Preliminary results from the validity studies of the Functional Assessment Battery. Presentation at the NARRTC national conference, Alexandria, VA, May 5, 2016.
- Rogers, E. S. Webinar on Recovery Outcomes. Substance Abuse and Mental Health Services Administration BRSS TACS Policy Academy, March 21, 2016.
- Millner, U.C., Russinova, Z., & Rogers, E.S. Taking steps: Understanding community as defined by individuals with psychiatric disabilities. Paper presented at the American Psychological Association Annual Convention, Toronto, Canada, August 6, 2015).
- Teixeira, C., Russinova, Z., & Rogers, E. S. Providers' Competencies to Facilitate Vocational Recovery and Employment Outcomes. Presentation as part of the Symposium "Promising Approaches Promoting the Employment of Individuals with Serious Mental Illnesses" at the American Psychological Association Annual Convention, Toronto, Canada, August 6, 2015.
- Rogers, E. S., Russinova, Z., Millner, U., Gidugu, V., & Maru, M. Vocational recovery. Presentation at the University of Massachusetts Medical School Transitions Research and Training Center. Worcester, MA, June 18, 2015.
- Rogers, E. S. & Maru, M. Vocational Peer Support: Findings from our randomized clinical trial. Recovery Innovations, Phoenix, AZ. May 28, 2015.
- Rogers, E. S. Invited Presentation. Peer support research. The 2015 Bringing Recovery Supports to Scale Policy Academy Webinar, May 5, 2015.
- Rogers, E. S. Russinova, Z., Maru, M., Nicolellis, D., Bloch, P. & Teixeira, C. Promising peer delivered practices designed to support vocational exploration and recovery. Presentation at the Annual Psychiatric Rehabilitation Association Meeting, Philadelphia, PA., June 2, 2015.
- Rogers, E. S. & Maru, M. (2015). Peer delivered services: State of the art and state of the science. Presentation at NARRTC National Conference, Alexandria, VA, May 1, 2015.
- Rogers, E. S., Millner, U. & Maru, M. Assessing the work functioning of individuals with psychiatric disabilities: Preliminary results from the validity studies of the Functional Assessment Battery. Presentation at the Health and Disability Institute, School of Public Health, Boston, MA., March 25, 2015.
- Rogers, E. S. Invited presenter. Randomized trial of an integrated health and mental healthcare intervention. Podcast. [http://www.cmhsrp.uic.edu/health/summit14/documents/Improving%20Health%20and%20Well-](http://www.cmhsrp.uic.edu/health/summit14/documents/Improving%20Health%20and%20Well-Well-)

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Being%20for%20Adults%20in%20Public%20Mental%20Health%20Systems_S%20Rogers.mp3. Summit on Integrated Health Care, University of Illinois at Chicago RRTC. October, 16-17, 2014.

Rogers, E. S. Invited Speaker. Vocational Recovery Initiatives. Bedford Veteran Administration Grand Rounds, Bedford, MA, June 10, 2014.

Rogers, E. S. Invited speaker. Supported education for adults with psychiatric disabilities. Transitions RRTC State of the Sciences Conference, Washington, DC, September 24, 2013.

Rogers, E. S. Invited Speaker. Peer support services: State-of-the-Art. San Francisco Veterans' Administration Grand Rounds, San Francisco, CA, September 6, 2013.

Millner, U.C., Rogers, E.S., Bloch, P., Costa, W., Pritchard, S. & Woods, T. Connecting worlds: Exploring the meaning of work for adults with mental illness from a vocational psychology perspective. Poster presented at the 121st annual convention organized by the American Psychological Association, Honolulu, Hawaii, August 1, 2013.

Rogers, E. S. (2012). Invited Plenary Speaker. National Mental Health America National Conference: From Housing to Recovery, Tools to Support True Social Inclusion and Community Integration, Research on Supported Housing, Peer Support and Supported Education, Tulsa, OK, September 21, 2012.

Rogers, E. S. (2012). Peer delivered services: state of the art and the science. 11th World Congress, World Association of Psychosocial Rehabilitation, Milan Italy, November 11, 2012.

Rogers, E. S. (2012). Invited Presenter. Comparative Effectiveness Research and Mental Health. New Frontiers in disability-related Comparative Effectiveness Research, a conference sponsored by the Agency for Healthcare Quality and Research, Boston University, Boston, MA, June 22, 2012.

