

# State Plan for the State Vocational Rehabilitation Services Program and State Plan Supplement for the State Supported Employment Services Program

## Montana Dept of Public Health + Human Services - Division of Disability Services State Plan for Fiscal Year 2012 (submitted FY 2011)

### Preprint - Section 1: State Certifications

- 1.1 The **DPHHS - Disability Employment Independence & Transitions** is authorized to submit this State Plan under Title I of the Rehabilitation Act of 1973, as amended [1] and its supplement under Title VI, Part B, of the Rehabilitation Act [2].
- 1.2 As a condition for the receipt of federal funds under Title I, Part B, of the Rehabilitation Act for the provision of vocational rehabilitation services, the **DPHHS - Disability Employment Independence & Transitions** [3] agrees to operate and administer the State Vocational Rehabilitation Services Program in accordance with the provisions of this State Plan [4], the Rehabilitation Act, and all applicable regulations [5], policies and procedures established by the secretary. Funds made available under Section 111 of the Rehabilitation Act are used solely for the provision of vocational rehabilitation services under Title I of the Rehabilitation Act and the administration of the State Plan for the vocational rehabilitation services program.
- 1.3 As a condition for the receipt of federal funds under Title VI, Part B, of the Rehabilitation Act for supported employment services, the designated state agency agrees to operate and administer the State Supported Employment Services Program in accordance with the provisions of the supplement to this State Plan [6], the Rehabilitation Act and all applicable regulations [7], policies and procedures established by the secretary. Funds made available under Title VI, Part B, are used solely for the provision of supported employment services and the administration of the supplement to the Title I State Plan.  
Yes
- 1.4 The designated state agency and/or the designated state unit has the authority under state law to perform the functions of the state regarding this State Plan and its supplement.  
Yes
- 1.5 The state legally may carry out each provision of the State Plan and its supplement.  
Yes
- 1.6 All provisions of the State Plan and its supplement are consistent with state law.  
Yes
- 1.7 The (enter title of state officer below)  
Yes  
Fiscal Operations Bureau Chief  
... has the authority under state law to receive, hold and disburse federal funds made available under this State Plan and its supplement.
- 1.8 The (enter title of state officer below)...  
Yes  
Disability Employment Independence & Transitions Director  
... has the authority to submit this State Plan for vocational rehabilitation services and the State Plan supplement for supported employment services.
- 1.9 The agency that submits this State Plan and its supplement has adopted or otherwise formally approved the plan and its supplement.  
Yes  
State Plan Certified By  
As the authorized signatory identified above, I hereby certify that I will sign, date and retain in the files of the designated state agency/designated state unit Section 1 of the Preprint, and separate Certification of Lobbying forms (Form ED-80-0013; available at <http://www.ed.gov/fund/grant/apply/appforms/ed80-013.pdf>) for both the vocational rehabilitation and supported employment programs.

Signed?

Yes

Name of Signatory

Jim Marks

Title of Signatory

Disability Employment Independence & Transitions Director

Date Signed (mm/dd/yyyy)

06/28/2011

Assurances Certified By

The designated state agency and/or the designated state unit provide the following assurance(s) in connection with the approval of the State Plan for FY 2012

Yes

Comments:

Signed?

Yes

Name of Signatory

Jim Marks

Title of Signatory

Disability Employment Independence & Transitions Director

Date Signed (mm/dd/yyyy)

06/28/2011

\* The signatory of the assurance with the authority to execute and submit the State Plan will maintain a signed copy of the assurance(s) with the signed State Plan.

Section 1 Footnotes

[1] Public Law 93 112, as amended by Public Laws 93 516, 95 602, 98 221, 99 506, 100-630, 102-569, 103-073, and 105-220.

[2] Unless otherwise stated, "Rehabilitation Act" means the Rehabilitation Act of 1973, as amended.

[3] All references in this plan to "designated state agency" or to "the state agency" relate to the agency identified in this paragraph.

[4] No funds under Title I of the Rehabilitation Act may be awarded without an approved State Plan in accordance with Section 101(a) of the Rehabilitation Act and 34 CFR part 361.

[5] Applicable regulations include the Education Department General Administrative Regulations (EDGAR) in 34 CFR Parts 74, 76, 77, 79, 80, 81, 82, 85 and 86 and the State Vocational Rehabilitation Services Program regulations in 34 CFR Part 361.

[6] No funds under Title VI, Part B, of the Rehabilitation Act may be awarded without an approved supplement to the Title I State Plan in accordance with Section 625(a) of the Rehabilitation Act.

[7] Applicable regulations include the EDGAR citations in footnote 5, 34 CFR Part 361, and 34 CFR Part 363.

## **Preprint - Section 2: Public Comment on State Plan Policies and Procedures**

### **2.1 Public participation requirements. (Section 101(a)(16)(A) of the Rehabilitation Act; 34 CFR 361.10(d), .20(a), (b), (d); and 363.11(g)(9))**

**(a) Conduct of public meetings.**

The designated state agency, prior to the adoption of any substantive policies or procedures governing the provision of vocational rehabilitation services under the State Plan and supported employment services under the supplement to the State Plan, including making any substantive amendments to the policies and procedures, conducts public meetings throughout the state to provide the public, including individuals with disabilities, an opportunity to comment on the policies or procedures.

**(b) Notice requirements.**

The designated state agency, prior to conducting the public meetings, provides appropriate and sufficient notice throughout the state of the meetings in accordance with state law governing public meetings or, in the absence of state law governing public meetings, procedures developed by the state agency in consultation with the State Rehabilitation Council, if the agency has a council.

**(c) Special consultation requirements.**

The state agency actively consults with the director of the Client Assistance Program, the State Rehabilitation Council, if the agency has a council and, as appropriate, Indian tribes, tribal organizations and native Hawaiian organizations on its policies and procedures governing the provision of vocational rehabilitation services under the State Plan and supported employment services under the supplement to the State Plan.

## **Preprint - Section 3: Submission of the State Plan and its Supplement**

### **3.1 Submission and revisions of the State Plan and its supplement. (Sections 101(a)(1), (23) and 625(a)(1) of the Rehabilitation Act; Section 501 of the Workforce Investment Act; 34 CFR 76.140; 361.10(e), (f), and (g); and 363.10)**

- (a) The state submits to the commissioner of the Rehabilitation Services Administration the State Plan and its supplement on the same date that the state submits either a State Plan under Section 112 of the Workforce Investment Act of 1998 or a state unified plan under Section 501 of that Rehabilitation Act.
- (b) The state submits only those policies, procedures or descriptions required under this State Plan and its supplement that have not been previously submitted to and approved by the commissioner.
- (c) The state submits to the commissioner, at such time and in such manner as the commissioner determines to be appropriate, reports containing annual updates of the information relating to the:
  - 1. comprehensive system of personnel development;
  - 2. assessments, estimates, goals and priorities, and reports of progress;
  - 3. innovation and expansion activities; and
  - 4. other updates of information required under Title I, Part B, or Title VI, Part B, of the Rehabilitation Act that are requested by the commissioner.
- (d) The State Plan and its supplement are in effect subject to the submission of modifications the state determines to be necessary or the commissioner requires based on a change in state policy, a change in federal law, including regulations, an interpretation of the Rehabilitation Act by a federal court or the highest court of the state, or a finding by the commissioner of state noncompliance with the requirements of the Rehabilitation Act, 34 CFR 361 or 34 CFR 363.

### **3.2 Supported Employment State Plan supplement. (Sections 101(a)(22) and 625(a) of the Rehabilitation Act; 34 CFR 361.34 and 363.10)**

- (a) The state has an acceptable plan for carrying out Part B, of Title VI of the Rehabilitation Act that provides for the use of funds under that part to supplement funds made available under Part B, of Title I of the Rehabilitation Act for the cost of services leading to supported employment.
- (b) The Supported Employment State Plan, including any needed annual revisions, is submitted as a supplement to the State Plan.

## Preprint - Section 4: Administration of the State Plan

### 4.1 Designated state agency and designated state unit. (Section 101(a)(2) of the Rehabilitation Act; 34 CFR 361.13(a) and (b))

#### (a) Designated state agency.

1. There is a state agency designated as the sole state agency to administer the State Plan or to supervise its administration in a political subdivision of the state by a sole local agency.
2. The designated state agency is a state agency that is not primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities and includes a vocational rehabilitation unit as provided in paragraph (b) of this section. (Option A was not selected)
3. In American Samoa, the designated state agency is the governor.

#### (b) Designated state unit.

1. If the designated state agency is not primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities, in accordance with subparagraph 4.1(a)(2)(B) of this section, the state agency includes a vocational rehabilitation bureau, division or unit that:
  - A. is primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities and is responsible for the administration of the designated state agency's vocational rehabilitation program under the State Plan;
  - B. has a full-time director;
  - C. has a staff, at least 90 percent of whom are employed full-time on the rehabilitation work of the organizational unit; and
  - D. is located at an organizational level and has an organizational status within the designated state agency comparable to that of other major organizational units of the designated state agency.
2. The name of the designated state vocational rehabilitation unit is

Disability Employment Independence & Transitions

### 4.2 State independent commission or State Rehabilitation Council. (Sections 101(a)(21) and 105 of the Rehabilitation Act; 34 CFR 361.16 and .17)

The State Plan must contain one of the following assurances.

#### (a) The designated state agency is an independent state commission. (Option A was not selected)

#### (b) The state has established a State Rehabilitation Council that meets the criteria set forth in Section 105 of the Rehabilitation Act, 34 CFR 361.17 and the designated state unit.

1. jointly with the State Rehabilitation Council develops, agrees to and reviews annually state goals and priorities and jointly submits to the commissioner annual reports of progress in accordance with the provisions of Section 101(a)(15) of the Rehabilitation Act, 34 CFR 361.29 and subsection 4.11 of this State Plan;
2. regularly consults with the State Rehabilitation Council regarding the development, implementation and revision of state policies and procedures of general applicability pertaining to the provision of vocational rehabilitation services;
3. includes in the State Plan and in any revision to the State Plan a summary of input provided by the State Rehabilitation Council, including recommendations from the annual report of the council described in Section 105(c)(5) of the Rehabilitation Act and 34 CFR 361.17(h)(5), the review and analysis of consumer satisfaction described in Section 105(c)(4) of the Rehabilitation Act and 34 CFR 361.17(h)(4), and other reports prepared by the council and the response of the designated state unit to the input and recommendations, including explanations for rejecting any input or recommendation; and
4. transmits to the council:
  - A. all plans, reports and other information required under 34 CFR 361 to be submitted to the commissioner;
  - B. all policies and information on all practices and procedures of general applicability provided to or used by rehabilitation personnel in carrying out this State Plan and its supplement; and
  - C. copies of due process hearing decisions issued under 34 CFR 361.57, which are transmitted in such a manner as to ensure that the identity of the participants in the hearings is kept confidential.

#### (c) If the designated state unit has a State Rehabilitation Council, Attachment 4.2(c) provides a summary of the input provided by the council consistent with the provisions identified in subparagraph (b)(3) of this section; the response of the designated state unit to the input and recommendations; and, explanations for the rejection of any input or any recommendation.

### 4.3 Consultations regarding the administration of the State Plan. (Section 101(a)(16)(B) of the Rehabilitation Act; 34 CFR 361.21)

The designated state agency takes into account, in connection with matters of general policy arising in the administration of the plan and its supplement, the views of:

- (a) individuals and groups of individuals who are recipients of vocational rehabilitation services or, as appropriate, the individuals' representatives;
- (b) personnel working in programs that provide vocational rehabilitation services to individuals with disabilities;
- (c) providers of vocational rehabilitation services to individuals with disabilities;
- (d) the director of the Client Assistance Program; and
- (e) the State Rehabilitation Council, if the state has a council.

**4.4 Nonfederal share. (Sections 7(14) and 101(a)(3) of the Rehabilitation Act; 34 CFR 80.24 and 361.60)**

The nonfederal share of the cost of carrying out this State Plan is 21.3 percent and is provided through the financial participation by the state or, if the state elects, by the state and local agencies.

**4.5 Local administration. (Sections 7(24) and 101(a)(2)(A) of the Rehabilitation Act; 34 CFR 361.5(b)(47) and .15)**

The State Plan provides for the administration of the plan by a local agency. No

If "Yes", the designated state agency:

- (a) ensures that each local agency is under the supervision of the designated state unit with the sole local agency, as that term is defined in Section 7(24) of the Rehabilitation Act and 34 CFR 361.5(b)(47), responsible for the administration of the vocational rehabilitation program within the political subdivision that it serves; and
- (b) develops methods that each local agency will use to administer the vocational rehabilitation program in accordance with the State Plan.

**4.6 Shared funding and administration of joint programs. (Section 101(a)(2)(A)(ii) of the Rehabilitation Act; 34 CFR 361.27)**

The State Plan provides for the state agency to share funding and administrative responsibility with another state agency or local public agency to carry out a joint program to provide services to individuals with disabilities. No

If "Yes", the designated state agency submits to the commissioner for approval a plan that describes its shared funding and administrative arrangement. The plan must include:

- (a) a description of the nature and scope of the joint program;
- (b) the services to be provided under the joint program;
- (c) the respective roles of each participating agency in the administration and provision of services; and
- (d) the share of the costs to be assumed by each agency.

**4.7 Statewideness and waivers of statewideness. (Section 101(a)(4) of the Rehabilitation Act; 34 CFR 361.25, .26, and .60(b)(3)(i) and (ii))**

X This agency is not requesting a waiver of statewideness.

- (a) Services provided under the State Plan are available in all political subdivisions of the state.
- (b) The state unit may provide services in one or more political subdivisions of the state that increase services or expand the scope of services that are available statewide under this State Plan if the:
  - 1. nonfederal share of the cost of these services is met from funds provided by a local public agency, including funds contributed to a local public agency by a private agency, organization or individual;
  - 2. services are likely to promote the vocational rehabilitation of substantially larger numbers of individuals with disabilities or of individuals with disabilities with particular types of impairments; and
  - 3. state, for purposes other than the establishment of a community rehabilitation program or the construction of a particular facility for community rehabilitation program purposes, requests in Attachment 4.7(b)(3) a waiver of the statewideness requirement in accordance with the following requirements:
    - A. identification of the types of services to be provided;
    - B. written assurance from the local public agency that it will make available to the state unit the nonfederal share of funds;
    - C. written assurance that state unit approval will be obtained for each proposed service before it is put into effect; and
    - D. written assurance that all other State Plan requirements, including a state's order of selection, will apply to all services approved under the waiver.
- (c) Contributions, consistent with the requirements of 34 CFR 361.60(b)(3)(ii), by private entities of earmarked funds for particular geographic areas within the state may be used as part of the nonfederal share without the state requesting a waiver of the statewideness requirement provided that the state notifies the commissioner that it cannot provide the full nonfederal share without using the earmarked funds.

**4.8 Cooperation, collaboration and coordination. (Sections 101(a)(11), (24)(B), and 625(b)(4) and (5) of the Rehabilitation Act; 34 CFR 361.22, .23, .24, and .31, and 363.11(e))**

- (a) Cooperative agreements with other components of statewide work force investment system.

The designated state agency or the designated state unit has cooperative agreements with other entities that are components of the statewide work force investment system and replicates those agreements at the local level between individual offices of the designated state unit and local entities carrying out the One-Stop service delivery system or other activities through the statewide work force investment system.

**(b) Cooperation and coordination with other agencies and entities.**

Attachment 4.8(b) (1)-(4) describes the designated state agency's:

1. cooperation with and use of the services and facilities of the federal, state, and local agencies and programs, including programs carried out by the undersecretary for Rural Development of the United States Department of Agriculture and state use contracting programs, to the extent that those agencies and programs are not carrying out activities through the statewide work force investment system;
2. coordination, in accordance with the requirements of paragraph 4.8(c) of this section, with education officials to facilitate the transition of students with disabilities from school to the receipt of vocational rehabilitation services;
3. establishment of cooperative agreements with private nonprofit vocational rehabilitation service providers, in accordance with the requirements of paragraph 5.10(b) of the State Plan; and,
4. efforts to identify and make arrangements, including entering into cooperative agreements, with other state agencies and entities with respect to the provision of supported employment and extended services for individuals with the most significant disabilities, in accordance with the requirements of subsection 6.5 of the supplement to this State Plan.

**(c) Coordination with education officials.**

1. Attachment 4.8(b)(2) describes the plans, policies and procedures for coordination between the designated state agency and education officials responsible for the public education of students with disabilities that are designed to facilitate the transition of the students who are individuals with disabilities from the receipt of educational services in school to the receipt of vocational rehabilitation services under the responsibility of the designated state agency.
2. The State Plan description must:
  - A. provide for the development and approval of an individualized plan for employment in accordance with 34 CFR 361.45 as early as possible during the transition planning process but, at the latest, before each student determined to be eligible for vocational rehabilitation services leaves the school setting or if the designated state unit is operating on an order of selection before each eligible student able to be served under the order leaves the school setting; and
  - B. include information on a formal interagency agreement with the state educational agency that, at a minimum, provides for:
    - i. consultation and technical assistance to assist educational agencies in planning for the transition of students with disabilities from school to postschool activities, including vocational rehabilitation services;
    - ii. transition planning by personnel of the designated state agency and the educational agency for students with disabilities that facilitates the development and completion of their individualized education programs under Section 614(d) of the Individuals with Disabilities Education Act;
    - iii. roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining state lead agencies and qualified personnel responsible for transition services; and
    - iv. procedures for outreach to students with disabilities as early as possible during the transition planning process and identification of students with disabilities who need transition services.

**(d) Coordination with statewide independent living council and independent living centers.**

The designated state unit, the Statewide Independent Living Council established under Section 705 of the Rehabilitation Act and 34 CFR 364, and the independent living centers described in Part C of Title VII of the Rehabilitation Act and 34 CFR 366 have developed working relationships and coordinate their activities.

**(e) Cooperative agreement with recipients of grants for services to American Indians.**

1. There is in the state a recipient(s) of a grant under Part C of Title I of the Rehabilitation Act for the provision of vocational rehabilitation services for American Indians who are individuals with disabilities residing on or near federal and state reservations. **Yes**
2. If "Yes", the designated state agency has entered into a formal cooperative agreement that meets the following requirements with each grant recipient in the state that receives funds under Part C of Title I of the Rehabilitation Act:
  - A. strategies for interagency referral and information sharing that will assist in eligibility determinations and the development of individualized plans for employment;
  - B. procedures for ensuring that American Indians who are individuals with disabilities and are living near a reservation or tribal service area are provided vocational rehabilitation services; and
  - C. provisions for sharing resources in cooperative studies and assessments, joint training activities, and other collaborative activities designed to improve the provision of services to American Indians who are individuals with disabilities.

#### **4.9 Methods of administration. (Section 101(a)(6) of the Rehabilitation Act; 34 CFR 361.12, .19 and .51(a) and (b))**

(a) In general.

The state agency employs methods of administration, including procedures to ensure accurate data collection and financial accountability, found by the commissioner to be necessary for the proper and efficient administration of the plan and for carrying out all the functions for which the state is responsible under the plan and 34 CFR 361.

(b) Employment of individuals with disabilities.

The designated state agency and entities carrying out community rehabilitation programs in the state, who are in receipt of assistance under Part B, of Title I of the Rehabilitation Act and this State Plan, take affirmative action to employ and advance in employment qualified individuals with disabilities covered under and on the same terms and conditions as set forth in Section 503 of the Rehabilitation Act.

(c) Facilities.

Any facility used in connection with the delivery of services assisted under this State Plan meets program accessibility requirements consistent with the provisions, as applicable, of the Architectural Barriers Rehabilitation Act of 1968, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act of 1990 and the regulations implementing these laws.

#### **4.10 Comprehensive system of personnel development. (Section 101(a)(7) of the Rehabilitation Act; 34 CFR 361.18)**

Attachment 4.10 describes the designated state agency's procedures and activities to establish and maintain a comprehensive system of personnel development designed to ensure an adequate supply of qualified state rehabilitation professional and paraprofessional personnel for the designated state unit. The description includes the following:

(a) Data system on personnel and personnel development.

