

Montana State Rehabilitation Council Meeting

Butte, MT November 8-9, 2023



Meeting Minutes

In Attendance: Barb Lowney, Brian Tocher, Brook Hodge, Carlos Ramalho (virtual attendance on 8th only), Celina Cline, Chanda Hermanson, Corinne Moore, Darrel Hannum, Doug McElroy, Gabrielle Broere, Jean Schroeder, John Gorton, Joleen Weatherwax, Kathy Hampton, Kendra Joyce, Lacey Keller, Lacey Conzelman, Marcy Roberts, Sarah Seltzer, Shandra Bell, Tammy Hogan, Wes Feist

Absent: Tommy Roberts

Staff and guests:

Ground rules reviewed. Mission Statements/Vision Statement read aloud. Introduction made around the tables. May 2023 meeting minutes approved.

Announcement:

Meeting minutes from the August meeting were approved by all.

Public Comments:

No Public Comments.

Reports from Committee:

• **Planning & Review Committee, Marcy Roberts**

Marcy reported that they did meet as a committee. She displayed the draft of the Governors Report on the screen to review. At the time of the meeting they were waiting on data to be included in the report. Lacey was going to add photos in the report. Wes brought up at the meeting showing 3-year data progress. Wes reported that when he brings this information to the commissioner of the departments that he mentions the comparison of data due to it showing significant positive comparison and information like lower unemployment rates. Chanda mentioned that this information will hopefully be helpful to show lawmakers in the session 2025 if it continues to show positive progress. Marcy reported that the photos in the report this year are actual Montanans in the

workforce who are living with a disability. Based on feedback from SRC and looking at the satisfaction survey data the report was to be edited as needed by the subcommittee.

- **Education and Membership-Bylaw changes/edits, Emma Rooney**

This committee did not meet. It was previously headed by Emma who has now stepped down from the committee. Membership updates were pulled from the previous meeting minutes. We had two new members join and two leave, so there are currently two vacancies reported by Lacey. Marcy suggested updating this on the website and Lacey was going to do so. Corine asked if there was a job description for the SRC members. Marcy went through new member orientation. Corine will take on the role of heading this committee. Other open positions were discussed including the Advocacy Committee and a representative position. Wes reported that he is also moving to the Department of Administration so his position with the Labor and Industry will also be open. All position openings to be updated on the website and work to be filled.

- **Consumer Satisfaction & Needs Assessment, Celina Cline**

Celina reported that the committee met and are still working toward the satisfaction survey and how best to navigate them. Lacey was able to get ahold of synergy for a contract proposal. Celina reported that it would be \$60,000 a year. If you do a 3 year contract it would be a little less. It was discussed to try for a year and make sure it works before committing to 3 years. They also discussed asking other states what they do and how they cover these costs. Wes suggested that there may be ways to cost share this expense since it is beneficial to many organization groups. He was going to look into some options. The committee was going to look into additional options that may be more cost effective for the survey and what other states are doing.

- **Policy, Procedure, & Personnel Development, Brook Hodge**

Brook reported that this committee met and discussed what the purpose of this committee really is to make sure we are doing adequate work. The role is to cover all policy and procedure changes with VR. The committee identified 6 primary focus areas. The first was reviewing VR client assistance program referrals. Brook reported that there is a financial aid

issue with clients and getting this from VR. This is being addressed and worked toward fixing. There are also some issues with VR clients and misdemeanors.

Gabrielle mentioned that she would explore how she and her peers at the law firm could potentially support this. The next focus area was updates on recruitment and retention and what is being done to address this. This committee also talked about reviewing policies and procedures VRBS is working on and the easiest way to access those. Wes suggested reviewing these on a quarterly basis to make it less overwhelming due to the significant amount of policies and procedures. Lastly the committee talked about looking into caseload numbers and how that area of VR can be supported.