Farkas, M. & Rogers, E. S. (2012). Knowledge transfer process for systematic reviews: Grading research quality for stakeholder organizations. Presentation at NARRTC Conference, Alexandria, VA, April 27, 2012.

Rogers, E. S. Maru, M., Cohee, J., Hinkel, J., Effectiveness of peer delivered services for individuals completing a civil commitment. Presentation at the 36th Annual USPRA Conference, Boston, June 13, 2011.

Restrepo-Toro, M., Russinova, Z., Rogers, E.S., Maru, M., Diaz, L. (2011). Fostering therapeutic alliances using feedback from services recipients. Poster Session at the 36th Annual USPRA Conference, Boston, June 14, 2011.

Rogers, E. S., Gidugu, V., Bloch, P. (2011). Improving the Infrastructure of Employment Systems through Interagency Collaboration: Lessons from the New England State Medicaid Infrastructure Grants. Presentation at NARRTC Conference, Alexandria, VA, April 27, 2011.

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- Rogers, E. S., Boardman, J., Mesidor, M & Maru, M. Evaluation of a health access and integration intervention. Presented at the 35th USPRA Annual Conference: Expanding the Horizon of Psychiatric Rehabilitation. Boise, ID. June 14, 2010.
- Ashcraft, L., Russinova, Z. & Rogers, E. Recovery Promoting Relationship Scale. Institute #4. Presented at the 35th USPRA Annual Conference: Expanding the Horizon of Psychiatric Rehabilitation. Boise, ID. June 16, 2010.
- Rogers, E. S. & Huber, M. Recruitment and retention in disability research. Presentation to the NARRTC Annual Conference. Alexandria, VA, May 3, 2010.
- Rogers, E. S. & Russinova, Z. Hope as an essential ingredient of recovery-promoting competencies for practitioners. Invited presentation. Bethesda, MD: SAMHSA Innovations Conference, April 30, 2009.
- Rogers, E. S., Boardman, J., & MacDonald-Kash, M. Evaluation of a health access and integration intervention. Presented at the National Association of State Mental Health Program Directors Research Institute 19th Annual Conference on Integrated Healthcare Washington, DC. April 15, 2009.
- Russinova, Z., Rogers, E., and Restrepo-Toro, M. Measuring recovery promoting competencies for English and Spanish speaking mental health populations. From Innovations to Practice: The promise and challenge of achieving recovery for all. Center for Psychiatric Rehabilitation Conference, Cambridge, MA, April 14, 2008.
- Campbell, J., Teague, G., Rogers, E. S., Lyass, A. Consumer-Operated Service Programs Results. From Innovations to Practice: The promise and challenge of achieving recovery for all. Center for Psychiatric Rehabilitation Conference, Cambridge, MA, April 14, 2008.
- Rogers, E. S. Disability Measurement and Disparities Research. National Association of Research and Training Centers, 30th Annual Conference, Washington DC, April 21, 2008.
- Rogers, E. S. Identification of evidence based communication messages. Invited presentation at the University of Missouri Research and Training Center State-of-the-Science Conference entitled *Health Communication in the New Media Landscape*. Columbia Missouri, June 19, 2007.
- Rogers, E. S. Empirical evidence of the physical health problems for individuals with severe mental illness. Presentation at *The Challenge of Promoting Health in Persons with Serious and Persistent Mental Illness*, a joint conference of the Boston University School of Medicine and the Center for Psychiatric Rehabilitation, Cambridge, Massachusetts, March 31, 2007.
- Rogers, E. S. The broader landscape of rehabilitation and recovery. Grand Rounds presentation to the Departments of Psychiatry, Social Work and Psychology, Desert Vista Psychiatric Hospital, Phoenix, Arizona, February 15, 2007.
- Rogers, E. S. Invited Speaker. Implementation and evaluation of a combined supported education and employment computer training program for persons with psychiatric

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disabilities. Presentation at the UPENN Collaborative on Community Integration and the National State of the Knowledge Conference on Increasing Community Integration of Individuals with Psychiatric Disabilities, Philadelphia, PA, September 20, 2006.

Rogers, E. S. Invited Speaker. The power of the relationship in promoting recovery: Measuring our impact. New York Association for Psychosocial Rehabilitation Services, September 27, 2006.

Rogers, E. S. Invited Speaker. How to Plan and Conduct a Program Evaluation. New York Association for Psychosocial Rehabilitation Services, September 28, 2006.