Development and maintenance of a system for collecting and analyzing on an annual basis data on qualified personnel needs and personnel development with respect to:

1. Qualified personnel needs.
  - A. The number of personnel who are employed by the state agency in the provision of vocational rehabilitation services in relation to the number of individuals served, broken down by personnel category;
  - B. The number of personnel currently needed by the state agency to provide vocational rehabilitation services, broken down by personnel category; and
  - C. Projections of the number of personnel, broken down by personnel category, who will be needed by the state agency to provide vocational rehabilitation services in the state in five years based on projections of the number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.
2. Personnel development.
  - A. A list of the institutions of higher education in the state that are preparing vocational rehabilitation professionals, by type of program;
  - B. The number of students enrolled at each of those institutions, broken down by type of program; and
  - C. The number of students who graduated during the prior year from each of those institutions with certification or licensure, or with the credentials for certification or licensure, broken down by the personnel category for which they have received, or have the credentials to receive, certification or licensure.

(b) Plan for recruitment, preparation and retention of qualified personnel.

Development, updating on an annual basis, and implementation of a plan to address the current and projected needs for qualified personnel based on the data collection and analysis system described in paragraph (a) of this subsection and that provides for the coordination and facilitation of efforts between the designated state unit and institutions of higher education and professional associations to recruit, prepare and retain personnel who are qualified in accordance with paragraph (c) of this subsection, including personnel from minority backgrounds and personnel who are individuals with disabilities.

(c) Personnel standards.

Policies and procedures for the establishment and maintenance of personnel standards to ensure that designated state unit professional and paraprofessional personnel are appropriately and adequately prepared and trained, including:

1. standards that are consistent with any national- or state-approved or recognized certification, licensing, registration, or, in the absence of these requirements, other comparable requirements (including state personnel requirements) that apply to the profession or discipline in which such personnel are providing vocational rehabilitation services.
2. To the extent that existing standards are not based on the highest requirements in the state applicable to a particular profession or discipline, the steps the state is currently taking and the steps the state plans to take in accordance with the written plan to retrain or hire personnel within the designated state unit to meet standards that are based on the highest requirements in the state, including measures to notify designated state unit personnel, the institutions of higher education identified in subparagraph (a)(2), and other public agencies of these steps and the time lines for taking each step.
3. The written plan required by subparagraph (c)(2) describes the following:
  - A. specific strategies for retraining, recruiting and hiring personnel;
  - B. the specific time period by which all state unit personnel will meet the standards required by subparagraph (c)(1);
  - C. procedures for evaluating the designated state unit's progress in hiring or retraining personnel to meet applicable personnel standards within the established time period; and

- D. the identification of initial minimum qualifications that the designated state unit will require of newly hired personnel when the state unit is unable to hire new personnel who meet the established personnel standards and the identification of a plan for training such individuals to meet the applicable standards within the time period established for all state unit personnel to meet the established personnel standards.

**(d) Staff development.**

Policies, procedures and activities to ensure that all personnel employed by the designated state unit receive appropriate and adequate training. The narrative describes the following:

- 1. A system of staff development for professionals and paraprofessionals within the designated state unit, particularly with respect to assessment, vocational counseling, job placement and rehabilitation technology.
- 2. Procedures for the acquisition and dissemination to designated state unit professionals and paraprofessionals significant knowledge from research and other sources.

**(e) Personnel to address individual communication needs.**

Availability of personnel within the designated state unit or obtaining the services of other individuals who are able to communicate in the native language of applicants or eligible individuals who have limited English speaking ability or in appropriate modes of communication with applicants or eligible individuals.

**(f) Coordination of personnel development under the Individuals with Disabilities Education Act.**

Procedures and activities to coordinate the designated state unit's comprehensive system of personnel development with personnel development under the Individuals with Disabilities Education Act.

**4.11. Statewide assessment; annual estimates; annual state goals and priorities; strategies; and progress reports.**

(Sections 101(a)(15), 105(c)(2) and 625(b)(2) of the Rehabilitation Act; 34 CFR 361.17(h)(2), .29, and 363.11(b))

**(a) Comprehensive statewide assessment.**

- 1. Attachment 4.11(a) documents the results of a comprehensive, statewide assessment, jointly conducted every three years by the designated state unit and the State Rehabilitation Council (if the state has such a council). The assessment describes:
  - A. the rehabilitation needs of individuals with disabilities residing within the state, particularly the vocational rehabilitation services needs of:
    - i. individuals with the most significant disabilities, including their need for supported employment services;
    - ii. individuals with disabilities who are minorities and individuals with disabilities who have been unserved or underserved by the vocational rehabilitation program carried out under this State Plan; and
    - iii. individuals with disabilities served through other components of the statewide work force investment system.
  - B. The need to establish, develop or improve community rehabilitation programs within the state.
- 2. For any year in which the state updates the assessments, the designated state unit submits to the commissioner a report containing information regarding updates to the assessments.

**(b) Annual estimates.**

Attachment 4.11(b) identifies on an annual basis state estimates of the:

- 1. number of individuals in the state who are eligible for services under the plan;
- 2. number of eligible individuals who will receive services provided with funds provided under Part B of Title I of the Rehabilitation Act and under Part B of Title VI of the Rehabilitation Act, including, if the designated state agency uses an order of selection in accordance with subparagraph 5.3(b)(2) of this State Plan, estimates of the number of individuals to be served under each priority category within the order; and
- 3. costs of the services described in subparagraph (b)(1), including, if the designated state agency uses an order of selection, the service costs for each priority category within the order.

**(c) Goals and priorities.**

- 1. Attachment 4.11(c)(1) identifies the goals and priorities of the state that are jointly developed or revised, as applicable, with and agreed to by the State Rehabilitation Council, if the agency has a council, in carrying out the vocational rehabilitation and supported employment programs.
- 2. The designated state agency submits to the commissioner a report containing information regarding any revisions in the goals and priorities for any year the state revises the goals and priorities.
- 3. Order of selection.  
If the state agency implements an order of selection, consistent with subparagraph 5.3(b)(2) of the State Plan, Attachment 4.11(c)(3):

- A. shows the order to be followed in selecting eligible individuals to be provided vocational rehabilitation services;
  - B. provides a justification for the order; and
  - C. identifies the service and outcome goals, and the time within which these goals may be achieved for individuals in each priority category within the order.
4. Goals and plans for distribution of Title VI, Part B, funds.  
Attachment 4.11(c)(4) specifies, consistent with subsection 6.4 of the State Plan supplement, the state's goals and priorities with respect to the distribution of funds received under Section 622 of the Rehabilitation Act for the provision of supported employment services.

**(d) Strategies.**

- 1. Attachment 4.11(d) describes the strategies, including:
  - A. the methods to be used to expand and improve services to individuals with disabilities, including how a broad range of assistive technology services and assistive technology devices will be provided to those individuals at each stage of the rehabilitation process and how those services and devices will be provided to individuals with disabilities on a statewide basis;
  - B. outreach procedures to identify and serve individuals with disabilities who are minorities, including those with the most significant disabilities in accordance with subsection 6.6 of the State Plan supplement, and individuals with disabilities who have been unserved or underserved by the vocational rehabilitation program;
  - C. as applicable, the plan of the state for establishing, developing or improving community rehabilitation programs;
  - D. strategies to improve the performance of the state with respect to the evaluation standards and performance indicators established pursuant to Section 106 of the Rehabilitation Act; and
  - E. strategies for assisting other components of the statewide work force investment system in assisting individuals with disabilities.
- 2. Attachment 4.11 (d) describes how the designated state agency uses these strategies to:
  - A. address the needs identified in the assessment conducted under paragraph 4.11(a) and achieve the goals and priorities identified in the State Plan attachments under paragraph 4.11(c);
  - B. support the innovation and expansion activities identified in subparagraph 4.12(a)(1) and (2) of the plan; and
  - C. overcome identified barriers relating to equitable access to and participation of individuals with disabilities in the State Vocational Rehabilitation Services Program and State Supported Employment Services Program.

**(e) Evaluation and reports of progress.**

- 1. The designated state unit and the State Rehabilitation Council, if the state unit has a council, jointly submits to the commissioner an annual report on the results of an evaluation of the effectiveness of the vocational rehabilitation program and the progress made in improving the effectiveness of the program from the previous year.
- 2. Attachment 4.11(e)(2):
  - A. provides an evaluation of the extent to which the goals identified in Attachment 4.11(c)(1) and, if applicable, Attachment 4.11(c)(3) were achieved;
  - B. identifies the strategies that contributed to the achievement of the goals and priorities;
  - C. describes the factors that impeded their achievement, to the extent they were not achieved;
  - D. assesses the performance of the state on the standards and indicators established pursuant to Section 106 of the Rehabilitation Act; and
  - E. provides a report consistent with paragraph 4.12(c) of the plan on how the funds reserved for innovation and expansion activities were utilized in the preceding year.

**4.12 Innovation and expansion. (Section 101(a)(18) of the Rehabilitation Act; 34 CFR 361.35)**

**(a) The designated state agency reserves and uses a portion of the funds allotted to the state under Section 110 of the Rehabilitation Act for the:**

- 1. development and implementation of innovative approaches to expand and improve the provision of vocational rehabilitation services to individuals with disabilities under this State Plan, particularly individuals with the most significant disabilities, consistent with the findings of the statewide assessment identified in Attachment 4.11(a) and goals and priorities of the state identified in Attachments 4.11(c)(1) and, if applicable, Attachment 4.11(c)(3); and

2. support of the funding for the State Rehabilitation Council, if the state has such a council, consistent with the resource plan prepared under Section 105(d)(1) of the Rehabilitation Act and 34 CFR 361.17(i), and the funding of the Statewide Independent Living Council, consistent with the resource plan prepared under Section 705(e)(1) of the Rehabilitation Act and 34 CFR 364.21(i).

- (b) Attachment 4.11 (d) describes how the reserved funds identified in subparagraph 4.12(a)(1) and (2) will be utilized.
- (c) Attachment 4.11(e)(2) describes how the reserved funds were utilized in the preceding year.

**4.13 Reports. (Section 101(a)(10) of the Rehabilitation Act; 34 CFR 361.40)**

- (a) The designated state unit submits reports in the form and level of detail and at the time required by the commissioner regarding applicants for and eligible individuals receiving services under the State Plan.
- (b) Information submitted in the reports provides a complete count, unless sampling techniques are used, of the applicants and eligible individuals in a manner that permits the greatest possible cross-classification of data and protects the confidentiality of the identity of each individual.

## **Preprint - Section 5: Administration of the Provision of Vocational Rehabilitation Services**

### **5.1 Information and referral services. (Sections 101(a)(5)(D) and (20) of the Rehabilitation Act; 34 CFR 361.37)**

The designated state agency has implemented an information and referral system that is adequate to ensure that individuals with disabilities, including individuals who do not meet the agency's order of selection criteria for receiving vocational rehabilitation services if the agency is operating on an order of selection, are provided accurate vocational rehabilitation information and guidance, including counseling and referral for job placement, using appropriate modes of communication, to assist such individuals in preparing for, securing, retaining or regaining employment, and are referred to other appropriate federal and state programs, including other components of the statewide work force investment system in the state.

### **5.2 Residency. (Section 101(a)(12) of the Rehabilitation Act; 34 CFR 361.42(c)(1))**

The designated state unit imposes no duration of residence requirement as part of determining an individual's eligibility for vocational rehabilitation services or that excludes from services under the plan any individual who is present in the state.

### **5.3 Ability to serve all eligible individuals; order of selection for services. (Sections 12(d) and 101(a)(5) of the Rehabilitation Act; 34 CFR 361.36)**

- (a) The designated state unit is able to provide the full range of services listed in Section 103(a) of the Rehabilitation Act and 34 CFR 361.48, as appropriate, to all eligible individuals with disabilities in the state who apply for services. Yes
- (b) If No:

1. Individuals with the most significant disabilities, in accordance with criteria established by the state, are selected first for vocational rehabilitation services before other individuals with disabilities.
2. Attachment 4.11(c)(3):
  - A. shows the order to be followed in selecting eligible individuals to be provided vocational rehabilitation services;
  - B. provides a justification for the order of selection; and
  - C. identifies the state's service and outcome goals and the time within which these goals may be achieved for individuals in each priority category within the order.
3. Eligible individuals who do not meet the order of selection criteria have access to the services provided through the designated state unit's information and referral system established under Section 101(a)(20) of the Rehabilitation Act, 34 CFR 361.37, and subsection 5.1 of this State Plan.

### **5.4 Availability of comparable services and benefits. (Sections 101(a)(8) and 103(a) of the Rehabilitation Act; 34 CFR 361.53)**

- (a) Prior to providing any vocational rehabilitation services, except those services identified in paragraph (b), to an eligible individual or to members of the individual's family, the state unit determines whether comparable services and benefits exist under any other program and whether those services and benefits are available to the individual.
- (b) The following services are exempt from a determination of the availability of comparable services and benefits:
1. assessment for determining eligibility and vocational rehabilitation needs by qualified personnel, including, if appropriate, an assessment by personnel skilled in rehabilitation technology;
  2. counseling and guidance, including information and support services to assist an individual in exercising informed choice consistent with the provisions of Section 102(d) of the Rehabilitation Act;
  3. referral and other services to secure needed services from other agencies, including other components of the statewide work force investment system, through agreements developed under Section 101(a)(11) of the Rehabilitation Act, if such services are not available under this State Plan;
  4. job-related services, including job search and placement assistance, job retention services, follow-up services, and follow-along services;
  5. rehabilitation technology, including telecommunications, sensory and other technological aids and devices; and
  6. post-employment services consisting of the services listed under subparagraphs (1) through (5) of this paragraph.
- (c) The requirements of paragraph (a) of this section do not apply if the determination of the availability of comparable services and benefits under any other program would interrupt or delay:
1. progress of the individual toward achieving the employment outcome identified in the individualized plan for employment;

2. an immediate job placement; or
3. provision of vocational rehabilitation services to any individual who is determined to be at extreme medical risk, based on medical evidence provided by an appropriate qualified medical professional.

(d) The governor in consultation with the designated state vocational rehabilitation agency and other appropriate agencies ensures that an interagency agreement or other mechanism for interagency coordination that meets the requirements of Section 101(a)(8)(B)(i)-(iv) of the Rehabilitation Act takes effect between the designated state unit and any appropriate public entity, including the state Medicaid program, a public institution of higher education, and a component of the statewide work force investment system to ensure the provision of the vocational rehabilitation services identified in Section 103(a) of the Rehabilitation Act and 34 CFR 361.48, other than the services identified in paragraph (b) of this section, that are included in the individualized plan for employment of an eligible individual, including the provision of those vocational rehabilitation services during the pendency of any dispute that may arise in the implementation of the interagency agreement or other mechanism for interagency coordination.

**5.5 Individualized plan for employment. (Section 101(a)(9) of the Rehabilitation Act; 34 CFR 361.45 and .46)**

- (a) An individualized plan for employment meeting the requirements of Section 102(b) of the Rehabilitation Act and 34 CFR 361.45 and .46 is developed and implemented in a timely manner for each individual determined to be eligible for vocational rehabilitation services, except if the state has implemented an order of selection, and is developed and implemented for each individual to whom the designated state unit is able to provide vocational rehabilitation services.
- (b) Services to an eligible individual are provided in accordance with the provisions of the individualized plan for employment.

**5.6 Opportunity to make informed choices regarding the selection of services and providers. (Sections 101(a)(19) and 102(d) of the Rehabilitation Act; 34 CFR 361.52)**

Applicants and eligible individuals or, as appropriate, their representatives are provided information and support services to assist in exercising informed choice throughout the rehabilitation process, consistent with the provisions of Section 102(d) of the Rehabilitation Act and 34 CFR 361.52.

**5.7 Services to American Indians. (Section 101(a)(13) of the Rehabilitation Act; 34 CFR 361.30)**

The designated state unit provides vocational rehabilitation services to American Indians who are individuals with disabilities residing in the state to the same extent as the designated state agency provides such services to other significant populations of individuals with disabilities residing in the state.

**5.8 Annual review of individuals in extended employment or other employment under special certificate provisions of the fair labor standards act of 1938. (Section 101(a)(14) of the Rehabilitation Act; 34 CFR 361.55)**

- (a) The designated state unit conducts an annual review and reevaluation of the status of each individual with a disability served under this State Plan:
  1. who has achieved an employment outcome in which the individual is compensated in accordance with Section 14(c) of the Fair Labor Standards Act (29 U.S.C. 214(c)); or
  2. whose record of services is closed while the individual is in extended employment on the basis that the individual is unable to achieve an employment outcome in an integrated setting or that the individual made an informed choice to remain in extended employment.
- (b) The designated state unit carries out the annual review and reevaluation for two years after the individual's record of services is closed (and thereafter if requested by the individual or, if appropriate, the individual's representative) to determine the interests, priorities and needs of the individual with respect to competitive employment or training for competitive employment.
- (c) The designated state unit makes maximum efforts, including the identification and provision of vocational rehabilitation services, reasonable accommodations and other necessary support services, to assist the individuals described in paragraph (a) in engaging in competitive employment.
- (d) The individual with a disability or, if appropriate, the individual's representative has input into the review and reevaluation and, through signed acknowledgement, attests that the review and reevaluation have been conducted.

**5.9 Use of Title I funds for construction of facilities. (Sections 101(a)(17) and 103(b)(2)(A) of the Rehabilitation Act; 34 CFR 361.49(a)(1), .61 and .62(b))**

If the state elects to construct, under special circumstances, facilities for community rehabilitation programs, the following requirements are met:

- (a) The federal share of the cost of construction for facilities for a fiscal year does not exceed an amount equal to 10 percent of the state's allotment under Section 110 of the Rehabilitation Act for that fiscal year.
- (b) The provisions of Section 306 of the Rehabilitation Act that were in effect prior to the enactment of the Rehabilitation Act Amendments of 1998 apply to such construction.

- (c) There is compliance with the requirements in 34 CFR 361.62(b) that ensure the use of the construction authority will not reduce the efforts of the designated state agency in providing other vocational rehabilitation services other than the establishment of facilities for community rehabilitation programs.

**5.10 Contracts and cooperative agreements. (Section 101(a)(24) of the Rehabilitation Act; 34 CFR 361.31 and .32)**

- (a) Contracts with for-profit organizations.

The designated state agency has the authority to enter into contracts with for-profit organizations for the purpose of providing, as vocational rehabilitation services, on-the-job training and related programs for individuals with disabilities under Part A of Title VI of the Rehabilitation Act, upon the determination by the designated state agency that for-profit organizations are better qualified to provide vocational rehabilitation services than nonprofit agencies and organizations.

- (b) Cooperative agreements with private nonprofit organizations.

Attachment 4.8(b)(3) describes the manner in which the designated state agency establishes cooperative agreements with private nonprofit vocational rehabilitation service providers.

## **Preprint - Section 6: Program Administration**

### **Section 6: Program Administration**

#### **6.1 Designated state agency. (Section 625(b)(1) of the Rehabilitation Act; 34 CFR 363.11(a))**

The designated state agency for vocational rehabilitation services identified in paragraph 1.2 of the Title I State Plan is the state agency designated to administer the State Supported Employment Services Program authorized under Title VI, Part B, of the Rehabilitation Act.

#### **6.2 Statewide assessment of supported employment services needs. (Section 625(b)(2) of the Rehabilitation Act; 34 CFR 363.11(b))**

Attachment 4.11(a) describes the results of the comprehensive, statewide needs assessment conducted under Section 101(a)(15)(a)(1) of the Rehabilitation Act and subparagraph 4.11(a)(1) of the Title I State Plan with respect to the rehabilitation needs of individuals with most significant disabilities and their need for supported employment services, including needs related to coordination.

