

Montana State Rehabilitation Council
Virtual Meeting
February 25 & 26, 2021
Meeting Minutes

Members present: Barbara Davis, Scott Eychner (Friday), Chanda Hermanson, Kathy Hampton, Renea Keough, Eliza Kragh, Michele Letendre, Dr. Tom Manthey, Denise May, Kathy Meier, Cheri Reed-Anderson, Marcy Roberts, Emma Rooney (Thursday), and Tom Sullivan.

Members absent: Monique Casbeer, Dale Kimmet, Sandy Taylor, and Marvin Weatherwax, Sr.

Staff and guests: Lacey Conzelman, Anna Gibbs, Bill Harant, Brook Hodge, Tammy Hogan (Friday), Mark Mahnke (Friday), Jean Schroeder (PTI Coordinator; sit in for Sandy Taylor) Sarah Seltzer, Shawn Tulloch, CART transcriber, and two sign language interpreters.

Welcome and Introduction: Council Chair, Marcy Roberts, called the meeting to order. Shawn Tulloch reminded the Council of ground rules for the virtual meeting. Introductions were made.

October Meeting Minutes: Motion made to approve the October 6 & 7, 2020 Meeting Minutes unanimously.

Announcements: Shawn Tulloch will continue to work with Montana Public Network to get the captions inserted in the VR100 Celebration from last October. Tom Manthey announced that MSU-B received a grant to set up an Institute for Neurodiversity and will be hiring an executive director and staff for the Institute.

Public Comments: n/a

What Shapes Health and Well-being Survey by Mathematica for Robert Wood Johnston Foundation, Kathy Meier: The purpose of this survey is to find out what leaders in this country think are the drivers of actions and policies that promote health and well-being in Montana. Kathy created Survey Monkey for the Council members to answers. Shawn will fill out the survey based the answers and submit it to Mathematica.

Federal & State update and Legislative Session Update, Chanda Hermanson, DET Division Administrator reported that the Disability Innovation Fund (DIF) is a fund to support people with disabilities in an

employment setting outside of the vocational rehabilitation program. This allows us to give additional support to people who had existed the program (such as career advancement). Chanda talked about the Rehabilitation Service Administration monitoring VRBS's work in 2017 that gave us a list of items to work on such as internal controls, procedures & policies written down, certain timeline, eligibility, and so forth. DPHHS has a new director, Adam Meier, who started about three weeks ago. Legislative Sessions have started, and we gave our public testimony to the subcommittee on appropriations on January 28th. We are continuing to accept applications and we have several active IPEs. The number of people in Category One is decreasing which means we are considering opening the Category One to start services. Category Two and Three will remain closed (still a waitlist). A question was asked that how it was determined to place a client in a category. It was based on the client's functional limitation skills, not just the disability itself. If the client receives SSDI or SSI and has some functional limitations, the person would be placed in the Category One.

Budget Report, Anna Gibbs, Bureau Chief of Program Support & Operations, reported on the federal grants and state funds. For the federal fiscal year 2020 (FFY20), we received a federal grant of \$9 million and state general fund of \$2 million. The VRBS program spent about \$6 million which leave about \$7 million to be carried forward to the next federal fiscal year 2021 (FFY21). We are in the FFY21. We received a federal grant of \$12 million; 15% of that grant is \$1.9 million is set aside for the Pre-Employment Transition Services (Pre-ETS). The State General Funds is \$3.4 million. Both funds bring to a total of \$16 million. So far, the VRBS program has spent \$2.7 million. The goal of the program is to carry forward about \$7 million from the FFY21 award into the FFY22 when we are expecting a large Maintenance of Effort penalty. The VRBS program also received income for reimbursement of VRBS services provided to clients that are SSI and SSDI recipients under the Ticket to Work program. The VRBS program received \$1,245,362 in the State Fiscal Year 2020 from 7-1-19 to 6-30-20 and \$587,056 in State Fiscal Year 2021 from 7-1-20 to present. Anna also reported on the Summary of VR Program Participants which is what RSA summarized the data in the program year of 2020 in the first quarter (July – September 2020). The total participants in this summary is 1,669. It also shows the different race/ethnicity, age, gender, type of services, barriers to employment, Pre-ETS services, and the exit data. One new item that was added to the summary is the sustaining employment after exit from VR program. Anna talked a bit about the operating costs for SRC. She announced that the name has officially changed from Wellsky (which is the name of company creating the case management system) to Madison. Madison River is the tributary of three rivers joining together; Our Madison will have BLVS, VR, and Pre-ETS programs working together.