Bowers, A., Rogers, E. S., Dunn, E. & Wan, Y. A process and outcome evaluation of an innovative model of service delivery. Presentation at the Annual National USPRA Conference, Phoenix, AZ, June 6, 2006.

Rogers, E. S. Presentation on Participatory Action Research. National Association of Research and Training Centers, 28th Annual Conference, Washington DC, April 27, 2006.

Rogers, E. S. Invited Speaker. The broader landscape of rehabilitation and recovery. 10th Annual Conference: Neuro-cognitive Function, Treatment and Outcome in Schizophrenia: From science to Practice. Harvard Medical School, Department of Continuing Education and Department of Psychiatry at the Massachusetts Mental Health Center and Beth Israel Deaconess Medical Center. Fairmont Copley Plaza Hotel, Boston Massachusetts. April 8, 2006.

Rogers, E. S. Invited Speaker. Predictors of vocational rehabilitation among individuals with serious psychiatric disability. National Organization of Social Security Claimants' Representatives, Social Security Disability Conference. Boston Marriott Copley Place, Boston, Massachusetts, April 5, 2006.

Rogers, E. S. Invited Speaker. Recovery-Oriented Rehabilitation. Research Grand Rounds, Massachusetts Mental Health Center, Shattuck Hospital, Boston, MA, February 16, 2006.

Russinova, Z., Rogers, E. S., & Ellison, M. Conceptualization and assessment of mental health practitioners' recovery promoting competence. National Association of State Mental Health Program Directors, 16th Annual Conference, Baltimore, MD, February 12-14, 2006.

Rogers, E. S. Invited Speaker. Using large databases to examine outcomes for individuals with psychiatric disabilities. Panel Presentation for: Visioning an Institute on Disability and Education. University of Memphis, June 29, 2005.

Rogers, E. S., Wan, Y. M., Dunn, E., McCorkle, B. Increasing social support for individuals with serious mental illness: Results of a social, adjunctive intervention. 18th Annual National Institute of Mental Health Conference on Mental Health Services Research NIMH Conference on Mental Health Services Research, Bethesda, MD, July 19, 2005.

Rogers, E. S. Invited Speaker. Recovery oriented services. Presentation to the Mental Health and Disability Annual Conference of the Disability Statistics Center, Washington, DC, October 28th, 2002.

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- Rogers, E. S. & DeForest, K. Lessons learned from the SAMHSA consumer operated study. Center for Psychiatric Rehabilitation International Innovations Conference, Boston, MA, October 25th, 2002.
- Mowbray, C. & Rogers, E. S. New advances in rehabilitation research. Center for Psychiatric Rehabilitation International Innovations Conference. October 25th, 2002, Boston, MA.
- Rogers, E. S. Participatory Action Research. National Association of Research and Training Centers, Annual Conference, Washington DC, April, 2001.
- Rogers, E. S. A randomized controlled study of psychiatric vocational rehabilitation. Presentation at the 4th biennial research seminar on work. Matrix Research and Training Center, Philadelphia, PA, October 12, 2000.
- Rogers, E.S. Program Evaluation Institute. Presentation at the IAPSRs national conference, Washington, DC, May 2000.
- Rogers, E.S. Psychiatric Rehabilitation. Invited presentation to a county-wide mental health conference, San Diego, CA, November 1999.
- Rogers, E.S. Study of Consumer Operated Services. Presentation to the statewide mental health providers, Des Moines, IA, October 1999.
- Rogers, E. S. Theory and practice of psychosocial rehabilitation: Critical reflections. Guest lecture at the Universidad Internacional Mendez Pelayo, Valencia, Spain, June 1999.
- Rogers, E. S. Round table presentation on current and future trends in psychosocial rehabilitation of persons with chronic mental illness at the Universidad Internacional Mendez Pelayo, Valencia, Spain, June 1999.
- Rogers, E.S. Program Evaluation. Presented at the IAPSRs National Conference, Orlando, FL, June 14, 1998.
- Rogers, E.S. Developing an Outcome Management System: A two-day CARF workshop. Boston University, Sargent College of Health and Rehabilitation Sciences, Boston, MA., June 24-25, 1998.
- Rogers, E.S. Psychiatric Rehabilitation. Invited presenter at a national conference entitled: "Facilitating Careers for Mental Health Consumers" Chicago, IL, April 13, 1998.
- Rogers, E.S. Trends in psychiatric rehabilitation. Invited presentation at the National Association of Research and Training Center Directors. Washington, D.C., April 27, 1998.
- Rogers, E.S. Psychiatric rehabilitation research. Presentation to the National Institute on Disability and Rehabilitation Research. Bethesda, MD, October 17, 1997.
- Rogers, E.S. How to conduct program evaluation. Albert Treischman Center Annual Conference, Hyatt Regency Hotel, Cambridge, MA, March 20, 1997.