#### **6.3 Quality, scope and extent of supported employment services. (Section 625(b)(3) of the Rehabilitation Act; 34 CFR 363.11(c) and .50(b)(2))**

Attachment 6.3 describes the quality, scope and extent of supported employment services to be provided to individuals with the most significant disabilities who are eligible to receive supported employment services. The description also addresses the timing of the transition to extended services to be provided by relevant state agencies, private nonprofit organizations or other sources following the cessation of supported employment service provided by the designated state agency.

#### **6.4 Goals and plans for distribution of Title VI, Part B, funds. (Section 625(b)(3) of the Rehabilitation Act; 34 CFR 363.11(d) and .20)**

Attachment 4.11(c)(4) identifies the state's goals and plans with respect to the distribution of funds received under Section 622 of the Rehabilitation Act.

#### **6.5 Evidence of collaboration with respect to supported employment services and extended services. (Sections 625(b)(4) and (5) of the Rehabilitation Act; 34 CFR 363.11(e))**

Attachment 4.8(b)(4) describes the efforts of the designated state agency to identify and make arrangements, including entering into cooperative agreements, with other state agencies and other appropriate entities to assist in the provision of supported employment services and other public or nonprofit agencies or organizations within the state, employers, natural supports, and other entities with respect to the provision of extended services.

#### **6.6 Minority outreach. (34 CFR 363.11(f))**

Attachment 4.11(d) includes a description of the designated state agency's outreach procedures for identifying and serving individuals with the most significant disabilities who are minorities.

#### **6.7 Reports. (Sections 625(b)(8) and 626 of the Rehabilitation Act; 34 CFR 363.11(h) and .52)**

The designated state agency submits reports in such form and in accordance with such procedures as the commissioner may require and collects the information required by Section 101(a)(10) of the Rehabilitation Act separately for individuals receiving supported employment services under Part B, of Title VI and individuals receiving supported employment services under Title I of the Rehabilitation Act.

## **Preprint - Section 7: Financial Administration**

### **7.1 Five percent limitation on administrative costs. (Section 625(b)(7) of the Rehabilitation Act; 34 CFR 363.11(g)(8))**

The designated state agency expends no more than five percent of the state's allotment under Section 622 of the Rehabilitation Act for administrative costs in carrying out the State Supported Employment Services Program.

### **7.2 Use of funds in providing services. (Sections 623 and 625(b)(6)(A) and (D) of the Rehabilitation Act; 34 CFR 363.6(c)(2)(iv), .11(g)(1) and (4))**

- (a) Funds made available under Title VI, Part B, of the Rehabilitation Act are used by the designated state agency only to provide supported employment services to individuals with the most significant disabilities who are eligible to receive such services.
- (b) Funds provided under Title VI, Part B, are used only to supplement and not supplant the funds provided under Title I, Part B, of the Rehabilitation Act, in providing supported employment services specified in the individualized plan for employment.
- (c) Funds provided under Part B of Title VI or Title I of the Rehabilitation Act are not used to provide extended services to individuals who are eligible under Part B of Title VI or Title I of the Rehabilitation Act.

## **Preprint - Section 8: Provision of Supported Employment Services**

### **8.1 Scope of supported employment services. (Sections 7(36) and 625(b)(6)(F) and (G) of the Rehabilitation Act; 34 CFR 361.5(b)(54), 363.11(g)(6) and (7))**

- (a) Supported employment services are those services as defined in Section 7(36) of the Rehabilitation Act and 34 CFR 361.5(b)(54).
- (b) To the extent job skills training is provided, the training is provided on-site.
- (c) Supported employment services include placement in an integrated setting for the maximum number of hours possible based on the unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice of individuals with the most significant disabilities.

### **8.2 Comprehensive assessments of individuals with significant disabilities. (Sections 7(2)(B) and 625(b)(6)(B); 34 CFR 361.5(b)(6)(ii) and 363.11(g)(2))**

The comprehensive assessment of individuals with significant disabilities conducted under Section 102(b)(1) of the Rehabilitation Act and funded under Title I of the Rehabilitation Act includes consideration of supported employment as an appropriate employment outcome.

### **8.3 Individualized plan for employment. (Sections 102(b)(3)(F) and 625(b)(6)(C) and (E) of the Rehabilitation Act; 34 CFR 361.46(b) and 363.11(g)(3) and (5))**

- (a) An individualized plan for employment that meets the requirements of Section 102(b) of the Rehabilitation Act and 34 CFR 361.45 and .46 is developed and updated using funds under Title I.
- (b) The individualized plan for employment:
  - 1. specifies the supported employment services to be provided;
  - 2. describes the expected extended services needed; and
  - 3. identifies the source of extended services, including natural supports, or, to the extent that it is not possible to identify the source of extended services at the time the individualized plan for employment plan is developed, a statement describing the basis for concluding that there is a reasonable expectation that sources will become available.
- (c) Services provided under an individualized plan for employment are coordinated with services provided under other individualized plans established under other federal or state programs.

## Attachment 4.2(c) Input of State Rehabilitation Council

Required annually by all agencies except those agencies that are independent consumer-controlled commissions.

Identify the Input provided by the state rehabilitation council, including recommendations from the council's annual report, the review and analysis of consumer satisfaction, and other council reports. Be sure to also include:

- the Designated state unit's response to the input and recommendations; and
- explanations for the designated state unit's rejection of any input or recommendation of the council.

### Input from Montana Vocational Rehabilitation Council

The Montana Vocational Rehabilitation Council advises and works with the Vocational Rehabilitation Program to improve policies, programs, delivery of services to consumers, and methods for reaching potential consumers and employers. The Montana Vocational Rehabilitation Council (Council) provides input and advice to Montana Vocational Rehabilitation (MVR) in accordance with the Rehabilitation Act. The Council holds meetings quarterly. These meetings are accessible and open to the public and are held in various locations statewide. Policy and program issues are discussed at both the Council meetings and the committee meetings. Council members are invited and do participate with the MVR management staff to help develop the strategic plan and determine the agency's priorities. On April 13, 2011, the Council discussed issues to be included in the state plan. The Council's discussion focused on objectives recommended for inclusion in the plan. In some cases, the Council also suggested possible activities or performance measures for the objective. The following is a summary of specific input and recommendations from the Council:

1. MVR will develop a strong collaborative relationship with the Veterans Administration's Vocational Rehabilitation Services to effectively and proactively be prepared to serve the growing community of Montana veterans in need of vocational rehabilitation services. A possible performance measure of this objective could be:

- The two agencies will complete a memorandum of understanding (MOU) that would formalize agreement on issues such as: (specifics to be determined).

MVR Response: This recommendation is incorporated into Objective 1.3. of the strategic plan. The Veteran's Administration is an agency that MVR will develop a partnership and an MOU.

2. There will be an increased understanding of the transitions process by MVR's staff. Possible activities to support this objective could be:

- Provide in-service training to MVR counselors on the legal responsibilities of schools and other service agencies related to transition age consumers.
- Conduct analysis of the pilot program in transitions: \_\_\_\_\_1. To determine the impact a potential best practices. \_\_\_\_\_2. To explore options for expanding elements of the program to other parts of the state.

MVR response: This recommendation is incorporated into Objective 2.3 and Strategy 2 of Objective 1.2 of the strategic plan. Objective 2.3 stresses evaluation of transitions procedures and developing more effective procedures, and the Strategy 2 of Objective 1.2 emphasizes the need to have training to support counselors in carrying out appropriate policy and practices.

3. MVR will increase the public understanding of MVR and the services provided by the agency. Because of the employment focus of MVR services, these efforts need to include outreach to businesses and employers.

MVR response: While the strategic plan does not emphasize increasing the general public's understanding of MVR, it does stress increased understanding of MVR by key agencies in Objective 1.3. Because key agencies have contact with potential MVR consumers it is important that those agencies have good communications and procedures in place to make appropriate referrals to MVR. MVR is committed to continuing to work with the Council on public relations and that commitment will not diminish. However, during the strategic planning process, there was a realization that not all issues can be included within the final plan and there was an effective process in place that would continue the efforts in this regard without the issue being specified in the plan. One specific initiative that MVR is exploring related to public understanding is to work collaboratively with DPHHS on social networking tools on the internet.

4. MVR will develop a process for identifying populations that are unserved and underserved by the agency. A possible activity to support this objective could be:

- Develop a method with the Department of Corrections to determine incidence of persons with disabilities leaving prisons.

A possible performance measure of this objective could be:

- A specific procedure will be in place to compare incidence rates of specific populations of persons with disabilities with incidence rates of same populations in MVR services.

MVR response: This recommendation is included in Objective 2.1 of the strategic plan. The issue related to the Department of Corrections is dealt with in Objective 1.3

5. MVR staff will be professionally trained and have an up-to-date understanding of issues impacting their work with persons with disabilities seeking employment.

MVR response: This recommendation was dealt with in Strategy 2 of Objective 1.2. However, In developing the strategic plan, it was felt that training was a key strategy overall that would be involved in meeting almost all of the objectives.

6. MVR will improve staff retention.

MVR response: This recommendation was the focus of Goal 1 of the strategic plan; however it was particularly emphasized in Objective 1.2.

7. MVR will increase accessibility to services in rural areas.

MVR response: This recommendation is reflected in strategies 3 and 5 of Objective 2.1 of the plan.

8. Because of the mutual priorities of independence and employment of persons with disabilities, MVR should reaffirm their relationship with the Statewide Independent Living Council and Centers for Independent Living in order to increase collaboration and facilitate continued growth of both vocational rehabilitation and independent living in Montana.

MVR Response: Evidence of the vocational rehabilitation and independent living collaboration includes Disability Transitions Programs contracting with Centers for Independent Living to assess Disability Transitions Programs facilities and programs for compliance with the Americans with Disabilities Act and Section 504 of the Rehabilitation Act (Objective 1.4 Strategy 1.) Another example is that the Disability Transitions Programs administrator routinely attends meetings and events of the Statewide Independent Living Council where he reports and participates on equal footing with those involved in independent living. Future activities include cross training between vocational rehabilitation and independent living staff members and identification of barriers to collaboration. To identify the barriers, the Disability, Employment, Independence, and Transitions' Independent Living Specialist will query vocational rehabilitation and independent living staff members about problems and opportunities in the nexus of vocational rehabilitation and independent living services.

This screen was last updated on Jun 28 2011 4:06PM by Michael Hermanson

## **Attachment 4.7(b)(3) Request for Waiver of Statewidness**

Identify the types of services to be provided by the program for which the waiver of statewidness is requested.

The waiver request should also include:

- a written assurance from the local public agency that it will make available to the designated state unit the non-federal share of funds;
- a written assurance that designated state unit approval will be obtained for each proposed service before it is put into effect;
- a written assurance that all state plan requirements will apply to all services approved under the waiver.

**This agency has not requested a waiver of statewidness.**

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## Attachment 4.8(b)(1) Cooperative Agreements with Agencies Not Carrying Out Activities Under the Statewide Workforce Investment System

Describe interagency cooperation with and utilization of the services and facilities of agencies and programs that are not carrying out activities through the statewide workforce investment system with respect to

- Federal, state, and local agencies and programs;
- if applicable, Programs carried out by the Under Secretary for Rural Development of the United States Department of Agriculture; and
- if applicable, state use contracting programs.

Cooperation, collaboration, and coordination with agencies not in the statewide workforce investment system are usually expressed through cooperative agreements or MOUs. MVR presently has agreements with the following entities:

Section 121 Vocational Rehabilitation Projects located in Montana

Mental Health Developmental Disabilities

Program Montana Small Business

Development Centers (SBDC)

The Commissioner of Higher Education

Office of Public Instruction

Section 121 Vocational Rehabilitation Projects.

MVR presently has cooperative agreements with all of the six Section 121 projects (Flathead Reservation, Fort Belknap Reservation, Fort Peck Reservation, Rocky Boy's Reservation, Northern Cheyenne Reservation and the Blackfeet Reservation) located in Montana. The purpose of these agreements is to establish procedures to assure continued coordination between the 121 projects and MVR. These agreements are implemented for the sole purpose of enhancing, to the greatest extent possible, the delivery of rehabilitation services to persons with disabilities living in the state of Montana and residing on or near the six reservations that currently have a tribal vocational rehabilitation project.

Mental Health This cooperative agreement has provisions that include:

1. To make available the required supported employment/follow-along services from MVR's Community Rehabilitation Programs certified mental health providers. Follow-along services may be provided through Community Based Psychiatric Rehabilitation and Support, and through Case Management services.
2. To serve persons identified as eligible for mental health service under Medicaid or the Mental Health Service Plan.
3. To strengthen supported employment services to Montana citizens eligible for vocational rehabilitation's supported employment services and for community mental health services funded by the Addictive and Mental Disorders Division.
4. To provide cross-training and technical assistance between our agencies.
5. To establish and evaluate annual goals for our interagency work towards coordinated vocational and support services.

Developmental Disabilities Program (DDP) This cooperative agreement has provisions that include:

1. To strengthen supported employment services to Montana citizens eligible for vocational rehabilitation's supported employment services and who receive services through the Developmental Disability (DD) provider organizations.
2. To contract with developmental disability provider organizations to provide adult sheltered and supported employment work services through funds made available to them from the state general fund and Medicaid home and community waiver.
3. To make available the required supported employment, extended/follow along services from MVR's community rehabilitation program's enrolled DD providers. Long-term follow-along services are made available by DD provider organizations through a long-term sign off cooperative agreement with MVR. This sign off is between the provider organization and MVR. It is incumbent upon DD provider organizations to negotiate and secure any approving authority from the DDP. MVR agrees DD provider organizations will provide copies of the long-term, follow-along sign off cooperative agreement documents to the DDP regional managers. The DD provider organization's sign off commits the provider to making available this service, but does not commit funds. In terms of funding source and availability, DDP resource commitments are made between DDP regional managers and provider organizations.
4. For those residing in the Montana Developmental Center (MDC) who have been identified as being in need of vocational/supported employment services, those needs must be included in the community placement plan. The costs for long-term follow-along need to be included in the resources allocated, and need to be made available to reimburse an enrolled provider for long-term follow-along services after discharge from MDC. Montana Small Business Development Centers (SBDCs) The purpose of this agreement is to establish guidelines and procedures to be used by the Montana Small Business Development Centers (SBDC) and the MVR Program in coordinating the services of both programs on behalf of individuals with disabilities who desire to pursue the goal of self-employment. This agreement outlines each party's role and responsibilities, referral procedures, information exchange methods, forms used, and implementation, evaluation, amendments and termination procedures. Business Enterprise Program (BEP)

The Montana Business Enterprise Program has three active and one unplaced vendor. No new consumers received training during the past year. The program expanded to include cafeterias in state buildings in addition to the one on a federal site. Legislation passed that allowed the Business Enterprise Program to establish vending at rest stops along Montana interstates.

Department of Agriculture There is no Department of Agriculture project related to disabilities serving Montana at this time.

State Use Contracting Programs Montana state agencies may purchase supplies and services from sheltered workshops or work activity centers. Such purchases are exempt from competitive bidding laws and rules. The Montana Department of Administration maintains a list of certified sheltered workshops or work activity centers located in the state. The list includes the supplies and services provided by each sheltered workshop or work activity center.

Cooperation in Training Activities MVR routinely collaborates with other organizations to provide training opportunities for MVR staff. The following is a list of collaborating organizations: University of Montana - Rural Institute on Disabilities Montana State University - Billings Montana Center on Disabilities TACE Programs Utah State University Montana Youth Leadership Program (MYLF) Centers for Independent Living Brain Injury Association of Montana Client Assistance Program Montana Addictive and Mental Disorders Division Developmental Disabilities Program Disability Determination Services Social Security Rocky Mountain Rehab Western Washington University MAXIMUS – Ticket to Work Training

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## Attachment 4.8(b)(2) Coordination with Education Officials

- Describe the designated state unit's plans, policies, and procedures for coordination with education officials to facilitate the transition of students with disabilities from school to the receipt of vocational rehabilitation services, including provisions for the development and approval of an individualized plan for employment before each student determined to be eligible for vocational rehabilitation services leaves the school setting or, if the designated state unit is operating on an order of selection, before each eligible student able to be served under the order leaves the school setting.
- Provide information on the formal interagency agreement with the state educational agency with respect to
  - consultation and technical assistance to assist educational agencies in planning for the transition of students with disabilities from school to post-school activities, including VR services;
  - transition planning by personnel of the designated state agency and educational agency that facilitates the development and completion of their individualized education programs;
  - roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining state lead agencies and qualified personnel responsible for transition services;
  - procedures for outreach to and identification of students with disabilities who need transition services.

### Office of Public Instruction

This cooperative agreement has provisions that include:

Memorandum of Understanding (MOU) between MVR and the Office of Public Instruction (OPI)

Purpose:

The purpose of this MOU is to enhance the working relationship between the above mentioned parties to provide more effective services to individuals with disabilities in compliance with the Individuals with Disabilities Education Act (IDEA), 20 U.S.C., 1485 and the Rehabilitation Act of 1973, 29 U.S.C. as amended. Within this agreement are strategies for the two agencies to work collaboratively in evaluating, serving and planning for a seamless transition from school for students eligible for MVR services, as they make the transition from school to adult education, integrated employment (including supported employment), continuing and adult education, independent living and community participation.

Joint Responsibility for Training:

The OPI and MVR shall jointly sponsor training for their respective staff members and Local Education Agency (LEA) personnel. The training shall focus on requirements of federal and state law concerning education of individuals with disabilities, their transition from school to employment, vocational rehabilitation services, assistive technology, and the substance of this MOU.

Responsibilities of the OPI:

1. Inform - The OPI shall assist school districts to inform MVR of students with disabilities who are on an IEP and may be in need of services through MVR. The notice to MVR shall occur no later than six (6) months prior to the student's 16th birthday in order for MVR to participate in the future development of the student's IEP. For students enrolling closer to graduation or age twenty one (21), school districts are urged to inform MVR as soon as those students are identified.

2. Necessary Lead Time - Eligibility Determinations - For the first IEP meeting following the initial notice to MVR, the OPI shall encourage school districts to inform MVR of the meeting at least two months in advance to allow sufficient time for MVR to acquire the necessary diagnostic data to determine the student's MVR eligibility. The notice to MVR should include an invitation to the MVR counselor to participate, from then on, in transition planning within the IEP process.

3. Necessary Lead Time - IEP's - For all IEP meetings subsequent to the first meeting in (i), the OPI shall encourage school districts to schedule IEP meetings for eligible students with disabilities one month in advance if at all possible, and to include notice to MVR and the invitation for the MVR Counselor to participate. Development of vocational goals and objectives shall occur in collaboration with the student, parents and appropriate professionals.

4. Referrals of Students with Disabilities not on an IEP - The OPI shall assist local school districts with referrals of students with disabilities who are not on an IEP and may be in need of services through MVR. The notice to MVR should occur at least one year before their anticipated graduation dates.

5. Technical Assistance - The OPI shall provide technical assistance to local school districts concerning the provision of free, appropriate, public education, including the responsibility to provide assistive technology to assist with the education of students approaching transition to independent living and employment as appropriate.

6. Monitoring Data for MVR -The OPI shall provide to MVR the data it collects from school districts regarding the number of special education students they are serving. Data provided to MVR will only be transferred if the release of the data is consistent with the requirements of the Family Education Rights and Privacy Act (FERPA).

7. Related Services - The OPI shall assist local school districts with coordination of vocationally related services with MVR for eligible students. Coordination should commence in the early stages of transition. Vocationally related service coordination and corresponding agency responsibilities should be identified in the IEP and included on the student's IPE when appropriate.

8. Outreach and Identification - The OPI shall assist the local school districts with methods and procedures for outreach and identification of students and families in need of transition services. Assistance with the methods and procedures should include actions needed to engage those who are not aware of MVR services, including how the school districts identify and work with transition aged students who may be in alternative high schools or are incarcerated.

#### Responsibilities of MVR:

1. Consultation - The MVR counselor shall assist school districts in planning for the transition of students with disabilities from school to post school activities. The MVR counselor shall act as a consultant for the student, parents and the school district during IEP/transition meetings that are scheduled before MVR has an open case on the student. When requested by the local school district, MVR shall ensure that the MVR counselors/staff participate in the evaluation process of students who have applied for MVR services, and in the development of the IEP's for eligible students.