Field Services Update and Virtual Job Shadow Demo; Brook Hodge, Bureau Chief of Field Services, reported that all positions are filled except for two positions in Havre VR office (Pre-ETS Specialist and Counselor Supervisor). Mark Mahnke, the Business Services Specialist, will be retiring at the end of March. For the VR counselors, the average caseload size is about 60; some field offices are managing 80 to 100 cases. Billings, Helena, and Missoula continue to be the busiest offices. Counselors are meeting with clients remotely. They are investing their time to increase networking and building relationships with our community agencies and partners. The counselors are also participating in the VR 101 project through George Washington University. This is 7-training modules covering several topics such as VR history, eligibility requirements, IPE developments, etc. In addition to the monthly VRBS training webinar, the staff participated in the 8:30 am Coffee Chats; the topics are random. There are classes offered by the State's Professional Development Center. Some of our newer counselors are working with Sarah Seltzer, Quality Assurance Officer, on their Comprehensive System of Personnel Development (CSPD) which is an agreement between the staff and the agency. VR counselors are required to obtain a master's while in training. For every year, RSA pay for the graduate school, the employee commits two years working for the agency. Brook is requiring all staff to join one of the VRBS teams (Assistive Technology, Quality Assurance, Business Service, Customized Employment, etc.). Brook talked about the different components of the Case Review Instruments (date, status, documentation, eligibility, OOS, IPE, Pre-ETS, Support Employment, financial management, program exist, employment outcome, and case evaluation) and it shows scoring system which indicates what areas to work on. The Performance Appraisal form for all the staff in the agency is done yearly and covers different areas (communication, teamwork, organizational skills, professional conduct, and performance expectation). Brook showed another form, New Counselor Training Markers, which has rating competency of learner, development area, capable, strength, and expert. It covers the competency in explaining VRBS and services, counseling skills, and a box for any comments. Brook ended her report with a Virtual Job Shadow demo.

Consumer Satisfaction and Needs Assessment (CSNA); Lacey Conzelman, VRBS Program Manager, reported that CSNA is a 3-year process of collecting data. We get feedbacks, comments, and questions from the public in town hall meetings. We host Focus Forums by meeting with specific groups of people who are stakeholders in the vocational rehabilitation program. We meet with our partners in the Department of Labor. We meet with individuals in the Developmental Disabilities programs, Disability Rights Montana, our providers, students, partners in the 121

programs. We ask them all questions and gathered their feedbacks and comments. We send out surveys to those exist VR programs. After three years of collecting the data, we write a report and send to Rehabilitation Services Administration (RSA) which is our federal partner for Montana VRBS. Then Lacey show a newer version of the survey for the individuals in Pre-ETS. It is a multiple-choice type of survey.

Blind and Low Vision Services Update; Sarah Seltzer, interim Administrator of BLVS, reported that Darrel Hannum, the new Bureau Chief for BLVS, will start on Monday. Beverly Berg already submitted the Older Blind report to RSA – a copy has been sent to the Council members. About 312 individuals were served in the Older Blind program last year. The Business Enterprise Program (BEP) is authorized by the Randolph-Shepherd Act which allows blind or visual impaired to set up vending machines on federal and state property. With the COVID restrictions, many federal and state employees have gone to remote working which hurts the vending businesses. RSA recently released relief funds to help compensate the losses. The new CEO of the Montana BEP will discuss on how to account for the financial losses and how to distribute the funds. Another piece of news is the new Madison case management and recording the older Blind inventory. Every year, Beverly did the inventory of all items and the current case management does not do the inventory. But the inventory can be done in the new Madison system. Sarah also reported that four of the BLVS staff are completing the Work Incentive Certification which allows us to have in-house benefits planning.

Reports from Committees:

- Education & Membership, Denise May:
 - Membership on the Council:
 - One vacancy for Disability Advocate and three vacancies for Business, Industry, and Labor.
 - Two members have been absent in the last SRC meetings; will follow up on them.
- Planning & Review, Barbara Davis:
 - Created a rubric to review the success stories
 - Have 15 BLVS stories, 21 general VR stories, 6 Pre-ETS stories, and 1 tribal story
- Consumer Satisfaction & Needs Assessment, Bill Harant:
 - Discussed on the components of the Pre-ETS survey.
 - Discussed on the history and the process of doing the survey
 - Pre-ETS survey is done and already approved last October. The survey for general VR is being worked on. The survey for BLVS has not started yet.
- Policy, Procedure, & Personnel Development, Brook Hodge:

- Discussed on general agency updates; MT Disability Rights received several phone calls about Ticket to Work – there is a need to get our staff training on this.
- Discussion on the procedures: Windmills Delivery, Comprehensive System of Personnel Development, Gathering & Recording High School Report Cards & Diplomas for MSGs, and Public Transit Travel training.