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- Rogers, E. S. How to develop a program evaluation initiative in your organization. Presented to the Massachusetts Council of Human Science Providers, Boston, MA, October 8, 1996.
- Rogers, E. S. Advanced Research Institute. Presented at the IAPSRS National Conference, Detroit, MI, June 18, 1996.
- Rogers, E. S. Outcome Research Round table. Presented at the World Association of Psychosocial Rehabilitation, Rotterdam, The Netherlands, April, 23, 1996.
- Rogers, E. S. Vocational outcome research: Findings and implications for further research. Presented at the Boston University, Center for Psychiatric Rehabilitation Research Colloquium, Boston, MA, April 17, 1996.
- Rogers, E. S. Measuring the cost effectiveness of vocational programs: Cost benefit analysis of vocational programs for persons with mental illness. Invited presentation at the First Annual National Research Seminar on Vocational Rehabilitation and Mental Illness, Matrix Research Institute, Philadelphia, PA, October 6, 1994.
- Rogers, E. S. Models and strategies for training rehabilitation researchers. Invited presentation to the National Association of Research and Training Centers. Washington, D.C., April 25, 1993.
- Rogers, E. S. Consumer involvement in research. Invited presentation to the Mental Health Research Study Group, Maine Department of Mental Health. Portland, ME, March 26, 1992.
- Rogers, E. S. Impact of the Americans with Disability Act upon research in psychiatric rehabilitation. Invited address to the 1991 National Council on Disability, Forum of the Americans with Disabilities Act: New Orleans, LA, October 24, 1991.
- Rogers, E. S., Sciarappa, K., Hutchinson, D., Barclay, K. Research on psychiatric rehabilitation: What have we learned and how can we use it? Presented at the 1991 Conference on Psychiatric Rehabilitation, Boston, MA, June 4, 1991.
- Rogers, E. S., Anthony, W. A., & Cohen, M. C. Prediction of vocational outcomes based on clinical and demographic indicators. Presented at the 98th Annual American Psychological Association Convention, Boston, MA, August 12, 1990.
- Nemec, P. N., Rogers, E. S., Mynks, D., Taylor, D., & Brown, M. E. Incorporating Psychiatric Rehabilitation into a clubhouse. Presented at the Third Annual National Psychiatric Rehabilitation Conference, Boston, MA, November 15, 1988.
- Rogers, E. S., McNamara, S., & MacDonald-Wilson, K. Direct Skills Teaching in a community residence. Presented at the Third Annual National Psychiatric Rehabilitation Conference, Boston, MA, November 16, 1988.
- Rogers, E. S. Predicting vocational outcomes in clients with psychiatric disability. Presented at the annual meeting of the National Association of Disability Examiners, Boston, November 2, 1988.

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Rogers, E. S., Tower, C., & Butler, A. Situational assessment: the best method of vocational assessment. Presented at the 2nd Annual National Psychiatric Rehabilitation Conference, Boston, MA, November, 1987.

Rogers, E. S., Selden, D., & Butler, A. Situational assessment of work skills in the severely psychiatrically disabled. Presented at the 95th annual meeting of the American Psychological Association, New York City, September 1, 1987.

Rogers, E. S. Predicting the vocational capacity of mentally impaired claimants. Presented at the 16th Annual National Organization of Social Security Claimants Representatives Conference, Washington, D.C., June 18, 1987.

Thurer, S., & Rogers, E. S. Mental health needs of the severely physically disabled. Presented at the 94th annual meeting of the American Psychological Association, Washington, D.C., August 22, 1986.

Thurer, S., Farkas, M. D., & Rogers, E. S. Chronic mental patients after deinstitutionalization: Trends in living independence and vocational status. Presented at the 91st meeting of the American Psychological Association, Anaheim, CA, August 27, 1983.

Dellario, D., Farkas, M., & Rogers, E. S. Long term follow-up of psychiatrically disabled clients: A client function reference approach. Presented to the 60th annual meeting of the American Orthopsychiatric Association, Boston, MA, April 7, 1983.