2. Former Students - MVR shall encourage former students who are still eligible for IDEA services to enroll again in school for further study and training to enhance their opportunities for employment. Such former students shall also be eligible for MVR services customarily provided by MVR to adults over the age of 21.

3. Assistive Technology - When required as part of the transitioning student's IPE, MVR will provide assistive technology services after the individual leaves the school district.

4. Related Services - (Vocational) After the eligible individual leaves the local school district, MVR will continue to provide vocational services, i.e., vocational assessments, career

exploration, job shadowing, vocational guidance and counseling and other required services as documented in the IPE.

5. Transitions Program Manager - MVR's transitions program manager shall coordinate with Montana OPI Transitions Specialists to develop and promote a seamless transition system. MVR also has a full time Transitions Program Manager in the Missoula District who will schedule office hours at the high schools and will be available to offer consultation to special education and 504 coordinators, teachers, school administration, parents, advocacy groups and others regarding the role of MVR in the transition process. The MVR transitions program manager shall meet with staff and other interested parties in other school districts as invited to share best practices and facilitate communication between the parties. MVR staff will also be available to provide information on changes in the law or MVR policy regarding transitions services.

#### Financial Responsibilities:

Local school districts are financially responsible for the costs of services they are mandated to provide under the IDEA, and MVR is responsible for costs of services it provides under the Rehabilitation Act. Should a service be necessary that neither party is mandated to provide, consultation will occur between the programs and services. Payment(s) will be based on the needs of the student, the availability of funds, and which agency is best positioned to provide the particular service at the time.

#### Dispute Resolution as to Financial Responsibilities between Local District and MVR:

Should a service be necessary that neither the local school district nor MVR is mandated to provide or there is a dispute as to which entity is responsible to provide the service, consultation will occur between the entities. Services or payments will be based on the needs of the student, availability of funds, and which agency is best positioned to provide the particular service at the time. Should the local school district and the MVR be unable to resolve the dispute after consultation with one another, the Dispute Resolution Procedures outlined in the Interagency Agreement between DPHHS and the OPI shall apply.

#### MOU Office of the Commissioner of Higher Education (OCHE)

The purpose of this MOU is to develop and adopt principles which will guide the planning and delivery of support services to individuals with disabilities who are mutual clients of MVR and students enrolled in the Montana University System (MUS).

This MOU has provisions which include:

1. MVR and the units of the MUS maintain different requirements for determination of eligibility, documentation of disability, and the provision of services or accommodations. This MOU does not require either MVR or MUS to alter its policies for providing services or supports, and this MOU is not to be used as a basis for determining eligibility for MVR or MUS services.
2. The units of the MUS through the guidance of the OCHE are required to provide services and accommodations to MVR clients to the same extent as they are provided to other students with disabilities, in accordance with Montana state law, the Americans with Disabilities Act of 1990 (PL 101-336) and Section 504 of the Rehabilitation Act (PL 93-112, as amended).

3. MVR is not prohibited in this agreement from contracting with units of the MUS to provide services or support for MVR clients beyond those required to assure equal access to equal educational opportunities.

4. The MOU will provide both parties with the opportunity to enhance communication and the exchange of information regarding services offered by MVR and the various campuses of the MUS.

5. MVR and the units of the MUS will work together to enhance cross-referrals of individuals with disabilities, as appropriate to each individual's needs. Personal information about the individual will not be shared without an appropriate release of information.

6. The MUS will not require students who have a disability to apply for MVR funding before providing services or support. For students who have applied for MVR services, the MUS will not deny or delay the provision of services or support while MVR is in the process of determining eligibility for services.

7. MVR services are provided pursuant to an individualized plan for employment (IPE) which is developed jointly by the rehabilitation counselor and the eligible individual. In those situations where referral has been made to campus disability support services, the appropriate disability services staff may also be involved in helping to develop the IPE.

8. The MVR rehabilitation counselor and the MUS campus disability support services staff will respect the individual's right and responsibility to fully participate in all decisions regarding his or her vocational future. The IPE shall be developed and implemented in a manner that allows the individual an opportunity to exercise informed choice in selecting an employment outcome, the specific vocational rehabilitation services that are to be provided, the entity that will provide those services, and the methods that will be used to procure the vocational rehabilitation services.

9. MVR clients who attend a unit of the MUS may need reasonable accommodation, including auxiliary aids or services in order to have equal access to the programs and services offered at that particular institution.

10. The provision and cost of reasonable accommodations are the responsibility of the particular unit of the MUS. For individuals with disabilities who are mutual clients of MVR and students at a unit of MUS, and are otherwise qualified for such aids or services, the funding source for auxiliary aids and services will be determined on an individual case-by-case basis.

11. Additional guidelines relative to interpreter services for eligible clients/students:

A. The MUS unit will be responsible for procuring and paying interpreters. MVR will reimburse for its share of the cost.

B. The MUS unit will provide the appropriate MVR office with an estimate of the number of hours and cost of interpreter services which will be billed to MVR prior to the start of services.

C. The MVR office must authorize payment for the interpreter services prior to the start of services.

D. MVR and the MUS unit will require full compliance with the Registry of interpreters for the Deaf (RID) Code of Professional Conduct.

In the last year this MOU was updated to include the following points:

- Physical disabilities were included in the agreement to split evenly the cost of auxiliary aids and services.

- Pre approval of any cost sharing agreements needed to be obtained prior to the start of the service.
- Documentation of services provided must be provided to MVR/BLVS that meets or exceeds state auditing requirements.

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### **Attachment 4.8(b)(3) Cooperative Agreements with Private Nonprofit Organizations**

Describe the manner in which the designated state agency establishes cooperative agreements with private non-profit vocational rehabilitation service providers.

The designated state unit does not have formal cooperative agreements with our private non-profit providers of vocational rehabilitation services in Montana. Rather, MVR operates on a purchase-of-service basis and we have identified private non-profit rehabilitation providers who meet qualification standards established by the designated state unit and who provide services on a purchase-of-service basis to our clients.

MVR staff meets with this provider group regularly to talk about fee structures, services provided, and to discuss outcome measurements and consumer satisfaction for each of these entities. Because these are individualized purchase-of-services, there is no formal cooperative agreement.

The majority of services purchased by MVR from Community Rehabilitation Programs (CRP) are directly from the vocational rehabilitation counselor utilizing an authorization process. The amount of services purchased depends upon the amount and type of services needed by a consumer. Agencies eligible to receive authorizations must be approved vendors and must be current service providers of the Department, have Commission on Accreditation of Rehabilitation Facilities (CARF) or Rehabilitation Services Accreditation System (RSAS) accreditation. In a limited number of cases, individuals with appropriate backgrounds are authorized to provide services in remote rural areas where a Department, RSAS or CARF provider is not available.

A new fee structure was implemented July 2008. MVR will no longer utilize the audit-based, cost reimbursement system at that time.

In the last year, each active CRP was allocated funds to be used for staff training. By improving the skills of CRP staff, services to RSA consumers will be improved. American Recovery and Reinvestment Act (ARRA) funds were utilized for this activity as an improvement in the overall CRP infrastructure, which should provide benefits beyond the timeframe of the ARRA funding. The CRP have used the funds in a variety of trainings. The funds are only available until August 1, 2011.

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## Attachment 4.8(b)(4) Arrangements and Cooperative Agreements for the Provision of Supported Employment Services

Describe the efforts of the designated state agency to identify and make arrangements, including entering into cooperative agreements, with other state agencies and other appropriate entities in order to provide the following services to individuals with the most significant disabilities:

- supported employment services; and
- extended services.

In Montana, supported employment is for individuals with the most significant disabilities who require support services (job finding, job placement and job coaching) geared to help the individual secure competitive employment in an integrated employment setting. MVR works closely with state agencies and other organizations with regard to providing supported employment and extended support services for individuals with the most significant disabilities. Mental Health: MVR has a negotiated cooperative agreement with the Addictive & Mental Disorders Division. The cooperative agreement provides for:

cross-training and technical assistance between our agencies,  
establishment and evaluation of annual goals for interagency work towards coordinated vocational and support services,  
and to make available the required supported employment/ extended support / follow-along services from MVR's Community Rehabilitation Programs certified mental health providers.

Developmental Disabilities Program: MVR has had a long and productive relationship with the Developmental Disabilities Program (DDP), and that program continues to sign off for extended support services for persons with significant disabilities. MVR and DDP are located in the same department, and communication between the two programs is excellent. The cooperative agreement provides for:

cross-training and technical assistance between our agencies to make available the required supported employment,  
extended/follow along services from MVR's Community Rehabilitation Programs enrolled DD providers,  
and for DDP to be responsible for contracting with developmental disability provider organizations to provide adult supported employment work services through funds made available to them from the state general fund and the Medicaid home and community waiver.

Certified Community Rehabilitation Programs: MVR works with a number of community based organizations across the state. Twenty-one of these organizations are certified as extended support service providers to assure quality in service delivery for our consumers. MVR has certified programs in the mental health arena as well as the developmental disabilities arena to provide these services at the local level. MVR works with the Community Medical Center WORC Center to provide extended services to persons who suffer from traumatic brain injury.

Extended Support Services: The extended support service program is the state of Montana's funding source that makes long-term support services available to individuals as they work in

either a sheltered or community-based employment setting. The legislature kept level funding for this program, which was a success given the cuts made to other state funded programs because of the economic downturn. The extended support service program is administered and managed by Rocky Mountain Rehab, p.c. (RMR) of Billings, Montana, through a contract with the Department of Public Health and Human Services, Disability, Employment, Independence, and Transitions.

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## Attachment 4.10 Comprehensive System of Personnel Development

### Data System on Personnel and Personnel Development

1. Describe the development and maintenance of a system for collecting and analyzing on an annual basis data on qualified personnel needs with respect to:

- the number of personnel who are employed by the state agency in the provision of vocational rehabilitation services in relation to the number of individuals served, broken down by personnel category;
- the number of personnel currently needed by the state agency to provide vocational rehabilitation services, broken down by personnel category; and
- projections of the number of personnel, broken down by personnel category, who will be needed by the state agency to provide vocational rehabilitation services in the state in 5 years based on projections of the number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.

#### Data System

Comprehensive System for Personnel Development (CSPD) information is managed by the MVR trainer who keeps track of trainings offered, staff attending training, CRC credit, and CSPD information.

Montana VR Staffing by Type of Staff (data from RSA2)

Administrative: 2005 - 7, 2006 - 5, 2007 - 6, 2008 - 6, 2009 - 6, 2010 - 6

Counselor: .....2005 - 37, 2006 - 37, 2007 - 37, 2008 - 38, 2009 - 38, 2010 - 37

Support Staff: ..2005 - 40, 2006 - 40, 2007 - 40, 2008 - 41, 2009 - 40, 2010 - 40

Total Staff .....2005 - 84, 2006 - 82, 2007 - 83, 2008 - 85, 2009 - 84, 2010 - 83

NOTE: The RSA2 looks at positions and what part of the year they are filled. It is not the same as the number of bodies or the numbers of FTE.

Looking at budgeted personnel, MVR employs 40.55 FTE counselors, four rehabilitation teachers, four orientation and mobility instructors, and five regional administrators. These are the only staff that require certification or a CSPD plan. In FY 2010, MVR served 8,508 Montanans with disabilities, which means that each counselor FTE served 210 consumers. The population in western Montana continues to grow, while the population in eastern Montana decreases. Unfortunately, there is not a "pocket" where the decline is large enough to take away a counselor. Montana has such large travel distances for counselors to meet with consumers that this is not possible. During July 2011, MVR will hire an additional counselor to be housed in the Kalispell office. This office serves one of the fastest population growth areas of the state.

When all the positions are filled, MVR has enough staff to provide vocational rehabilitation services to the state. In the next five years, MVR will continue to investigate the feasibility of increased counselor staffing to meet the transitions needs of Montana's youth with disabilities. MVR would like to see a transitions counselor in each of its four regional offices. Of course, population growth and client demographics will be closely monitored. If our counseling staff increases, it is possible that additional support staff would also be necessary. Also, MVR is experiencing significant turnover in upper management positions, including the state director, and several regional administrators. MVR has been anticipating this turnover and is addressing it through the Futures Group, which is discussed elsewhere in this plan. This will create a need for hiring more counselors as employees are promoted through the system. In addition, normal staff turnover means that new staff will need to be hired each year.

Row	Job Title	Total positions	Current vacancies	Projected vacancies over the next 5 years
1	Administrator	1	0	0
2	Bureau Chiefs	2	0	0
3	Program Managers	3	1	0
4	Central Office Administrative Support Staff	3	0	1
5	VR Counselors Total individuals - not FTE	49	6	15
6	Orientation and Mobility Specialists	4	0	1
7	Rehabilitation Teachers	4	1	1
8	Field Support Staff	27	1	8
9	Technical Support Staff	4	0	1
10				

2. Describe the development and maintenance of a system for collecting and analyzing on an annual basis data on personnel development with respect to:

- a list of the institutions of higher education in the state that are preparing vocational rehabilitation professionals, by type of program;
- the number of students enrolled at each of those institutions, broken down by type of program; and
- the number of students who graduated during the prior year from each of those institutions with certification or licensure, or with the credentials for certification or licensure, broken down by the personnel category for which they have received, or have the credentials to receive, certification or licensure.

MVR continues to review, on a yearly basis, the reported training needs of its entire staff. This is part of our overall maintenance of the comprehensive system for personnel development. Of particular concern to MVR is the implementation of a system of personnel development that will ensure an adequate supply of qualified rehabilitation personnel for the designated state unit.

Montana's Vocational Rehabilitation Council has had an opportunity to review and make comments on the development of the plans and policies regarding qualified personnel.

Currently Montana has identified 98%, of its professional counseling and supervisory staff as Certified Rehabilitation Counselors (CRC), qualified to sit for the CRC, or under a CSPD Plan (including actively researching graduate schools). At this time there are four counselors taking graduate classes and six additional counselors applying to or researching graduate schools. MVR also has six vacant counselor positions, and some of them may require graduate school also.

Montana's personnel policy has been rewritten so applicants who have achieved the CRC status receive a higher priority for hiring than those without it. In addition, Montana vigorously recruits for master's level degrees in rehabilitation counseling when there are vacancies. MVR has a good working relationship with the Rehabilitation Counseling Graduate Programs at Montana State University - Billings and Utah State University. Both of these institutions have sought input from MVR related to curriculum development and how best to prepare students to work in the

public VR program. MVR has successfully recruited and hired graduates of these two programs, who were well prepared to sit for the CRC examination.

MVR also tracks the current enrollment of MVR staff in the following educational programs: the Master of Rehabilitation Counseling (MRC) program through the Distance Education Program at Utah State University (USU) in Logan, Utah (one staff), and the Master of Science in Rehabilitation Counseling (MS Rehabilitation Counseling) program at Montana State University (MSU) in Billings, Montana. USU graduates 25 to 30 individuals per year in their MVR program, and MSU-Billings graduates approximately 12 individuals per year in their MS Rehabilitation Counseling program.

Row	Institutions	Students enrolled	Employees sponsored by agency and/or RSA	Graduates sponsored by agency and/or RSA	Graduates from the previous year
1	Utah State University	1	1		1
2	West Virginia University	2	2	0	0
3	University of Wisconsin - Stout	1	0	0	0
4	Montana State University - Billings	0	0	1	1
5					

### Plan for Recruitment, Preparation and Retention of Qualified Personnel

Describe the development (updated on an annual basis) and implementation of a plan to address the current and projected needs for qualified personnel including, the Coordination and facilitation of efforts between the designated state unit and institutions of higher education and professional associations to recruit, prepare, and retain personnel who are qualified, including personnel from minority backgrounds and personnel who are individuals with disabilities.

#### Recruitment and Retention

During state fiscal year 2011, turnover of rehabilitation counselors in Montana has been high. MVR has had to advertise for 18 counselors or counselor supervisors. Of those 18 vacancies, 12 were for good reasons: 3 retirements, 6 promotions, 2 lateral moves requested by the counselor, and 1 new counselor position. It is important to note that just one retirement at the regional administrator level results in a total of three vacancies as people are promoted. As a result of the high turnover, MVR has not been able to hire CRCs for all the positions. Currently 10 staff need graduate level training. In addition, MVR currently has six vacant counselor positions that may also require graduate level training. MVR will continue to recruit the highest quality staff available. MVR projects turnover will start to decline, with some difficulty recruiting master degree level rehabilitation counselors in some regions of the state. Individuals coming to MVR without a masters degree in rehabilitation counseling will be hired on the condition that they will develop a CSPD Plan to meet the standard.

Through the extensive efforts of the Blind and Low Vision Services staff and the HR staff within the department, MVR can sometimes attract candidates from across the country for

Rehabilitation Teachers and Orientation and Mobility Specialists. In other cases, MVR must hire someone locally on a training assignment and pay for their schooling.

Montana has no state university training for either Rehabilitation Teaching or Orientation and Mobility, and therefore, attracting highly qualified professionals in these areas will continue to be a problem for MVR. In an effort to address this dilemma, training positions have been developed.

MVR maintains contact with Montana State University-Billings to update them on the MVR Program. The agency gathers information on degree requirements, and works with rehabilitation counseling instructors to ensure that university requirements are compatible with those needed to qualify counselors to effectively and efficiently serve people with significant disabilities who are eligible for vocational rehabilitation services. MVR works with Montana colleges to recruit individuals from minority backgrounds and persons with significant disabilities. MVR takes affirmative action to employ and advance in employment, qualified individuals with significant disabilities.

In Montana, Native Americans make up the largest minority population. Six Native American Section 121 projects are located on reservations and employ Native Americans as rehabilitation counselors. However, with the new CSPD standard requiring education at the graduate level, the general MVR program has difficulty recruiting qualified Native Americans for employment within the agency.

By developing a plan to assure adequate numbers of CRC counselors and by providing leadership training at all levels, MVR is working to develop future leaders who will be ready to take over key positions as they are vacated. Towards this effort, MVR has formed a leadership council that will work directly with current MVR management staff in the design and implementation of the process and format for case services to consumers. Staff participating on this leadership council, referred to as the MVR Futures Group, will obtain the skills necessary to take MVR into the future.

The MVR Futures Group is composed of current staff who have been successfully employed by the agency for a minimum of two years, have completed specific prerequisite training in supervision and/or management and who are or have been, enrolled in approved leadership training, as finances allow.

Participation in the MVR Futures Group involves a competitive application process and involves a three-year term for staff members and two-year term for the regional administrator. Successful completion of a three-year term in the MVR Futures Group has a proposed equivalency of two years of management experience within MVR. Allowing staff to participate in real-life problem solving and real-life improvements to our current service delivery system serves the agency well and provides a mechanism for honing the skills of future leaders within the agency.

MVR also works closely with TACE programs to provide in-service training to our staff. Presently, staff members are taking advantage of regularly offered videoconference training on a variety of pertinent topics. In addition in FY 2011, ARRA funds were used to provide more training opportunities to staff.

## **Personnel Standards**

Describe the state agency's policies and procedures for the establishment and maintenance of personnel standards to ensure that designated state unit professional and paraprofessional personnel are adequately trained and prepared, including:

1. standards that are consistent with any national or state-approved or -recognized certification, licensing, registration, or, in the absence of these requirements, other comparable requirements (including state personnel requirements) that apply to the profession or discipline in which such personnel are providing vocational rehabilitation services; and
2. to the extent that existing standards are not based on the highest requirements in the state applicable to a particular profession or discipline, the steps the state is currently taking and the steps the State Plans to take in accordance with the written plan to retrain or hire personnel within the designated state unit to meet standards that are based on the highest requirements in the state, including measures to notify designated state unit personnel, institutions of higher education, and other public agencies of these steps and the timelines for taking each step.