Panel of VRBS Teams:

- Pre-ETS, Tammy Hogan, Pre-ETS Bureau Chief:
 - Tammy informed the Council that there is a Youth Service Team and the council members are welcome to join the team.
 - Tammy talked about her Pre-ETS team, five Pre-ETS specialists in different field offices and one Pre-ETS data technician in Great Falls VR office. There is an opening for a Pre-ETS specialist in Havre.
 - The WIOA in 2014 requires VRBS to set aside 15% of the federal fund for Pre-ETS. These services are for students with disabilities between 14 to 21 years old in high school, college, or other recognized education programs. The five specific services are job exploration counseling, work-based learning experiences, counseling on postsecondary programs, workplace readiness training, and instruction in self-advocacy.
 - Due to COVID restriction, the Pre-ETS team have been thinking outside of the box to continue to serve the students. Both VR counselors and Pre-ETS specialists are doing the career exploration, workplace readiness and self-advocacy instructions with the students. They also used Virtual Job Shadow. They pay Community Rehabilitation Programs, Independent Living programs to provide services to the students. Some schools enter a contract with us to receive funding to provide Pre-ETS services. They also fund specialized programs such as Montana Youth Leadership Forum, MT Youth Transitions Conference, and Movin'On program.
 - They have contracts with 42 schools to provide services. If a student is not in one of those school, services can still be provided for them with a Pre-ETS specialist.
 - Pre-ETS team had a chance to spotlight their program with the WINTAC presentation.
- Quality Assurance, Sarah Seltzer:
 - Sarah has been on the job since last October. When the two-year of hiring freeze lifted, she has been busy filling many vacant positions. This is a necessity as we will go forth with opening the Category One to serve more clients. With many

new staff, there are training such as VR 101 that covers several components of the VR program. She hired Mike Beers and John Howard from Summit Independent Living for the Disability Etiquette Training. Sarah is working on a Disability Level Order training for the staff coming up in March and Case Note Documentation training later in the year. There will be some Foundation training plan for the staff and training for supervisors on how to use performance appraisals.

- Regarding the CSPD, there are four staff actively enrolled in graduate programs. They are taking online classes and using RSA scholarships to cover the costs.
- Sarah talked about Team Q as one of the VRBS teams. Council members are welcome to attend the Team Q monthly meetings. Sarah also talked about how each field office have own presentation materials. Team Q will be reviewing them in hope to make them consistent information.
- Business Service and Self-Employment, Mark Mahnke:
 - Mark remind the Council that any members are welcome to join the either teams. Business Service was formed in 2016 due to WIOA which says job-driven or demand workforce development. Not only we work with clients with disabilities, we also see business as a customer. We contact the businesses to find out what are the demands. Getting that kind of information will help prep clients with disabilities to get jobs. There are counselors and support staff on the team. Mark meet with each person on the team to find out what is going on in the community/ businesses, to coach and support their efforts. There are monthly meetings for the team members to share what is happening. Some examples of what team members do: tour of the facility, go to job fairs, maintain regular contacts with businesses in the community, and visit the Chamber of Commerce. Mark is the point of contact for CSAVR National Employment Team. He writes monthly newsletters. He also coordinates training including Windmills (disability awareness).
 - Self-Employment was started last summer in 2020. This is to advise and to support counselor on how to get started with self-employment for a client with disability. The team will look at the individual's background and skills, the plan, action steps, etc. Mark is working on self-employment procedure.

Employer of the Year Award discussion: The Council wants to keep this separate from Montana Association for Rehabilitation's Employer of the Year award. A committee has been formed (Michele, Tom S., Shawn, and Cheri) to research on this and report on it the next time Council meets.

Wrap-Up:

- Next SRC meeting date:
 - With SILC, May 14th
 - SRC only, May 15th
- Agenda items:
 - Panel of VRBS Teams:
 - Assistive Technology Team
 - Customized Employment Team
 - Deaf and Hard of Hearing Team
 - Policy and Procedure Team
 - Committee Reports
 - Joint Meeting of SRC & SILC
 - The chairs will decide the agenda items