Mentoring Activities

Post Doctoral Fellowship Grant

Between 1991 and 2001, I was Principal Investigator of the Advanced Rehabilitation Research Training Grant awarded by the National Institute on Disability and Rehabilitation Research. In that role, I mentored approximately 15 post doctoral fellows. Included in that group was Dr. Zlatka Russinova who is currently a Senior Research Associate at the Center and Co-Principal Investigator (with me) on a Field Initiated award in 2006 by NIDRR. In addition, Dr. Nancy Wewiorski, a post-doctoral fellow, was a Research Associate at the Center for 4 years and is currently a researcher at the National Center on Homeless Families and Dr. David Webster, recipient of the Dudley Allen Sargent Award in 2006. A more recent post doctoral fellow, Dr. Uma Millner, was hired as a Research Specialist at the Center. A current fellow whom I mentor, Dr. Carina Teixeira, was awarded Dudley Allen Sargent College Research Fund in 2014.

Doctoral Dissertations Supervised - Member of Committee - Reader:Year

	<u>Student Name</u>	<u>Dissertation Title</u>	<u>College</u>
2017	Vasudha Gidugu	Adaptation and Implementation	School of Public Health,

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		of Open Dialogue in the United States	Boston University
2013	Sara Feng Hang Chang	Community participation among people who are homeless	College of Health and Rehabilitation Sciences: Sargent
2013	Dara Chan	Measuring community integration using geographic information systems (GIS) and participatory mapping techniques for people with disabilities who were once homeless	College of Health and Rehabilitation Sciences: Sargent
2012	Elizabeth Barfield Marfeo	Exploring mental health work related disability	Boston University School of Public Health
2005	Kim MacDonald Wilson	Feasibility of a self-report Interview of mental functions in the ICF: Cognitive interviewing with persons with work disabilities due to psychiatric conditions	College of Health and Rehabilitation Sciences: Sargent
2004	Amy Porter	Characteristics, Experiences and Earnings of Early Enrollees in Connecticut's Medicaid Buy-In Program	College of Health and Rehabilitation Sciences: Sargent
2000	Tom Puccio	Decision-making processes and factors in Catholic high school selection	Johnson & Wales University
1999	Anne Sullivan	A survey of binge eating disorders in overweight women with psychiatric disability	College of Health and Rehabilitation Sciences: Sargent
1998	Kim Gray	Analysis of seven factors to predict source use of persons with severe psychiatric disability	College of Health and Rehabilitation Sciences: Sargent
1997	Gerald Carmody	A study of teacher-student interaction patterns in the class	Boston University, School of Education
1996	Tom McCarthy	Use of a rehabilitation introduction group in MRC	College of Health and Rehabilitation Sciences: Sargent
1994	Edward Diksa	Employer attitudes toward hiring persons with psychiatric	College of Health and Rehabilitation Sciences:

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1990	Rita Lossee	disability Variables related to weight loss maintenance	Sargent College of Health and Rehabilitation Sciences: Sargent
1986	Steven Spangler	Treatment outcome of patients in a comprehensive pain program: Influence of hopelessness and depression	College of Health and Rehabilitation Sciences: Sargent

Peer Review:

2015	Peer review of the scientific research application for the Workers Compensation Board of Manitoba's Research and Workplace Innovation Program (RWIP). The RWIP promotes and funds workplace innovation, scientific research, training and education, and knowledge transfer projects related to the prevention of occupational injuries and illnesses and the treatment and safe return-to-work of injured and ill workers.
2013	ZonMW-Dutch Applied Research program grant reviewer for "Societal participation with Boston Psychiatric Rehabilitation for patients with severe mental illness: a cost effectiveness study.
2012	Health Research Board, Dublin Ireland. Review of proposal entitled: "Does early detection and treatment of psychosis improve employment outcomes?" Niall Turner, PI
2004	Rutgers University, College of Medicine and Dentistry, Peer Review of proposal on supported employment
2004	New Zealand Mental Health Council proposal on rehabilitation and recovery of individuals with severe mental illness
2002	National Institute of Mental Health, Special Emphasis Panel on Developing Centers
1994	Veteran's Administration, Chicago, Illinois. Peer Review of proposal entitled: Treatment Outcomes in Alcoholics with Cognitive Impairment.
1989, 1991, 1993	National Institute on Disability and Rehabilitation Research. Served as peer reviewer for research grants.