Be sure to include the following:

- specific strategies for retraining, recruiting, and hiring personnel;
- the specific time period by which all state unit personnel will meet the standards;
- procedures for evaluating the designated state unit's progress in hiring or retraining personnel to meet applicable personnel standards within the established time period;
- the identification of initial minimum qualifications that the designated state unit will require of newly hired personnel when the state unit is unable to hire new personnel who meet the established personnel standards;
- the identification of a plan for training newly hired personnel who do not meet the established standards to meet the applicable standards within the time period established for all state unit personnel to meet the established personnel standards.

## Personnel Standards

MVR has a system for ensuring the yearly evaluation (annual review of each counselor's CSPD status to arrive at the percentage of "qualified" staff") and performance of each staff member. The performance evaluation of rehabilitation counselors and other professionals is paramount to our efforts to ensure quality services to Montanans with disabilities. Our evaluations are tied to specific performance activities leading to those quality services.

The standard for counseling staff in Montana is to qualify to sit for the CRC examination or to have qualified to sit in the past, with the completion of additional coursework---and then to complete such coursework. Initially, MVR had targeted 2007 as the year in which we would meet our CSPD goal of having all counselors meet the standard of qualifying to sit for the CRCC examination. Unfortunately, as more experienced employees retire there is not a ready pool of qualified professionals to hire into those vacated positions. In "difficult to recruit for positions" MVR will hire individuals with a baccalaureate degree in a related field (at the minimum) and develop a CSPD plan to ensure that the employee moves toward qualifying to sit for the CRC examination. It typically takes an individual hired with a baccalaureate degree three years to meet the standard. Blind and Low Vision Services instructional staff must be eligible to hold certification from the Academy for Certification of Vision Rehabilitation and Education Professionals.

Montana has identified ten rehabilitation counselors who need graduate level training to qualify to sit for the CRC examination. Currently, one is enrolled in Utah State University, two are attending West Virginia University, and one is attending University of Wisconsin. MVR anticipates that the distance education graduate programs will take the average rehabilitation counselor approximately two to three years to complete. Without the distance-learning component, MVR would be unable to set this plan in motion, as this allows for the counselor to complete their graduate education while remaining on the job. Through continued use of the distance education programs, MVR anticipates maintaining/increasing the numbers of CRCs over the next several years. MVR counselors have completed a graduate program in rehabilitation counseling at an average rate of three per year. This has been the trend for at least the last eight years. Two counselors completed their plans in FY 2011.

CSPD requirements dictate graduate level coursework. CSPD funds are also written into the current in-service training grant; however, Rehabilitation Services Administration scholarships are utilized whenever available to the graduate student. MVR's comprehensive efforts to meet the training needs of staff provide significant benefit in terms of recruitment of new staff and retention of existing staff.

## Staff Development

Describe the state agency's policies, procedures, and activities to ensure that all personnel employed by the designated state unit receive appropriate and adequate training in terms of:

1. a system of staff development for professionals and paraprofessionals within the designated state unit, particularly with respect to assessment, vocational counseling, job placement, and rehabilitation technology; and
2. procedures for the acquisition and dissemination to designated state unit professionals and paraprofessionals significant knowledge from research and other sources.

## Staff Development

MVR does a complete training needs assessment on all employees each year. MVR identifies, through this process, major themes for training large groups as well as individualized training topics identified by staff and their supervisors. This assessment provides for a comprehensive set of training topics that remain fluid as emerging priorities are developed either at the national level or within the state. It is also used to provide information for conference planning purposes to associations such as the Montana Association for Rehabilitation and the Association for Education and Rehabilitation of the Blind and Visually Impaired.

The MVR Human Resource Development Specialist has responsibility for in-service training, the preparation of Montana's in-service training grant, and for overall coordination of the agency's comprehensive system for personnel development. MVR also completes CSPD assessments on all counselors in a plan to meet the standard. Each year, staff who do not meet the standard are counseled and their annual course of action is determined and documented. Of course, the purpose of this annual review is to continue to move counselors toward meeting the standard. Once counselors meet the standard by qualifying to sit for the CRC examination they receive a 3% pay raise, with an additional 3% upon successful completion of the CRC exam.

MVR places a heavy emphasis on leadership at all levels and continuous improvement of staff skills at all levels. Leadership and succession planning training are available to all staff in one form or another. MVR currently utilizes the Emerging Leaders Series through the Center for Continuing Education in Rehabilitation at Western Washington University and the state's leadership program for staff development. Building on the formalized leadership/management training available to staff through the aforementioned programs, MVR helps future leaders hone their skills through participation in the MVR Futures Group. Additionally, there is emphasis on training in the areas of rehabilitation technology, informed choice, cultural diversity, current rehabilitation trends and disability information, and the Rehabilitation Act with its amendments. Training on topics such as rehabilitation technology, assessment, vocational counseling, and job placement is held at annual meetings such as All Staff, Bi-District, and Montana Association for Rehabilitation conference in addition to online seminars (for example through the TACE). Often a representative of the agency is sent to out-of-state training to bring back and disseminate significant knowledge from research and other sources.

## **Personnel to Address Individual Communication Needs**

Describe how the designated state unit has personnel or obtains the services of other individuals who are able to communicate in the native language of applicants or eligible individuals who have limited English speaking ability or in appropriate modes of communication with applicants or eligible individuals.

### **Communication with Diverse Populations**

MVR requires that rehabilitation counselors who are hired specifically to work with deaf and hard of hearing consumers have fluent sign language skills. Sign language interpreters for the deaf or hard of hearing are also provided when necessary. Other accommodations, such as documentation in alternative formats, are routinely made by MVR. MVR policy is to consult with the consumer to determine the most appropriate mode of communication.

Montana has a relay system for telephone communication with consumers who are deaf or hard of hearing and all offices are equipped with Ubi-Duos. Three offices (with the highest numbers of deaf/hard of hearing clients) have video phones for enhanced communication. The Montana Telecommunications Access Program is housed in the Department and lends tremendous technical support to MVR working with sensory impaired consumers. The agency has also developed a full time Assistive Technology Specialist position. The Deaf Center is operational and provides interpreter referrals and other services to persons who are deaf or hard of hearing. MVR purchases interpreter services from the Deaf Center.

The issue of consumers whose primary language is not English is a very rare issue in Montana. The issue is most likely to occur with Native American consumers who are the largest minority group in Montana. Even with this group it is quite rare to have a consumer whose primary language is not English. Montana is fortunate to have six Native American vocational rehabilitation projects (funded through section 121 of the Rehabilitation Act) located in Montana. The local MVR offices have good working relationships with the Native American projects and they are an excellent resource for assisting Native Americans who are not English speakers.

The Billings region has the largest population of Spanish speaking consumers and they have utilized assistance from the local migrant council when working with consumers whose primary language is Spanish. In other very rare instances when working with consumers who speak other languages as their primary language, counselors have been able to utilize family members of the consumer to interpret. Also, Montana has many colleges and universities that offer a variety of foreign languages and if necessary it may be possible to utilize instructors or students from these programs to assist with interpreting or identifying community resources to assist with communication.

## **Coordination of Personnel Development Under the individuals with Disabilities Education Improvement Act**

Describe the procedures and activities to coordinate the designated state unit's comprehensive system of personnel development with personnel development under the Individuals with Disabilities Education Improvement Act.

### **Coordination of the CSPD and IDEA**

The MVR CSPD coordinates with the requirements of the CSPD under the Individuals with Disabilities Education Act in that both necessitate the following.

1. A description of the procedures and activities that the State of Montana will take to ensure an adequate supply of qualified personnel.

2. A system for determining, on an annual basis:

A. The number and type of personnel needed,

B. Which institutions of higher education in the state are preparing vocational rehabilitation personnel, the number of students enrolled in the programs, the number who graduate with credentials to qualify for employment with the agency, and

C. When to recruit, prepare, and retain qualified personnel, including personnel from minority backgrounds, and personnel with significant disabilities.

3. In-service training of all personnel.

4. Detailed in-service training procedures to ensure that all personnel have access to training resources to enhance their professional skills, ultimately improving service delivery to consumers.

The new transitions program manager continues to explore ways of coordinating training between MVR, OPI, and the schools. Across the state, there are a number of transition fairs that are held annually at the high schools. MVR presents at the transition fairs, and provides information regarding MVR services and how to access those services.

This screen was last updated on Jun 28 2011 4:06PM by Michael Hermanson

## Attachment 4.11(a) Statewide Assessment

Provide an assessment of the rehabilitation needs of individuals with disabilities residing within the state, particularly the vocational rehabilitation services needs of:

- individuals with most significant disabilities, including their need for supported employment services;
- individuals with disabilities who are minorities;
- individuals with disabilities who have been unserved or underserved by the vocational rehabilitation program; and
- individuals with disabilities served through other components of the statewide workforce investment system.

Identify the need to establish, develop, or improve community rehabilitation programs within the state.

The Rehabilitation Act, as amended in 1998, requires each state to conduct a statewide assessment every three years. Our current three year Needs Assessment, is a statewide assessment, jointly conducted by MVR and the MVR Council. This assessment examines the need to establish develop or improve community rehabilitation programs, and the rehabilitation needs of individuals with disabilities, particularly the vocational rehabilitation needs of:

1. Individuals with the most significant disabilities including their needs for supported employment services;
2. Individuals who are minorities and individuals with disabilities who have not been served or are underserved by the vocational rehabilitation program;
3. Individuals with disabilities served through other components of the statewide workforce investment system;

Three types of input were analyzed:

1. Direct inputs such as the consumer satisfaction survey, MVR counselor survey, focus forums (small regional groups of consumers), and the public hearing
2. Other indicators such as the Client Assistance Program report of needs, MVR Council input, program evaluation tools (standards and indicators, federal annual report, demographic trends, outreach activities conducted by program VISTA worker), and our current strategic plan summary
3. Priorities from other programs such as the federal priorities, federal draft strategic plan, and legislative priorities. Method

The assessment activities took place between March 5, 2008 and March 23, 2010.

As indicated above, the assessment sought information from a number of sources. MVR consumer focus forums were conducted each year in each region (Blind and Low Vision Services is treated as a region and conducts their own consumer focus forums each year). A consumer satisfaction survey was sent to MVR consumers each of the last three years: approximately 1500 surveys were sent out each year. The survey response rate was between 20 and 25 percent each year. A public hearing was held each of the last three years, with the first two hearings providing general input on improving the MVR program and the last hearing focusing on input on the draft goals, activities and performance measures of the MVR strategic plan. Teleconferencing sites were located in Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, Miles City and Missoula. Participation increased each year and ranged from about 75 participants to over 100 participants. Written comments were also accepted. The written comments increased from five to over 100. MVR counselors were surveyed in January 2010 to gather input on their perceived needs of the consumers that they serve and twenty-four

counselors responded. Six Section 121 tribal vocational rehabilitation projects were surveyed and MVR received responses from three of the project directors.

MVR and the Council met on January 14, 2010 to obtain Council input on the state plan and particularly on their input on the strategic plan for the next three years. MVR and the Council met again on April 15, to review a draft of the three year strategic plan. The plan was developed out of a meeting of MVR management staff, Council representatives (6), the MVR Council representative of the Statewide Independent Living Council, and the Client Assistance Program representative. The Council was also provided the MVR response to their recommendations of January 14. The Council expressed approval with the plan.

Needs of individuals with disabilities who have the most significant disabilities, including their need for supported employment services.

An individual with a "most significant disability" means an individual with a disability who meets the criteria for having a significant disability and in addition has serious limitations in two or more functional capacities (such as, but not limited to, mobility, communication, self-care, self-direction, interpersonal skills, work tolerance, or work skills) in terms of employment outcome.

Findings of the comprehensive statewide needs assessment for individuals with the most significant disabilities indicate needs for:

- Increased incentives for employers to hire individuals with the most significant disabilities.
- Expansion of services in rural areas
- Reduction of the extended support services waiting list for supported employment.
- Assistance with Social Security work incentives and protection of current SSI/SSDI benefits
- Increases in earnings and benefits
- Better transportation services
- Contact with mental health centers and promotion of supported employment services
- Assistance at the high school level with independent living and social skills
- Increased services for individuals with disabilities who are minorities and individuals with disabilities who have been unserved or underserved

According to census data (Table 3: Annual Estimates of the Population by Sex, Race, and Hispanic or Latino Origin for Montana: July 1, 2000 to July 1, 2008---SC-EST2006-03-30---release date May 14, 2008), 90.5% of Montana's population is white and 7.6% is Native American or a combination of Native American and another race. Other minorities make up the remaining 1.9% of the population. Six Section 121 Native American VR projects are located in Montana, covering six of the seven reservations located in Montana. Although most Native Americans on or near the reservation prefer to be served by their Section 121 project, a number are served by MVR or by both MVR and the Section 121 project. Last year, MVR served 1,390 minority consumers (17.5% of the caseload), of which 677 were Native American, 615 were of two or more races, 62 African Americans, 18 were Asian American, and 18 were Hawaiian or Pacific Islander.

Montana's population grew 8.1% between July 2000 and July 2008.

Native Americans

The majority of Native American Montanans live on reservations. Many more live just outside the reservation. However, Montana does have a number of urban areas that have Native American service centers (Billings, Butte, Helena, Missoula, and Great Falls).

Input on issues related to serving Native Americans with disabilities was received from a variety of sources:

Information received from tribal vocational rehabilitation project directors:

- There is a need for independent living services on the Reservations
- The Crow Nation should be encouraged to apply for a tribal vocational rehabilitation project
- There is a need for assistance related to the Ticket to Work Program
- Montana VR counselors need to make appropriate follow up when there are referrals from a tribal vocational rehabilitation project

• There is a need for assistance with Social Security benefits planning services on the Reservations

- There is a need for assistance related to assistive technology
- There is a need for a training on MonTECH services for tribal vocational rehabilitation programs

Information from MVR counselors that serve reservations:

- Transportation difficulties limit access to employment on reservations
- Difficulty in developing plans for employment due to lack of resources on the reservation
- Maintaining contact with consumers residing on the reservation is very difficult. This is especially true when the counselor can only visit the reservation once or twice a month
- Reservation consumers have difficulty with vocational planning. An example is that consumers may want an education, but don't tie getting an education to a vocational goal.
- There are problems getting good documentation of disability. Indian Health records are available, but often there is a wealth of information that is provided with little of the information relevant to the person's disabling conditions. Setting up appointments to get adequate documentation is difficult. Psychological testing and other specialty testing often requires going to a site off the reservation.
- There is a lack of job opportunities on the reservations and many of the consumers are not interested in leaving the reservation
- Many of the consumers residing on the reservation have difficulties transferring from tribal colleges to the state university system because they have not been prepared adequately for the demands of the university system
- There is a lack of sheltered and supported employment opportunities on reservations
- There is also some difficulty serving hearing impaired persons on the reservations, but on the Blackfeet Reservation there have been some procedures developed that have been successful recently.

Persons with Mental Disabilities including Severe and Persistent Mental Illness

In recent years, the disability makeup of Montana's caseload has significantly changed. In 1986, 69% of the consumers had physical disabilities, 19% had mental disabilities, and 12% had sensory disabilities. In 2009, 39% of the consumers had physical disabilities, 51% had mental disabilities, and 10% had sensory disabilities. The number of cases with mental disabilities has

significantly increased, especially in areas like severe and persistent mental illness, learning disabilities and attention deficit hyperactivity disorder. While the numbers served have grown, the fact that many of the MVR staff have had less experience working with this population has led to the MVR Council considering consumers with mental disabilities an underserved group because MVR counselors may not be able to provide the same level of quality with this group of consumers.

Findings of the comprehensive statewide needs assessment for individuals with mental disabilities including severe and persistent mental illness include:

- The need for more mental health centers to provide job placement and supported employment services
- More information regarding Social Security Work Incentives
- Improved transportation options • More vigorous outreach by MVR to the state hospital and mental health centers
- Better communication between MVR and the Addictive and Mental Disorders Division.

IN FY 2007, MVR identified the following goal and priority: “Participate in workforce investment activities to promote integration of services in order to optimize client service in an efficient manner.” Please refer to 4.11(e) (2) page five for MVR’s response.

MVR management staff, Council representatives (6), the VR Council representative of the Statewide Independent Living Council, and the Client Assistance Program representative met for two days in February 2010 to discuss the results of the comprehensive needs assessment, and to make recommendations regarding FY 2011-13 goals and priorities. This meeting developed a framework of goals, objectives, activities and performance measures, which was the initial draft of the three year plan presented in sections:

Attachment 4.11(c)(1) State Goals and Priorities

Attachment 4.11(d) State’s Strategies Assessment of need to establish, develop, or improve CRPs programs within the state. MVR continually assesses the need to establish, develop and improve CRPs utilizing all of the methods described throughout attachment 4.11 (a). Among the need areas being addressed at this time include:

- 1) Expansion of services to rural and remote areas by the continued certification of private providers who meet MVR qualification levels for job placement and job coaching services
- 2) Expansion of mental health providers as CRP’s to serve those with severe and persistent mental illness

## Attachment 4.11(b) Annual Estimates

- Identify the number of individuals in the state who are eligible for services.
- Identify the number of eligible individuals who will receive services provided with funds under:
  - Part B of Title I;
  - Part B of Title VI;
  - each priority category, if under an order of selection.
- Identify the cost of services for the number of individuals estimated to be eligible for services. If under an order of selection, identify the cost of services for each priority category.

During Federal Fiscal Year 2010, Montana Vocational Rehabilitation (MVR) estimates the following number of individuals will be served and the estimated cost of services:

Estimated number of people with disabilities with an employment disability in Montana between the ages of 16 to 64 is 85,337 (2006 American Community Survey).

Title I Vocational Rehabilitation - It is estimated that a total of 8,000 consumers will be served at a case cost of around \$9.1 million (including Social Security reimbursement funds), and 725 consumers will be employed.

Title VI-B funds - It is estimated that a total of 200 consumers will receive supported employment services at a case cost of around \$375,000. It is estimated that there will be 60 supported employment consumers employed.

Category	Title I or Title VI	Estimated Funds	Estimated Number to be Served	Average Cost of Services
Title I Consumers		\$9,100,000	8,000	\$1,137
Title VI-B consumers		\$375,000	200	\$1,875
				—
				—
				—
				—
				—
				—
				—
				—
<b>Totals</b>		<b>\$9,475,000</b>	<b>8,200</b>	<b>\$1,155</b>

## Attachment 4.11(c)(1) State Goals and Priorities

The goals and priorities are based on the comprehensive statewide assessment, on requirements related to the performance standards and indicators, and on other information about the state agency. (See section 101(a)(15)(C) of the Act.) This attachment should be updated when there are material changes in the information that require the description to be amended.

- Identify if the goals and priorities were jointly developed and agreed to by the state VR agency and the State Rehabilitation Council, if the state has a council.
- Identify if the state VR agency and the State Rehabilitation Council, if the state has such a council, jointly reviewed the goals and priorities and jointly agreed to any revisions.
- Identify the goals and priorities in carrying out the vocational rehabilitation and supported employment programs.
- Ensure that the goals and priorities are based on an analysis of the following areas:
  - the most recent comprehensive statewide assessment, including any updates;
  - the performance of the state on standards and indicators; and
  - other available information on the operation and effectiveness of the VR program, including any reports received from the State Rehabilitation Council and findings and recommendations from monitoring activities conducted under section 107.

Montana Vocational Rehabilitation's (MVR) mission is "Promoting work and independence for Montanans with disabilities". To accomplish this mission, MVR and the Montana Vocational Rehabilitation Council (Council) have developed the goals and priorities, which are listed below. These goals are not in any order of priority.

As stated in 4.11(a), MVR and the Council met on January 15, 2010 to look at long range needs, and to begin development of the State Plan. MVR management staff, Council representatives, the Statewide Independent Living Council chair, and the Client Assistance Program representative met again in February 2010 to discuss the results of the comprehensive assessment, and to make recommendations regarding FY 2011-13 goals and priorities. Each of the preceding reviews included a review of the standards and indicators and yearly performance related to the standards and indicators.

The goals and priorities (identified as objectives) established for the ensuing three years were:  
Goal #1: Improve the infrastructure that supports MVR in order to increase the agency's potential to promote work and independence for Montanans with disabilities.

Objective 1.1: Increase transportation options for Montanans with disabilities that impact employment opportunities for MVR consumers.

Objective 1.2: MVR will implement procedures and practices that improve counselor infrastructure/supports to increase quality time spent with clients and improve client outcomes.

Objective 1.3: Establish and/or enhance effective working relationships with a broad range of organizations that assist individuals with disabilities in achieving employment.

Objective 1.4: Improve Disability Employment, Independence and Transitions compliance with relevant federal and state civil rights laws that prohibit disability discrimination.

Goal #2: Assure high quality employment for Montanans with disabilities through the vocational rehabilitation program.

Objective 2.1: Provide functionally equivalent services to unserved and underserved populations.

Objective 2.2: Address the high status 30-to-closure ratio.

Objective 2.3: Provide rehabilitation services that lead to successful outcomes in employment for transition age youth 14-24 years of age will need to be hired each year.

## **Attachment 4.11(c)(3) Order of Selection**

- Identify the order to be followed in selecting eligible individuals to be provided vocational rehabilitation services.
- Identify the justification for the order.
- Identify the service and outcome goals.
- Identify the time within which these goals may be achieved for individuals in each priority category within the order.
- Describe how individuals with the most significant disabilities are selected for services before all other individuals with disabilities.

**This agency is not implementing an Order of Selection.**

This screen was last updated on Jun 29 2009 1:45PM by Michael Hermanson

## Attachment 4.11(c)(4) Goals and Plans for Distribution of Title VI, Part B Funds

Specify the state's goals and priorities with respect to the distribution of funds received under section 622 of the Act for the provision of supported employment services.

Supported employment services are provided on a statewide basis through the Title VI, Part B funds. Supported employment is competitive employment or employment in integrated work settings in which individuals are working toward competitive work, with ongoing support services for individuals with the most significant disabilities for whom competitive employment has not traditionally occurred or for whom competitive employment has been interrupted or intermittent as a result of a significant disability. Supported employment includes transitional employment for individuals with the most severe disabilities due to mental illness.

Fund allocation on a statewide basis ensures an equitable statewide service delivery. The goal of the state's supported employment program is to maintain a system whereby individuals with the most significant disabilities are afforded the opportunity to participate in integrated competitive employment. Title VI, Part B funds will be distributed through four MVR regional budgets. Rehabilitation counselors at the local level will authorize supported employment services as needed from the Community Rehabilitation Programs statewide. MVR estimates that approximately \$375,000 will be expended on Supported Employment services in FY 2011. Funding sources include: \$300,000 in Title VI, Part B funds, supplemented with approximately \$75,000 in Title 1 (Section 110) funds. It is estimated that a total of 200 consumers will receive supported employment services. It is estimated that there will be 60 supported employment consumers employed.

Supported employment services are available statewide.

Strategies: Inventory methods of supporting consumers on the job following supported employment outcomes

- A. Extended Employment - Rocky Mountain Rehab
- B. Mental Health cooperative agreement
- C. Developmental Disabilities cooperative agreement
- D. Private pay to CRP (CRP is signoff)
- E. Natural supports
- F. Medicaid waiver program

G. In 2009, the Missoula region began looking at using employment related work expenses as a method to support consumers on the job following supported employment outcomes. At this time few consumers have been able to use this method, but it will continue to be explored in FY 2012.

Expand resources for extended support services by asking the legislature for more funding: MVR requested additional money and the 2009 legislature made an additional \$196,752 available for each year of the biennium. In the 2011 legislature, the funding remained level for the two years of the biennium. This was the goal for this legislature because of the fiscal downturn.

Expand the number of mental health providers as CRPs to serve those with severe and persistent mental illness. There are currently five mental health providers that provide supported employment services.

## Attachment 4.11(d) State's Strategies

This attachment should include required strategies and how the agency will use these strategies to achieve its goals and priorities, support innovation and expansion activities, and overcome any barriers to accessing the vocational rehabilitation and the supported employment programs. See sections 101(a)(15)(D) and (18)(B) of the Act and Section 427 of the General Education Provisions Act (GEPA.)

- Describe the methods to be used to expand and improve services to individuals with disabilities.
- Identify how a broad range of assistive technology services and assistive technology devices will be provided to individuals with disabilities at each stage of the rehabilitation process.
- Describe how assistive technology services and devices will be provided to individuals with disabilities on a statewide basis.
- Identify what outreach procedures will be used to identify and serve individuals with disabilities who are minorities, including those with the most significant disabilities.
- Identify what outreach procedures will be used to identify and serve individuals with disabilities who have been unserved or underserved by the VR program.
- Identify plans for establishing, developing, or improving community rehabilitation programs, if applicable.
- Describe strategies to improve the performance with respect to the evaluation standards and performance indicators.
- Describe strategies for assisting other components of the statewide workforce investment system in assisting individuals with disabilities.
- Describe how the agency's strategies will be used to:
  - achieve the goals and priorities identified in Attachment 4.11(c)(1);
  - support innovation and expansion activities; and
  - overcome identified barriers relating to equitable access to and participation of individuals with disabilities in the state Vocational Rehabilitation Services Program and the state Supported Employment Services Program.

### Methods Used to Expand and Improve Services to Individuals with Disabilities

The comprehensive needs assessment is the primary process for identifying areas related to innovation and expansion and innovation and expansion funds are used to support activities related to this process. Activities supported in this regard include the consumer satisfaction survey and meetings for the MVR Council and the Statewide Independent Living Council.

### Identification of How a Broad Range of Assistive Technology Services and Assistive Technology Devices will be Provided at Each Stage of the Process

The primary method of providing assistive technology and devices to consumers has been through the relationship with MonTECH of the University of Montana Rural Institute (Rural Institute). MonTECH is Montana's federally funded assistive technology project since 1991. MonTECH's primary purpose has been to assist individuals with disabilities to maintain or increase their level of functioning and independence in all environments through the access to and use of assistive technology devices and services to consumers throughout the state. The current strategy for more effectively using MonTECH's resources is an annual training for MVR staff to learn more about the services available through MonTECH and how to access them. Also, MVR has made available to CRPs and Section 121 projects funds to attend MonTECH training through ARRA funds. Several CRPs and Section 121 projects have indicated that they will pursue the training with the ARRA support.

The Blind and Low Vision Services (BLVS) assistive technology specialist provides training and support to BLVS consumers and staff on technology related to blind and low vision issues. The MonTECH program conducted a training for the BLVS staff during June of 2010. The training focused on technology for individuals with visual disabilities.

### Description of How Assistive Technology Services and Devices will be Provided on a Statewide Basis.

MonTECH has implemented a process of demonstrating equipment and assessing technology needs through the use of video conferencing via computer. MVR hopes to assist with expansion of these efforts through expanding the computer communication technology available in MVR

offices. MVR recruited a VISTA member to assist with research in this area and installing equipment and staff training.

Each BLVS regional office has a rehabilitation teacher who has background in technology related to blind and low vision and each regional office has some demonstration equipment available for consumers to test equipment before purchase. MonTECH provides additional demonstration equipment to the three BLVS offices outside of Missoula (MonTECH is located in Missoula and their office supplements the BLVS resources for that region).

Outreach Activities to Identify and Serve Individuals with the Most Significant Disabilities who are Minorities.

Native Americans represent the only significant minority group in Montana (7.5%). Montana has seven reservations and thirteen tribes within autonomous governing bodies. The Little Shell Chippewa Tribe was recently granted Montana recognition. MVR has counselors who serve consumers on each reservation. These counselors coordinate with Section 121 project staff to identify potential referrals and resources.

Native Americans with disabilities living on reservations face unique challenges. First, they are eligible for a combination of tribal, federal, and state programs to meet their vocational and health needs. This requires extensive coordination and cooperation between agencies. Secondly, they are faced with significant cultural and economic barriers. Unemployment on these reservations varies from 24% to 70% (Bureau of Indian Affairs, US Department of the Interior, 2007). Today there are very few private or self-employment opportunities on reservations: most employment comes through tribal and federal programs.

Six Section 121 vocational rehabilitation projects (Confederated Salish & Kootenai, Blackfeet, Chippewa Cree, Fort Peck, Fort Belknap, and Chief Dull Knife College) are located in Montana. This gives improved access to vocational rehabilitation services for persons with disabilities being served by the Section 121 projects. MVR counselors assigned to these six reservations coordinate with each project staff as needed. In addition, the MVR program manager visits each 121 project annually and provides technical assistance when requested. Four of the Section 121 projects have their current funding cycle coming to an end this year and have to reapply competitively to maintain their programs over the next five years. If any of the projects are unsuccessful in maintaining their funding, MVR will work to provide as smooth of transition in services from the Section 121 project to MVR as possible.

Native American consumers living on reservations have a choice of either being served by the Section 121 projects, state MVR, or in some cases, jointly by both parties.

Section 121 projects have a better grasp of the cultural and service delivery barriers that exist on reservations and can help support MVR counselors as needed. In some cases, MVR has access to specialized programs, or services, which are not always found on reservations. MVR's efforts are to network, coordinate, offer technical assistance, and provide training opportunities for project staff, to ensure consumers with disabilities have access to the full range of vocational rehabilitation services. Six cooperative agreements have been written and are monitored on an annual basis.

The Confederated Salish/Kootenai Tribes 121 program has been approved as an employment network under the Ticket to Work Program. Chief Dull Knife and Fort Belknap Projects are exploring the possibility of becoming an employment network.

In order to ensure that MVR is meeting the needs of Native Americans that do not live on or near the reservation, in the past year MVR staff has met or have plans to meet with:

Missoula Native American Center

Helena Indian Alliance

Great Falls Indian Family Health Center

Butte - North American Indian Alliance

Indian Health Board of Billings Clinic

Possibly because of these outreach efforts, over the past three years the number of Native American consumers served in the counties served by the urban centers has increased.

MVR provided program and referral information, literature regarding MVR and MVR transitions, and discussed transitions services for youth.

In Great Falls, a counselor has been assigned as a liaison to the Indian Family Health Center to ensure that those eligible for MVR services receive the appropriate information, and are referred in a timely manner.

Identification of Outreach Procedures Used to Identify and Serve Individuals with Disabilities who have been Unserved or Underserved by the MVR Program

For several years MVR has considered Native Americans as the unserved/underserved population of the state. However, in the last year MVR and the MVR Council have begun activities to research other potential unserved/underserved populations. The Native American committee has changed its name and purpose. The name is now the unserved/underserved committee and the purpose has been changed to research an array of other possible unserved/underserved populations and develop strategies for those populations in addition to the Native American population. In October of 2008, the committee selected the following populations to be researched as possibly unserved/underserved:

foster care youth/home schooled youth

hard of hearing

traumatic brain injured veterans

Native American/other minorities

transition youth

mentally ill

A VISTA working has been involved with setting up a system of identifying unserved/underserved populations.

Plans for Establishing, Developing, or Improving Community Rehabilitation Programs

MVR continually assesses the need to establish, develop and improve Community Rehabilitation Programs (CRP) utilizing all of the methods described throughout attachment 4.11 (a). Among the need areas being addressed at this time include:

1. Expansion of services to rural and remote areas by the continued certification of private providers who meet MVR qualification levels for job placement and job coaching services
2. Expansion of mental health providers as CRP's to serve those with severe and persistent mental illness

## Describe Strategies to Improve the Performance with Respect to the Evaluation Standards and Performance Indicators

Many of the strategies developed to meet the goals established by the comprehensive needs assessments are aimed at improving the standards and performance indicators of MVR. Those strategies are detailed in 4.11 (c) (1).

Also, MVR has incorporated the standards and indicators into performance appraisals for staff. MVR and the Council will continue to monitor the performance outcomes throughout the year and work to consult with MVR regional administrators to assure compliance in meeting the required indicators. MVR tracks the indicators on a quarterly basis so adjustments can be made in areas that may need some attention.

## Strategies for Assisting other Components of the Statewide Workforce Investment System in Assisting individuals with Disabilities

MVR staff are members of the local community management teams (CMTs) and the statewide area management team (SAM). MVR has a cooperative agreement with the SAM. As members of these teams, MVR staff offer consultation and technical assistance on disability issues as needed.

Agency's strategies to: Achieve Goals and Priorities Identified in Attachment 4.11 (c)(1)

In February 2010, MVR management staff met with representatives of the MVR Council to discuss comprehensive needs and priorities for the upcoming year. The group looks at formal input from public hearings, focus forums, MVR staff, consumer satisfaction survey, Client Assistance Program, MVR Council, state and national sources (CSAVR, RSA policy changes, Legislative activities, umbrella agency activities), and other surveys. Information from this meeting is used to plan for the next three years and for the legislature.

The American Recovery and Reinvestment Act (ARRA) funds will be utilized to achieve the following goals and strategies. The general guidelines for planned expenditure of the ARRA funds are to support areas necessary to continue to successfully assist eligible consumers with disabilities to achieve their employment goals. This effort is designated as keeping the agency whole. The second area for expending funds relates to improving infrastructure, particularly in the area of technology, which is an issue in several goals and strategies detailed later in this document. The third area is in the area of providing support to MVR partners. Various specific uses of ARRA funds are discussed within the narrative sections impacted.

MVR and the Montana Vocational Rehabilitation Council (Council) have developed the goals, objectives, and strategies. In addition performance measures have also been identified and will be used over the next three years to measure progress.

## MVR STRATEGIC PLAN 2011-13

Goal #1: Improve the infrastructure that supports MVR in order to increase the agency's potential to promote work and independence for Montanans with disabilities.

Objective 1.1: Increase transportation options for Montanans with disabilities that impact employment opportunities for MVR consumers. Strategies: MVR will:

1. Partner with Montana's Statewide Independent Living Council and Montana's centers for independent living on transportation initiatives.

2. Attend local Transportation Advisory Council (TAC) meetings and advocate for changes in local transportation plans that will benefit persons with disabilities. Consumers will also be encouraged to attend TAC meetings.
3. Actively participate in the joint Department Public Health and Human Services and Department of Transportation conference/summit in order to develop solutions that address transportation barriers for Montanans with disabilities.
4. Ensure that information and the resources gathered by Disability Employment, Independence, and Transitions' transportation coordinator gets distributed to all staff on a regular basis.
5. On the regional level, explore best practices such as taxi discounts and work at home options. Success will be shared with other regions for potential replication.

Performance Measures:

- Each fiscal year, beginning with fiscal year 2011, MVR will decrease the number of cases closed because of transportation barriers from the previous year.
- Each fiscal year, beginning with fiscal year 2011, each region will report successful transportation initiatives in their area to the state office. The regional reports will be consolidated into a state report and distributed to the regional administrators and State Rehabilitation Council for review and suggestions for new statewide initiatives suggested by the regional successes.

Objective 1.2: MVR will implement procedures and practices that improve counselor infrastructure/supports to increase quality time spent with clients and improve client outcomes.

Strategies: MVR will:

1. On a quarterly basis, review the computerized case reporting system (CASE-E) and other office procedures to identify best practices and system changes in order to make the system more efficient for counselor use.
2. Provide training on policies and practices to ensure consistency.
3. Explore technology options to reduce travel time for staff in areas such as staff training and consumer contacts.
4. Use MVR quarterly newsletter to share best case service practices between regions.
5. Do a yearly staff needs assessment for training that focuses on issues that create stress for counselors and areas that may increase efficiency of routine procedures.
6. Use the recently developed statewide application packet and provide adequate training on use of the packet.
7. Continue "myth busters" as a method for dispelling inappropriate interpretations of policy and other inconsistent practices.
8. Develop guidelines on procedures for reinforcing training issues on the local level, including procedures for monitoring implementation by counselors. While this is a need in all training areas, the initial focus will be on the "use of technology" training.

Performance Measures:

- Each fiscal year, beginning with fiscal year 2011, MVR will meet the standards and indicators.

- Each fiscal year, beginning with fiscal year 2011, there will be a decrease in the number of waivers from the previous year for extended time between the time a consumer is found eligible for services and the IPE is completed.
- Each fiscal year, beginning with fiscal year 2011, the positive ratings in the consumer satisfaction survey on the questions: “My relationship with my counselor has been helpful and productive?” and “How would you rate the quality of service you received?” will be at least 85%.
- Each fiscal year, beginning with fiscal year 2011, the number of counselor sick days used will decrease from the previous year.
- Each fiscal year, beginning with fiscal year 2011, there will be a decrease in calls to Client Assistance Program from the previous year.

Objective 1.3: Establish and/or enhance effective working relationships with a broad range of organizations that assist individuals with disabilities in achieving employment.

Strategies: MVR will:

1. Develop and enhance working relationships with public and private organizations, state agencies and organizations such as the State Rehabilitation Council, the Veteran’s Affairs Vocational Rehabilitation Program, the Department of Corrections, and consumer advocacy groups.
2. Assign MVR liaisons to appropriate organizations, committees and councils to promote mutual goals and achievements.

Performance Measures:

- Each year of the plan, MVR will review for evidence of record (e.g., minutes; agendas; agreements) for documentation of the participation of MVR in partnerships and collaborative activities directed at enhancing the employment of individuals with disabilities.
- Each year of the plan, MVR will review for evidence a large variety of documents and activities for documentation that MVR regards partnerships as an essential part of doing business. Prominent examples include the State Rehabilitation Council, an MOU with the Veteran’s Affairs Vocational Rehabilitation Program, programs supported by the Department of Corrections and more.

Objective 1.4: Improve Disability Employment, Independence and Transitions compliance with relevant federal and state civil rights laws that prohibit disability discrimination.

Strategies: MVR will:

1. Complete and update the Americans with Disabilities Act Self-evaluation and Transition Plan for programs and facilities of Disability Employment, Independence, and Transitions.
2. Identify and eliminate barriers to AWACS, Case-E, and ISERV software by employees who are blind, visually impaired, or otherwise print disabled and who use assistive technologies to access that software.
3. Expand the options for qualified sign language interpreter and captions services through the development of remote service contracts and Internet or video phone based communications for the deaf and hard of hearing.

4. Establish a policy and procedure as well as ongoing training for the publication of accessible documents created for internal and external use by Disability Employment, Independence, and Transitions.

Performance Measures:

- By the end of the first year of this plan, the Americans with Disabilities Act Self-evaluation and Transition Plan for programs and facilities of Disability Transitions Programs will have been completed.
- By the end of the third year of this plan, there will be evidence of progress made on removing barriers identified in the Americans with Disabilities Act Self-evaluation and Transition Plan.

Goal #2: Assure high quality employment for Montanans with disabilities through the vocational rehabilitation program.

Objective 2.1 Provide functionally equivalent services to unserved and underserved populations.

Strategies: MVR will

1. Develop a specific set of procedures for identification of underserved.
2. Meet with representatives of the deaf and hard of hearing community, Native American, and mental health communities to discuss changes to MVR practices that could improve services to these groups.
3. Explore ways to increase the service capacity for rehabilitation providers for rural communities.
4. Complete a comprehensive review of agency materials to make sure all our materials are in accessible formats.
5. Explore telework opportunities in rural areas.

Performance Measures:

- Have a procedure in place for identifying unserved and underserved populations at least one year prior to the next strategic planning session to get input from those groups for the strategic planning meeting.
- Each fiscal year, beginning with fiscal year 2011, there will be an increase from the previous year in successful closures with health insurance benefits of minority groups and other groups identified as unserved or underserved.
  - Each year, the positive ratings in the consumer satisfaction survey for the question “I am satisfied the plan my counselor and I developed met my needs to achieve my employment goal” will be at least 90% for 26 closures of consumers from minority groups and other groups identified as unserved and underserved.
- Each fiscal year, beginning with fiscal year 2011, there will be an increase in the number of consumers from minority groups and other unserved and underserved groups who have plans developed from the previous year.
  - Each fiscal year, beginning with fiscal year 2011, standards and indicators related to minority ratio will be met.