Journal Reviewer:

1988-present	<i>Psychiatric Rehabilitation Journal</i>
1988-2004	Guest Research Column Editor, <i>Community Support Network News</i>

2002-present	<i>Journal of Vocational Rehabilitation</i>
2002-2003	Ad Hoc Reviewer, <i>Mental Health Services</i>
2002-2004	American Psychological Association, Publications Division
2003	Ad Hoc Reviewer <i>Journal of Rehabilitation Research and Development</i>
2004-present	Ad Hoc Reviewer <i>Schizophrenia Bulletin, Community Mental Health Journal and Journal of Nervous and Mental Disease, Social Psychiatry and Psychiatric Epidemiology, Psychiatric Services, Schizophrenia Research, Clinical Schizophrenia and Related Psychosis, Journal of Emotional and Behavioral Disorder, Journal of Mental Health</i>

Research Consultancies:

2015-present	US Department of Justice, Evaluation Consultant for class action lawsuits involving individuals with disabilities.
2005-present	Center for Public Representation, Northampton, MA. Evaluation consultant on the landmark Rosie D. class action lawsuit for children’s mental health; on the New Hampshire class action lawsuit for adult mental health and on an Oregon class action lawsuit on employment services for individuals with developmental disabilities.
1985-2005	Adcare Hospital, Worcester, MA. Consultation to Dr. Patrice Muchowski to develop patient follow-up questionnaires and to analyze and interpret survey data.
1993 – 94/2000-05	State of Florida, Department of Children’s and Families class action, Johnson v. Regier lawsuit for the treatment of individuals with severe mental illness in a state hospital and the development and execution of an audit protocol.
2000-2001	Logan Airport Safety Project. Evaluation Consultant to work team designed to improve air safety at Logan Airport.
2001 - 2005	Urban Institute, Washington DC. Research design consultant on a Social Security projects on the return to work of people with disabilities.
1997-1998	Work Family Directions. Consultant to design and validate a workplace survey
1994 - 1996	Dare Family Services, Inc. Consultation to develop a management information system to evaluate client outcomes.

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- 1994 - 2000 Longwood Treatment Facility. Consultation to develop a program evaluation/MIS system to evaluate outcomes of program.
- 1993/1995 Massachusetts Rehabilitation Commission, Psychiatric Rehabilitation Training Program. Analysis of trainee knowledge and skills in psychiatric rehabilitation.
- 1992 Fairlawn Rehabilitation Hospital, Worcester, MA. Research consultant on Robert Wood Johnson Foundation Grant to develop a functional assessment instrument for out-patient rehabilitation settings.
- 1991 - 1995 Center for the Study of Communication and Deafness, School of Education, Boston University, Boston, MA. Consultation to Professor Robert Hoffmeister on analyses of tests designed to measure language among deaf children.
- 1990 - 1992 Barbara Nicholson, Ph.D., Professor of Social Work, Boston College, Boston, MA. Consultation to Dr. Nicholson who is a National Institute of Mental Health Faculty Scholar performing original survey research on the psychological and social adjustment of Southeast Asians.
- 1986 - 1994 Possibilities, Inc., Basking Ridge, NJ. Consultation on analysis of employee satisfaction surveys to this organizational development firm.
- 1986 - 1987 Massachusetts Mental Health Center, Developmental Disabilities Unit, Boston, NM. Consultation to Dr. Linda Isaacs and Dr. Rhoda Goodwin on a study of family adaptation and functioning among children with developmental disabilities.
- 1985 - 1986 Occupational Therapy Department, Sargent College, Boston University, Boston, MA. Consultation to Professor Gary Kielhofner regarding reliability and validity studies of a functional assessment instrument.
- 1984 Brockton Office of the Massachusetts Rehabilitation Commission, Brockton, MA. Consultant on staff development.

Research Consultancies to Doctoral, Masters' and Bachelors' Students:

- 2006 Consensus panel on meaning of empowerment for older adults with psychiatric disabilities, Jose Lopez, St Charles Hospital, London
- 1994 MaryBeth Pappas Gaines, M.A. candidate in education, University of Vermont. Thesis title: *Health Promotion, Environment and Social Cognitive Perception: A Study of the Relationships Among Self-Efficacy, Corporate Culture and Health Behavior change.*