Objective 2.2 Develop a plan to address the high status 30-to-closure ratio. Strategies: MVR will

1. Conduct an analysis of status 30 closures to identify common characteristics that might be amenable to targeted strategies.
2. Review research being conducted through MVR's Future's Group to determine if there are recommendations that can be implemented.
3. Conduct a telephone survey of all status 30 closures and provide recommendations on changing procedures based on survey results if appropriate.

Performance Measurements:

- Each fiscal year, beginning with fiscal year 2011, there will be a 3% decrease in status 30s from the previous year.
- Each fiscal year, beginning with fiscal year 2011, there will be a decrease in the ratio of 30s to 26s and 28s from the previous year.

Objective 2.3 Provide rehabilitation services that lead to successful outcomes in employment for transition age youth 14-24 years of age.

Strategies: MVR will

1. Conduct analysis of the Missoula pilot program in transitions to determine impact and potential best practices and explore options for expanding elements of the program to other parts of the state.
2. Provide on-going transitions training to MVR counselors.
3. Outreach to school administrators and school board groups to discuss and explain transitions issues.
4. Collaborate with entities who serve dropouts, youth in foster care and older youth (juvenile justice, etc.) to work on transitions strategies for these populations.
5. Work with Montana Youth Transitions Coalition on initiatives related to transitions issues.
6. Explore alternate models of Individual Plans for Employment (IPE) that meet the needs and circumstances of transitions age youth, including possibly incorporating the IPE as part of Individual Education Plans.
7. Identify and encourage the use of best practices for informing parents and family members about Vocational Rehabilitation services.
8. Develop a transitions data tracking system including, but not limited to:
  - a. Outcomes
  - b. Outreach strategies
  - c. Types of services
  - d. Service costs The tracking system will be utilized to develop strategies that focus on specific issues identified in the data.

Performance Measurements-

- Each fiscal year, beginning with fiscal year 2011, increase the number of 26 closures for transitions age youth (14-24) by 3% over the previous year.
- Each fiscal year, beginning with fiscal year 2011, increase the number of consumers of transitions age (14-24) on the MVR caseload by 5% over the previous year.



## Attachment 4.11(e)(2) Evaluation and Reports of Progress

### Vocational Rehabilitation (VR) and Supported Employment (SE) Goals

1. Clearly identify all VR program goals consistent with the goals described in the FY 2010 Attachment 4.11(c)(1), including an evaluation of the extent to which the VR program goals were achieved.

- Identify the strategies that contributed to the achievement of the goals.
- Provide a description of the factors that impeded the achievement of the goals and priorities.

#### Evaluation and Report of Progress in Achieving Goals and Priorities

The following describe actions taken in support of MVR's Goals and Priorities identified in the comprehensive needs assessment:

1. Successfully assist people with disabilities to achieve their employment goals.

A. Continue to meet the standards and indicators, on our federal report card. Montana met all the standards and indicators in 2007. In 2008,

Montana Vocational Rehabilitation (MVR) met all the standards and indicators except the minority ratio. In 2009, MVR met all the standards and indicators except Change in Employment Outcomes, the goal was 913 and MVR placed 799. . In 2010, MVR met all the standards and indicators except two. The two that were missed were Change in Employment Outcomes and Rehabilitation Rate The goal for Change in Employment Outcomes was 800 and MVR placed 716. The goal for Rehabilitation Rate was 55.8% and MVR's rate was 41.9%. The economy in Montana worsened significantly in the last two years and impacted the MVR outcomes. It is hoped that through an improved economy that MVR will meet all objectives in fiscal year 2011.

B. Continue achieving high consumer satisfaction feedback by meeting or exceeding 85% on consumer survey question, "In an overall general sense, how satisfied are you with the services you received?"

The percentage of consumers indicating satisfaction on this item for each year was:

2007 85%

2008 86%

2009 85%

2010 83%

MVR's satisfaction rate was very consistent throughout the three year period of the strategic plan. There were a number of negative factors that could have created issues with consumer satisfaction during this time period such as significant staff turnover at times, reorganization and a change in MVR leadership, and the poor economy. So, it is gratifying that these factors did not seem to impact the consumer satisfaction, except during the last year and then there was a small decline.

C. Refine our methods to identify unserved and underserved populations and how to serve them. Evaluate methods over the next three years on developing ways to measure unserved and underserved.

The MVR Council continues to work on this. MVR has enrolled VISTA (Volunteer in Service to America) worker to address serving the unserved and underserved populations. She has made visits around the state seeking information from MVR staff, MVR consumers, and MVR partner agencies on what groups might be considered unserved/underserved. She unfortunately was not able to completely process her results. MVR intends to process those results and develop a specific method of identifying unserved/underserved population using demographic information and case information along with the information gathered by the VISTA worker.

D. Make available a list of qualified benefits planners.

Each region has done this. Most of Montana's benefit planners are housed in the independent living centers. The lists are updated when new information is available. Two CRPs used their ARRA training resources to have staff complete the Social Security endorsed training on benefits planning.

E. Offer referrals to benefit planners (CWICs) at intake to new SSI and SSDI clients.

This was implemented in all regions and is seen by counselors as being very effective.

F. Increase the percentage of rehabilitated consumers who have health insurance at closure.

The following table shows insurance rates since the baseline year of fiscal year 2006:

The rate has decreased in the last two years from the baseline year of fiscal year 2006. The decline was particularly significant in the last year. The poor economy was probably one factor in the decline.

Year..	Employer Health Insurance	.Any Health Insurance (Includes Medicaid/Medicare)
2006 .....	26.1%.	69.5%
2007.....	26.2%.	70.9%
2008.....	25.3%.	72.5%
2009.....	24.4%.	67.6%
2010.....	22.3%.	67.3%

The rate of employer provided health insurance has decreased most years from the baseline year of fiscal year 2006. The decline was particularly significant in the last year. The poor economy was probably one factor in the decline

G. Have CRP liaisons find out from placement specialists what the need, availability and use of soft skills training is in their region. Also have the workforce liaisons investigate this.

Each region has identified resources in their region. In addition, some regions have developed specialized soft skills training for consumers with most severe disabilities.

H. Train consumers in transportation options by asking the independent living centers to present travel training at each regional office every two years.

MVR has been involved with travel training where this is available. MVR has also been involved with a number of other initiatives to address barriers related to transportation. One significant

development was that during reorganization the Department's transportation coordinator was placed in the same unit as MVR. This has created a number of collaborative activities including working on issues such as: gas purchases, van modification purchases, and collaborations with public transportation. The emphasis of addressing barriers to employment created by transportation continues in the new strategic plan. Also, MVR is attempting to develop a process for monitoring progress related to transportation issues.

I. Provide more access regarding new and emerging technologies by providing training at statewide events such as the Annual All Staff meeting. Sources of training could be Parents Let's Unite for Kids (PLUK) and the Rural Institute.

MVR is using video phones and Poly-Com Internet Based Technology for Individual Education Program (IEPs) and training.

BLVS hired an assistive technology specialist in the fall of 2007. He has conducted a number of trainings related to assistive technology for persons with visual impairments.

Assistive technology training was held at MonTECH in August 2008, June 2009, and June 2010. Representatives of each region attended, and attendees indicated the training was very useful. In the last year, CRP and Section 121 staff also attended with the support of ARRA funds provided by MVR. The plan is to continue this training for the foreseeable future.

Video technology (Sorenson System) is being used in MVR offices to communicate with deaf consumers.

MVR recruited a VISTA member to assist with the initial research and planning for development of the use of technology to increase options for contacting consumers in the rural areas of Montana. The VISTA has researched video conferencing that will be used in the

MVR offices. Video conferencing equipment has been purchased and training was provided on how to use it. These systems have been used for a number of trainings and statewide meetings. MVR provides bi-monthly training via Web-Ex (a web based conferencing system) to the field staff.

UbiDuos (communication device that allows individuals who are deaf/hard of hearing or who have a speech impediment to communicate more efficiently with others) were purchased for each MVR field office.

Exploring and implementing the benefits of assistive technology continues to be an emphasis in the new strategic plan.

2. Assure that consistent, high quality transitions services are made available statewide

A. Continue identifying and communicating with students with disabilities in schools.

During the last three years MVR has piloted a transition program that placed a MVR counselor in high schools of one of Montana's major cities. This pilot has proved successful in increasing the number of referrals to MVR from the schools involved. The pilot generated a number of materials and procedures, which are in the process of being implemented in other parts of the state. Significant materials developed include a model cooperative agreement to use in schools, and a simple web based tool to assist student go through specific steps to ensure they are prepared to leave high school and begin pursuing adult goals.

MVR has set goals for the number of high schools for each region to complete cooperative agreements with. Also, statewide training has been provided web based transitions tool described above. In the upcoming school year all major high schools in Montana will have a counselor assigned to the school that will be regularly scheduled to be available in the school. Procedures learned in the pilot project have made this initiative feasible even for counselors caring a regular caseload.

MVR assisted in hosting statewide transitions conferences in 2008, 2009, and 2010. These conferences have assisted in opening communication between MVR, the schools, parents, students, and other stakeholders in the transition process.

MVR employees regularly participate in career fairs, attend IEP meetings, and make presentations at the schools. MVR staff have presented at a number of conferences related to transition

B. Continue updating and maintaining MVR liaisons with schools and the school contact list for transitions.

A counselor is assigned to each high school in Montana, and the list of these contacts is updated in the MVR central office. The list is accessible on the MVR website.

MVR and the Office of Public Instruction (OPI) are working together to make the list more user friendly.

The link to the this list also has been placed on the Montana Youth Transitions (MYTransitions) website a one stop transitions site developed through a contract with MVR.

C. Continue relationships with OPI, PLUK, and the Montana Youth Leadership Forum (MYLF).

During 2007, 2008, 2009, and 2010 counselors from each region participated in MYLF and met with students from their regions. Arrangements have been made to continue this activity with MYLF on an ongoing basis.

MYLF participants have indicated that having MVR staff available throughout the forum does assist with gaining a better understanding of MVR services and processes.

Also, over the last year regional transition teams have been established through the facilitation of My Transitions a project funded through contract with MVR. The regional teams provide transition stakeholders an opportunity to meet together to increase awareness of resources, and collaborate on ways to improve the local transition process.

MVR has a signed cooperative agreement with OPI. MVR's CSPD staff is on the OPI Comprehensive System Personnel Development (CSPD) Advisory Board, meeting quarterly.

D. Continue to explore video conferencing for transitions services.

Video conferencing is being used for IEPs, meetings between offices, and meetings with deaf consumers.

There have been issues with compatibility of services - not everyone has the same system, and most systems only work with ones from the same manufacturer.

As mentioned previously, MVR recruited a VISTA member to assist with the research regarding these issues. Overall, in the last year a great deal of progress will have been made in getting

MVR staff the equipment and knowledge necessary to utilize video conferencing for IEP meetings.

In the new strategic plan improving transitions remains a major priority and it is hoped that the technological changes made in recent years will impact the performance measures for transitions services in the upcoming plan.

E. Determine how many high school students we are serving, not serving, and who and where they are.

MVR recruited a VISTA member to assist with gathering information on this issue.

MVR Clients (ages 16 to 21) served 2009: 1,444

OPI Students in IEPs (ages 16-21) 2009: 3,195 While the above data sets are not an ideal comparison of the two groups is was the best that could be developed at this time. The age range for the data sets does help to compensate for the fact that while many students are in IEPs at age 16, not many are served by MVR. However, at 21, not many are in IEPs, but many are receiving services from MVR. Therefore, taking the entire five year cohort roughly approximates the number of students with disabilities that have migrated into MVR services. The data sets indicate that a number of students in IEPs are not moving to MVR services by age 21. In an attempt to answer the questions of who MVR is serving or not serving a comparison was made based on disability type. Again, the data sets do not match up ideally in that some of the terminology related to disability type does not match up between the two data sets, but the findings indicate that MVR is actually serving more than the number of students in IEPs in the following disability areas:

mental retardation	MVR (364)	OPI (260)
hearing impairment	MVR (70)	OPI (33)
visual impairment	MVR (36)	OPI (10)
emotional disturbance	MVR (275)	OPI (215)
orthopedic impairment	MVR (106)	OPI (11)
autism	MVR (74)	OPI (56)
traumatic brain injury	MVR (45)	OPI (25)

Some of the factors that may be impacting the above numbers are:

in some disability categories not all students with disabilities are in IEPs

drop outs with disabilities would not be in IEPs

MVR may be picking up some consumers who were in IEPs in other states and moved to Montana after leaving school.

The disability areas where OPI had more students in IEPs than MVR had in services were:

speech and language impairment	MVR (3)	OPI (63)
specific learning disabilities	MVR (295)	OPI (1,956)

There are very large differences between the data sets in these two categories. One explanation is that the level of impairment for both of these disability types may vary with regard to being eligible for IEP services and being eligible for MVR services. This factor certainly is involved

with specific learning disabilities because this type of disability impacts learning activities much more than vocational activities for many individuals. Because the above findings indicate that learning disabilities is a category that MVR serves at a much lower rate than the special education system in schools, MVR reviewed its policy on eligibility related to learning disabilities and has made some changes that may increase the number of persons with learning disabilities found eligible for MVR. Also, the transitions pilot project identified procedures related to assisting school staff to understand MVR eligibility for students with learning disabilities.

Disability categories that had higher numbers in IEPs than in MVR services where there are significant issues in matching up disability definition from one data set to the other:

other health impairment	MVR (119)	OPI (400)
multiple disabilities	MVR (57)	OPI (161)

It is difficult to determine whether there really is a difference between the two data sets because assigning individuals to these groups does not match up well between the data sets.

With regard to the questions of who the specific individuals are, there is no method for matching up all students on IEPs and who is receiving MVR services. The confidentiality guidelines of both MVR and OPI do not allow a direct matching of the data sets served through the agencies.

With regard to where they are, the OPI data on IEP students is for the whole state. MVR will need to explore further methods for evaluating regional differences.

F. Develop a public relation (PR) plan to reach students with disabilities, parents, school staff, and community agencies on transitions services.

Public relations efforts with the schools include distributing posters and brochures, contacting individual schools, making presentations, and having counselors attend MYLF. At least one counselor from each region attends MYLF for an entire day and makes contacts with students from that region.

The transitions program manager has developed a web presentation for parents, agency representatives, and teachers.

G. Invite a school representative to discuss transitions in each region.

This did not occur to the degree anticipated. Only a few visits were reported.

H. Explore transitions programs in other states.

The transitions program manager has attended national meetings and has met with leaders in the transitions effort. The Rural Institute staff keeps MVR counselors informed about transitions trainings and news.

I. Hire a transitions program manager to directly serve consumers and to develop transitions practices. Determine if transitions referrals increase.

The 2007 Legislature appropriated funding for a transitions counselor which was hired for the Missoula region.

Since the inception of the project, the transitions program manager has:

Established weekly hours at each of the aforementioned high schools to ensure ease of access for students, parents and teaching staff.

Developed instructional materials on transitions (PowerPoint presentation and article) and presented them to various local, state, and national groups (students, teachers, parents in western Montana school districts: Missoula, Mineral, Sanders, Lake, Ravalli, and attendees of a nationally conducted seminar) in a variety of mediums, including face-to-face group meetings, and the Rural Institute's Newsletter and a nationally conducted "webinar."

Developed succinct "Cooperative Agreement," outlining the roles of both the teacher and the MVR counselor in initiating and carrying out transitions activities on behalf of Montana's students with disabilities.

Produced an online "Transitions Kit" containing the materials described above to guide MVR counselors who serve school districts across Montana.

Participated on the Montana Youth Transitions Project, helping to produce the 2008 Annual Transitions Conference, which had the following number of attendees for each year:

2008	145
2009	165
2010	110

the transitions conference is anticipated to remain an annual event.

The transitions program manager also assisted with development of the Montana transitions website (<http://www.montanayouthtransitions.org/>).

The Program Manager participated on Governor Schweitzer's Transitions Taskforce Committee with the goal of improving transitions services for Montana's students with disabilities.

The following data shows the overall increase in the number of transition age students over the last four years.

Region	2007	2008	2009	2010.
Billings	429	479	520	503
BLVS	55	60	57	68
Butte	471	455	469	490
Great Falls.	298	295	330	391
Missoula	489	540	583	613
totals	1742	1829	1959	2065

The number of transition age students served has increased dramatically over the period presented. It is believed that the increase was impacted by: 1. The Missoula region was impacted by the transitions program manager being in the schools 2. Statewide there was an impact from training and implementation of procedures developed by the pilot project.

J. Create a strategy for improved access in schools.

Many strategies have been implemented related to this issue. As a result of analysis of Missoula pilot project two issues are being focused on in the upcoming year:

Developing cooperative agreements with schools.

Scheduling time for MVR counselor to be in the larger high schools in the state on a regular basis.

K. Develop urban and rural models of transitions services.

The pilot project has developed guidelines.

The Missoula pilot has developed a number of strategies for working with all schools and the transition program manager has passed the information on in a variety of ways.

Also, technology solutions are being implemented in addressing rural issues as described previously in other sections.

L. Serve 20 high school students through MYLF.

The number of participants in MYLF for each year are below:

2007 18

2008 20

2009 26

2010 15

In addition to the actual participants in the program, several past participants return to serve as staff.

During the forum, the delegates developed personal leadership and resource plans. The students are contacted monthly, for one year, by MYLF staff to see if they need assistance in the areas of college preparation, accessibility issues, implementation of their leadership plan, requesting accommodations, applying to Vocational Rehabilitation, and/or self advocacy.

M. Coordinate annually with disability services offices at the university level (regional level).

Each office has procedures for working with the higher education units in their area.

In addition, central office and the state deaf coordinator have been working with the Office of Higher Education and individual universities on interpreter issues.

3. Build awareness and understanding of MVR services

A. Educate legislators, consumers, and the general public on MVR services by sending out quarterly updates through the friends of rehab email list and by exploring TV and radio ads.

The “Friends of Rehab” (the network of individuals and organizations involved with MVR on a consistent basis) were updated on progress on legislation related to MVR, announcing the public hearing, and clarifying some issues that arose at this year’s public hearing.

MVR is working with the Department of Public Health and Human Services on Social Networking strategies to educate the public.

B. Invite at least one business in each region to do a presentation at a staff meeting.

Each office has been doing this on a regular basis and some offices have done site visits to businesses. It is expected that these efforts will continue in the future.

C. Explore the potential of TV/radio ads, maybe collaborating with MTAP.

Efforts were made in this regard, but nothing has been completed at this time.

D. Expand career fair activity in more communities (as an employer and consumer resource).

MVR staff participate in and hosts booths at career fairs, health fairs, and job fairs across their regions on a regular basis.

4. Develop opportunities for better jobs and on-the-job supports for people who are working.

A. Train staff on post-BA eligibility and educational opportunities.

The final policy has been developed and training was provided.

B. Inventory methods of supporting consumers on the job following supported employment closures.

This inventory was completed and reported on in a previous state plan.

The possibility of using work related expenses as a part of the Social Security work incentives as funding resource for long term supports is being explored.

C. Expand resources for extended employment program by asking the Legislature for more funding.

Increased funding for extended employment was passed by the 2009 legislature and reported on in a previous plan.

D. Invite the National Business Network to present at the 2008 All Staff Meeting.

This was not completed because Montana does not have the large national employers typical of partnerships with the network.

5. Enhance MVR services specifically for people with mental illness, brain injuries, and learning disorders

A. Require that each region has a focus group on mental health issues.

This was done in fiscal year 2008 and the results were reported in a previous state plan.

B. Get baseline information on how we serve consumers with mental illness, brain injuries and learning disorders: #26s; wage at closure; service rate; and geographic areas. Develop a strategy to address areas of weakness.

With regard to brain injury, the average wage of successful closures over the course of the three year period went from more than a dollar below the general caseload level to higher than the general caseload level. Because of the small numbers involved when breaking the issue down to

the regional level, there is a significant amount of variation between regions in different years, but over a three year average there is little variation between regions. With regard to rehabilitation rate, the rehabilitation rate has been below the general caseload two of the three years reviewed, but one year was comparable to the general caseload. This should be reviewed for a few more years to have more data to determine trends. There were no consistent differences at the regional level. With regard to 26's any variation between regions was consistent with the variations in cases served.

With regard to learning disabilities the average wage of successful closures is consistently lower than for the general caseload. The Field Chief will review this in more detail and may make this a topic of a regional administrator's meeting. There are no consistent patterns of differences between the regions. With regard to the rehabilitation rate, the statewide rehabilitation rate for individuals with learning disabilities is slightly above the rate for the general caseload. There are no consistent differences in the rehab rate between regions. With regard to 26s, one region had a decrease each of the three years reviewed. Because of a finding related to transitions that was previously discussed the policy related to learning disability eligibility was changed and it is anticipated that this may impact some of the findings mentioned above.

With regard to psychosocial impairments the average wage of successful closures started out lower than the general caseload, but has increased for each of the last two years and is now comparable than the general caseload. There are no consistent patterns of differences between regions. With regard to the rehabilitation rate, the statewide rehabilitation rate for individuals with psychosocial impairments has consistently declined over the three year period. The Field Chief will review this in more detail and may make this a topic of a regional administrator's meeting. There are no consistent differences in the rehab rate between regions. With regard to 26's any variation between regions was consistent with the variations in the number of cases served.

While this was not a specific topic at a regional administrators' meeting, there has been a great deal of staff training in this area.

Also, further review of the issue indicates that the local control of the mental health system in Montana creates inconsistencies across the state in the area of collaboration with MVR on employment issues. This factor probably impacts the data in this area. MVR continues to try to work with the local mental health centers to develop better collaboration.

C. Encourage one counselor from each region to attend the NAMI (National Association of Mentally Ill) conference each year to help develop "pockets of expertise" within the MVR staff. This is being done each year.

D. Focus one state training event (Montana Association for Rehabilitation (MAR) or All Staff) in 2008 on mental health issues. Find models and bring in representatives from successful programs.

In the two previous years of this strategic plan, a significant amount of training has been provided in areas related to mental health, and details were provided in previous state plans.

In the past year, all counselors were trained in procedures to work with consumers to determine if they are ready to become involved in the rehabilitation process. The impact of the training will not occur until the next few years.

6. Collaborate with other appropriate agencies and 121 projects to enhance outcomes for consumers.

A. Write a letter to the Department of Public Health and Human Services (DPHHS) director stating how our needs assessment again identified transportation as one of the highest needs our consumers mentioned.

MVR worked with the director's office to hire a transportation coordinator for the DPHHS.

As reported in a previous state plan, there was an agency reorganization that involved MVR. As a result of the reorganization, the department's transportation coordinator was also placed in the Disability Employment, Independence and Transitions. It is anticipated that this relationship should assist with meeting a variety of performance measures incorporated into the 2011-13 state plan.

B. Stay informed with what is going on with independent living and Montana Transportation Partnership regarding transportation.

On the local level, each office has worked on this issue.

On the state level, the transportation coordinator mentioned above has been involved with working with independent living on transportation issues.

C. Work with 121 projects to determine needs and alignment with MVR. Personally contact the 121 projects and urban Indian programs and ask for input regarding their needs.

An MVR counselor and the Missoula regional administrator are on the Salish Kootenai Rehab Advisory Council.

In the other regions, the local offices have regular meeting with the 121 projects in their area. Collaboration with the projects include joint cases and holding group orientation meeting on reservations.

MVR has current agreements with all of the section 121 projects located in Montana.

In FY 2007, there were 653 Native American cases on MVR's caseload in the counties served by urban Native American centers. In FY 2010 there were 687 Native American cases on MVR's caseload in these counties. There appears to have been an impact related to the contacts with Native American Urban Centers that was mentioned in previous state plan reports.

D. Maintain joint training with 121 projects.

The MVR 121 project liaison will continue to notify the 121 projects about training opportunities such as All Staff, the MAR Conference, CTAT training opportunities, etc. Send the 121 projects any updated information on the MVR counselor manual.

MVR sent notices on the following topics to all six 121 projects:

Job development

Traumatic Brain Injury

Ethics

Autism

Successful job accommodations

Deaf and hard of hearing

Grant Writing

One issue related to training that the Section 121 projects have raised is that they have an insufficient amount of money available for training. MVR has made available to each of the six 121 projects in Montana \$5,000 of ARRA funds that can be used for training. In the past year the projects have used the funds for training in:

Deaf and hard of hearing

Data base systems for case management

Assistive technology

Empowerment of Native Americans with disabilities

E. Continue good relationships with all the 121 projects. Visit each Reservation with a 121 project when invited.

The MVR 121 liaison met with representatives of the Blackfeet 121 project and the Chief Dull Knife College 121 project at the Montana Association for Rehabilitation conference in October 2010.

The MVR 121 liaison met with several representatives of 121 projects during the CANAR conference in Nov/Dec 2010.

The liaison attended Empowerment of Native Americans with Disabilities in April 2010 and met with representatives of several of the Section 121 projects.

A VR Council meeting was held on the Rocky Boy's Reservation in October 2010 and the MVR 121 liaison met with the 121 project staff after the meeting.

The MVR 121 liaison met with 121 project directors (at their invitation) on the Northern Cheyenne Reservation (October 2009), Rocky Boy's Reservation (October 2009), Blackfeet Reservation (November 2009), Fort Belknap Reservation (November 2009), Fort Peck Reservation (November 2009), Flathead Reservation (April 2010), Fort Peck Reservation (May 2010)

F. Provide technical assistance to the 121 projects when requested.

The central office liaison to Section 121 projects has been in contact with the 121 projects to provide technical assistance. Issues where assistance was provided included: Training resources, information on strategic plan development, evaluation, eligibility factors for consumers with chemical dependence, and resources related to becoming an employment program in the Ticket To Work program.

G. Continue participation on federal benefits workshops on Reservations. Attend at least two sessions a year.

MVR has presented at the workshops on the following reservations in the last year: Fort Belknap (April 2010) and Fort Peck (May 2010)

H. Inform disability groups about progress being made on Medicaid Infrastructure Grant.

The Medicaid for Workers with Disabilities was passed by the 2009 Montana Legislature and signed by the Governor. The program went into effect on July 1, 2010.

The Medicaid Infrastructure Grant personnel have been informing agencies of the program.

I. Support inclusion of Medicaid Buy-In in the Executive Planning Process (Governor/state agency planning process for each legislative session.)

This was done and as noted previously the support was successful.

J. Convene the CRP liaison group via telephone conference call four times per year to discuss CRP issues and possible solutions.

We had meetings in January, February, April, and August in 2010.

K. Identify and encourage additional CRP participation.

There have been no new CRPs added during FY 2010.

L. MVR will participate in employer associations such as Workforce Centers, Community Management Teams, and One-Stops.

All offices are members and participate at their local Community Management Teams (some staff are officers) and many belong to the Job Service Employers Council (JSEC).

M. Establish a liaison with Department of Corrections and become familiar with their programs related to disability.

Local liaisons have been established with local programs related to the Department of Corrections.

N. MVR will continue inter-agency cooperation with OPI, Higher Education, and other agencies.

MVR has developed cooperative agreements with multiple agencies as noted in attachments 4.7 (b)(3) and 4.8 (b)(1).

O. Meet with Job Service to understand their new role.

This has been done across the state.

P. Continue participation in local Mental Health advisory councils.

Each region has participation on Mental Health advisory councils.

Q. Invite other agencies (such as Job Service, Mental Health, DD, OPI) to present at a MVR Council meeting.

The Council has heard presentations from two Native American Section 121 projects (Rocky Boy's and Fort Belknap), Summit Independent Living Council, Client Assistance Program, MonTECH, Department of Public Health and Human Services (umbrella agency), Statewide Independent Living Council, Medicaid Infrastructure Grant, Business Enterprise Program, Secretary of State (accessible voting machines), Montana Telecommunications Access Program and MYTransitions.

R. Strengthen networking between MVR and other agencies.

This issue has been covered in a variety of others parts of this plan.

S. Once a year each region will arrange for workforce presentations describing employment trends, living wage and benefits (what's hot and what's not).

Regions have approached this in different ways. However, each Region is addressing the issue.

7. Continue attention to in-service training and meeting CSPD qualifications.

A. Continue to provide in-service training to staff so they continue to be qualified.

Each year, an annual needs assessment is completed by the field staff to assist with determining training needs.

While we will continue to participate in similar trainings, MVR collaborated with the TACE Center to provide our staff with Cognitive Motivational Tools Training, which was recently completed. MVR is anticipating the training will have an impact in lowering the number of status 30 closures. Counseling staff without a masters degree are required to get their masters degree as a condition of hire. MVR will help find a stipend to cover the cost.

Blind and Low Vision instructional staff must also get their master's degree, and MVR pays for their schooling.

The Montana Association for Rehabilitation and Montana Youth Transitions Forum was a combined conference in 2009, with a focus on transitions. Forty-four staff members attended this conference.

Emerging Leaders training was provided to three staff members as part of our effort toward succession planning.

Numerous other trainings were provided as staff members and their supervisors saw the need, especially in the areas of mental illness, brain injury, deafness, and Native American issues.

B. Continue to require professional development plans for counselors.

MVR reviews and updates the professional development plans of staff annually.

C. Continue in-service on new counselor training and other training to remain current on disability trends.

MVR Futures Group developed a new counselor training guide.

The TACE center provides opportunities for training on the web on current trends and staffs are made aware of the opportunities.

Every other month, the trainer position hosts a 90 minute WebEx Training on topics generated by the staff Training Needs Assessment or suggestions from management.

MVR is using of ARRA money to develop a comprehensive curriculum/format for new counselor training.

D. Develop specific training on MVR public law and policy for counselors.

MVR has done a number of trainings related to MVR public law and policy. They have included such topics as Informed Choice and Eligibility Determination. Staff was trained on Rehabilitation History, Legislation, and Philosophy on May 20, 2010.

E. Provide conflict and mediation training for MVR staff including mediation techniques when a counselor has to say no. Also provide training on how to deal with consumers who are in crisis.

MVR is providing the training, "Nonviolent Crisis Intervention" to the regions per their requests. Over the past three years there have been multiple trainings for staff on mental health issues and the topics above have been covered in portions of those trainings.

F. Provide staff with information on employment trends (demographics, labor market, interagency linkages and changes).

Staffs are invited to attend CMT events, and this information is shared at staff meetings.

G. Continue good succession planning program and prepare for upcoming retirements of senior management.

The Futures Group is still providing good experience for people who are interested in moving up in the organization. With significant turnover in management positions in the last year, the Futures initiative proved to be very valuable.

Also, staff have attended the state government training: "Essentials of Management" training. Staffs have also been selected to attend the "Emerging Leader," which is a national training.

H. Continue cultural awareness activities including having a MVR Council meeting on a Reservation, and by sending a counselor to CANAR. Look at the needs of urban Native Americans who do not live on a reservation.

MVR staff continue to attend the CANAR conference to stay informed on Native American issues related to rehabilitation.

Many MVR staff attend the Native Americans with Disabilities Empowerment Conference each year.

#### I. Explore video conferencing for training.

MVR is exploring the potential for video conferencing in a variety of areas including training. MVR recruited a VISTA to assist with the initial stages of planning for these types of activities.

The VISTA member discussed previously trained the staff on using video conferencing. This training included the use of video conferencing software to hold meetings and training. The training also consisted of how to use the different hardware involved in video conferencing which includes projectors, webcams and conference phones.

#### J. Develop a forum for sharing best practices among the counselors such as setting up a column in the newsletter.

This has been done in some regions.

#### 8. Expand our staff recruitment effort

A. MVR will analyze and determine optimal staffing needs considering job placement, transitions, travel, and number of cases.

This is done to some degree on an ongoing basis. Additional staff resources would be necessary to complete a thorough analysis. Also, until the economy improves and conditions are more favorable for increased income for the state general fund, it is not prudent to expect to be able to expand staff at this time to optimal conditions.

B. Enhance recruitment through expanding internships through Futures Group, participating in career fairs and making contacts with universities regarding employment opportunities. Identify potential MVR consumers who are working towards a career in vocational rehabilitation. Provide information on MVR/BLVS as a career to students in high school.

The Billings region hosts internship students. Because internships are not paid and most of the interns come from the Billings area, other regions do not host as many interns as Billings. Many interns are later hired into counselor positions.

The Billings office hosted an intern from Spring Semester 2010, and hosted another intern last Summer Semester.

BLVS has hired trainees into some of their hard-to-recruit instructional staff positions. They then complete their masters degree with MVR financial assistance.

The Havre office hosted an intern from Montana State University Billings. This intern was exposed to a variety of experiences and also assisted with transitions activities along the Montana highline.

#### C. Recruit and hire a Deaf and Hard of Hearing Program Manager in Great Falls.

Bob Ellesch was hired in this position in January 2008

MVR is conducting a pilot with rehabilitation communication specialists to provide more intense services to consumers who are hard of hearing or Deaf.

MVR used ARRA funds to contract with an individual to provide training to MVR staff statewide regarding deaf/hard of hearing issues.

The following activities have been designated for further investigation and have been determined to require additional resources. The feasibility of action on these activities is to be reviewed annually.

1. Make more time available between counselors and consumers.

MVR works on this issue on an ongoing basis. In the past year, consumer handbooks were developed and have begun to be utilized. The handbooks provide consumers with more comprehensive information on the rehabilitation process than previous brochures. It is anticipated that this will be a reference for the consumer and may decrease the time necessary to explain various parts of the process and procedures and allow the counselor and consumer more time for assessment and plan development.

This is an issue of focus in the new strategic plan.

2. Identify all supported employment program goals consistent with the goals described in Attachment 4.11(c)(4), including an evaluation of the extent to which the supported employment program goals were achieved.

- Identify the strategies that contributed to the achievement of the goals.
- Provide a description of the factors that impeded the achievement of the goals and priorities.

MVR continually assesses the need to establish, develop and improve CRPs utilizing all of the methods described throughout attachment 4.11 (a). Among the need areas being addressed at this time include:

1. Expansion of services to rural and remote areas by the continued certification of private providers who meet MVR qualification levels for job placement and job coaching services.

New providers are being developed in the northeastern section of Montana. This is one of the more remote areas of Montana and there has been no CRP services available there for many years.

In a rural community in southwestern Montana, MVR is working to develop another new provider.

The Billings Mental Health CAP team has begun to do long term supports.

2. Expansion of mental health providers as CRP's to serve those with severe and persistent mental illness

MVR continues to work on this issue, but there has been no new providers added.

3. Provide an Assessment of the performance of the VR program on the standards and indicators for FY 2010.

MVR has always been very mindful of the federal standards and indicators and has monitored the development of its performance. Utilizing FY 2009 data, MVR and the Council have assessed the agency's performance in meeting the minimum requirements for standards 1 and 2.

The following is a report of last year's performance related to the Standards and Indicators.

Standard #1: Employment outcomes

1.1 Number of rehabs Federal Requirement: at least as many as in the previous year Montana Results: 716 = 83 less than goal (799) Pass/Fail: Fail

1.2 Percent employed--Percentage of rehabs compared to all people who had plans written and were closed (Rehab rate) Federal Requirement: at least 55.8% Montana Results: 41.9% Pass/Fail: Fail

1.3 Employed competitively--percentage of rehabs who are getting at least minimum wage Federal Requirement: at least 72.6% Montana Results: 94.6% Pass/Fail: Pass

1.4 Significant Disability--Percentage of rehabs who are earning at least minimum wage who are significantly disabled Federal Requirement: at least 62.4% Montana Results: 84.8% Pass/Fail: Pass

1.5 Earnings ratio--Average hourly rate of rehabs who are earning at least minimum wage divided by the state's average hourly earnings for all employed people Federal Requirement: at least .52 Montana Results: .75 Pass/Fail: Pass

1.6 Self supporting--Look at all rehabs who are earning at least minimum wage. This item is the difference between the percent who report their own income as their largest source of support at closure and at application Federal Requirement: at least 53.0 Montana Results: 55.8 Pass/Fail: Pass

Standard 2: Equal access / Minority ratio--service rate for minorities as a ratio to the service rate for non-minorities. Note: service rate is defined as the number of people who exited the MVR program after receiving services divided by the total number of people exiting the program. Federal Requirement: at least .80 Montana Results: .86 Pass/Fail: Pass

MVR has incorporated the standards and indicators into performance appraisals for staff. MVR and the Council will continue to monitor the performance outcomes throughout the year and work to consult with MVR regional administrators to assure compliance in meeting the required indicators. MVR tracks the indicators on a quarterly basis so adjustments can be made in areas that may need some attention.

4. Provide a report on how the funds reserved for innovation and expansion (I&E) activities were utilized in FY 2010.

Title 1 funds being used at this time are to support the Statewide Independent Living Council and the Montana Vocational Rehabilitation Council, which meet four times during the year to conduct business. Expenditures included travel, stipends, supplies, meeting room rental, interpreters, and facilitation services.

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## Attachment 6.3 Quality, Scope, and Extent of Supported Employment Services

- Describe quality, scope, and extent of supported employment services to be provided to individuals with the most significant disabilities
- Describe the timing of the transition to extended services

Supported Employment Definition The Act as amended defines supported employment as: Competitive work in integrated work settings, or employment in integrated work settings in which individuals are working toward competitive work, consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice of the individuals with the most significant disabilities for whom competitive employment has not traditionally occurred; or has been interrupted or intermittent as a result of a significant disability; and who, because of their nature and severity of their disability, need intensive supported employment services for the period, or extended services to perform such work. This also includes transitional employment for persons with the most significant disabilities due to mental illness.

Quality of Supported Employment MVR, through its cycle of services planning process, enrolls providers who will be making supported employment time limited services available. The enrollment process requires that providers have met a set of standards described in administrative rules. This enrollment process ensures that the providers of services maintain the necessary education, skills, and degree of professional expertise to provide a level of service commensurate with MVR's work service standard. MVR values its priority partners who have met the required standards. Supported employment providers evaluated by the developmental disability system or mental health system represent the majority of our providers. CARF (Commission on Accreditation of Rehabilitation Facilities) is also utilized by providers. Other providers are individuals who have been selected to provide services for a limited number of consumers in a rural area where there are no established providers.

Scope of Services The scope of services available may include one or more of the following services depending on the individual's needs: Vocational Evaluation/In In-House Vocational Evaluation/Community Based Supported Employment/Extended Support Services Supported Employment/Developmental Disabilities (DD) Supported Employment/Mental Health (MH) Supported Employment/Other Follow-Along Extended Support Services Job Placement Services/Job Finding Extent of Supported Employment

An individual shall be eligible to receive supported employment services using Title VI Part B funds if: 1) The individual is eligible for vocational rehabilitation services. 2) The individual is determined to be an individual with the most significant disabilities; and 3) There is comprehensive assessment of rehabilitation needs of the individual including an assessment of rehabilitation career and job needs, and identifies supported employment as the appropriate rehabilitation objective for the individual.

Cooperative Agreements: When a goal requiring supported employment is identified in the IPE, a document (cooperative agreement) signed and dated by the extended service provider reflecting the commitment of extended service provisions will be placed in the file prior to closure. If the cooperative agreement is dated after the IPE, there must have been reasonable expectation that extended services were to be available prior to closure. Funding extended support services prior to closure: For the 90 days preceding closure, the extended support services provider must have met the individual's support needs without MVR time limited funding. MVR provides time-limited services needed to support an individual in employment. MVR can fund a maximum of

18 months of job coaching and follow-along services unless the Individualized Plan of Employment (IPE) indicates that more than 18 months of services are necessary for the individual to achieve job stability prior to transitioning to extended support services. Prior to the purchase of supported employment services, the need for services, the appropriate extended support services and funding, and the appropriate agency to provide the services are established and identified on the IPE. The MVR counselor secures a signed cooperative agreement from the provider to guarantee ongoing support. Supported employment services are available statewide.

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