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- 1993 Eric Green, B.A. candidate in psychology, St. Anselm's College, Manchester, New Hampshire. Thesis title: *Effect of a Short-term Exercise Intervention in Anxiety Among College Students.*
- 1993 Deborah Dutton, Ph.D. candidate in psychology, University of Rhode Island. Dissertation title: *Effect of a Short-term Educational Intervention in Gender Stereotyping.*
- 1993 David Kalman, Ph.D. Candidate in Social Work, Simmons College, Boston, MA. Dissertation title: *Prediction of Alcoholic and Drug Abuse Among Adolescents.*
- 1992 Robert Hammaker, Ed.D. Candidate in Educational Leadership, School of Education, Boston University. Dissertation Title: *Assessing Mental Health Consumer Needs in Alaska.*
- 1991 Marguerite Franca-Terceira Psy.D. Candidate in Psychology, Rutgers University. Dissertation Title: *Fee Setting for Low-Income Clients: Decision Making Processes of Psychologists in Private Practice.*
- 1991 Lisa Gutkowski, M.S. Candidate in Occupational Therapy, University of Illinois at Chicago. Dissertation Title: *Assessing the Reliability of the Occupational Performance History Interview.*
- 1990 Michael Lavoie, Ph.D. Candidate in Psychology, California School of Professional Psychology. Dissertation Title: *Social Adjustment Among Traumatically Brain Injured.*
- 1990 Marge Terrafranca, Psy.D. Candidate in Psychology, Rutgers University. *Survey of the Private Practice of Psychologists.*
- 1987 Rodney Dismukes, Ph.D. Candidate in Psychology at Auburn University. Dissertation Title: *Relationship Between Social Support Systems and Outcomes of Brief Psychiatric Hospitalization.*
- 1986 Mary MacNamee, Ed.D. Candidate in Counseling Psychology at Columbia University, Teachers College. Dissertation Title: *Deaf and Hearing Persons Perceptions and Evaluation of Interpersonal Behavior in the American Deaf Culture.*
- 1986 Barbara Middleton, M.S. Candidate in Occupational Therapy, Boston University. Thesis Title: *Role Identity and Burnout Among Psychosocial Occupational Therapists.*

Committees, Board of Directors, and Related Professional Duties:

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2017	Scientific Advisory Committee, Social and Community Re-Integration Research, Edith Nourse Rogers Memorial Veterans' Administration
2011	Advisory Board, University of New Hampshire, Institute on Disability
2010	Dr. Steven Haley and Dr. Alan Jette Social Security Disability Determination Re-Design project
2009	Advisory Board, Center for Public Mental Health Research, Boston Medical School Department of Psychiatry
2006-present	Board of Directors, Adcare Educational Institute, Worcester, MA. Adcare Educational Institute is a non-profit entity devoted to enhancing educational and training experiences for professionals in the substance abuse field.
2006	Expert Panel on defining health and wellness for individuals with disabilities for the RRTC on Disability and Wellness at the Oregon Institute on Disability and Development.
2004-present	Advisory Council-University of Pennsylvania Research and Training Center.
2003-2004	Federal Rehabilitation Services Administration; IRI Conference-Invited Scholar
2001-present	President Elect, President and Past President, Member at Large, National Association of Rehabilitation Research and Training Centers
2000	Program Planning Committee, National Association of Rehabilitation Research and Training Centers for NARRTC 2000 Conference
1996-1998	Co-Chair, Research Committee, International Association of Psychosocial Rehabilitation Services
1994	Boston University, Sargent College, Human Subjects Committee
1994-2001	Research Committee, International Association of Psychosocial Rehabilitation Services
1988-2002; 2007-present	Board of Directors, Adcare Educational Institute, Worcester, MA. Adcare Educational Institute is a non-profit entity devoted to enhancing educational and training experiences for professionals in the substance abuse field.

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1990 - 1992 Research Committee, National Association of Research and Training Centers

1988-1999 *Community Support Network News*, Guest Research Column Editor

Other Committees:

Dudley Allan Sargent College of Health and Rehabilitation Science Research Awards; Sargent College of Health and Rehabilitation Sciences Strategic Planning Committee.

Attachment B

Steward v. Smith
Case No. 5:10-CV-1025-OLG
In the United States District Court for the Western District of Texas
San Antonio Division

REPORT OF DR. E. SALLY ROGERS
Attachment B

No.	Document	Bates Number
1.	TXIDD NH Universe Listing 20170527	US00257640
2.	Statewide Findings	US00257014-257015
3.	Email from Jessica Polansky to Sally Rogers re Geographic information, dated March 28, 2018	US00261267