SRC Vacancies, Lacey Keller & Gabrielle Broere:

Lacey reviewed the meeting and procedure forum. Due to many SRC members starting right around COVID and meetings happening there was some confusion so she wanted to make sure that we were completing all meeting procedures properly. All meeting procedures were reviewed. Doug reported that although it is nice to have the online accommodation for meetings, he does believe that it is important that we try to encourage in-person attendance as much as possible for relationship building and involvement. The policy of in-person or virtual attendance and what will be accepted by the board was to be reviewed at the round table to decide in what way would be best to continue this.

NCSRC Conference Update, Corinne Moore:

Corinne reported having a great time at the conference. That the activity was amazing. The keynote speaker on the second day was Lorenzo Brown. He was shot in the neck at 17 years of age and now is the Executive Director of a great foundation. At the conference they talked about SRC consumer satisfaction survey and why that matters. They also talked about their ROI model and validity and reliability.

Tribal VR Trip Update, Joleen Weatherwax:

Joleen reported that she went for a week tour of the tribal voc rehab programs. She started in Rocky Boy. They then went to Fort Peck after Rocky Boy. They had a lunch meeting in Fort Peck. In Rocky Boy they met

with the acting director Peggy Myers. There is a quick turnover in tribal VR programs a lot of times so Peggy was moving out of her position and they also met with the new director. Joleen shared about the things that are done in her programs and asked about their programs. The other programs shared their perspectives and forms with her as well. Ways to retain counselors was discussed and Joleen's history in VR. She also reported on the importance of serving the client and getting their needs met as quickly as possible. Joleen reported on the tribal VR grants and some of the challenges that tribal VR faces. Joleen will visit Fort Belknap next.

Deep Dive: VR Staff & Retention, VRBS Staff:

The focus of this discussion was on retention and staffing. Sarah reported that the progress they have made is using hand shake. They are sharing opportunities through this platform to recruit eligible candidates. She tries to connect their information/opportunity streams to programs with RSA scholarship funds and RSA masters and rehab counseling programs through hand shake. Sarah reports that after about a 6-month "dry spell" on applications they have seen increases of applications coming in. Brook reported that they can now offer pay raises for counselors and supervisors. She also reported that they have now been able to fill four of the vacant supervisor positions. They are also recruiting through MSU Billings. They are also hoping to recruit some more interns. Sarah reports that building a good network of people has helped their efforts to recruit. They also reported on traditionally using a leadership team amongst the staff to manage challenges throughout within the schedule, caseloads, and staff. Brook reported that they had an executive leadership meeting in Helena and stated that the main topics were around recruiting and retaining staff.

Butte Challenges Round Table, Cassie Wick:

Cassie reports that she has been in Montana for 14 years. She is grateful for her work in the field. She is the Independent Living Specialist. She enjoys how it has allowed her to look at her community and what systems change needs to happen to the physical build environment, to programming, to the way they are being inclusive to people with disability. She went over some of the ways that they work to serve the community and the community members. They have snow shoveling program in the winter run by volunteers. She also talked about forming disability networks

in communities throughout the state. They hosted a “Speaking Our Truth” event where they invited 10 people to tell their stories and between each story there was a video shown about how to talk for humanity and solving problems. She shared that they have an ADA committee and the work they do to help make the community more accessible because there are deficits in accessibility.

They are also working on starting a podcast to share individuals stories. She also shared about the challenges of transportation in Butte.

Member Moment, Marcy Roberts:

Marcy shared that she had wanted to be an attorney when she graduated from high school and that did not work out for her. She went to FCC and got her associate’s degree. She was a mental health specialist at a mental health treatment center to start. She was laid off due to low census. Job services paid for her bachelor’s degree after she decided to go back to school. She worked at Western Montana Health Center as a vocational specialist. She was a CRP after that for 18 years and built a self-employed business as a CRp. She always carried a large caseload. and served many different areas of people and population groups. She believes that not becoming an attorney was a good thing in the end and was really just her passion to advocate for people which she gets to do each day.

Federal & State Report, Chanda Hermanson:

Chanda reported that there is no new information to share for the federal report and moved right into the state report. She showed the Department of Health and Human Services Organizational chart. She broke down the chart and where organizations/services fit within the structure. She reported that having direct contact with the director has been beneficial as well.

Budget Report, Anna Gibbs:

Anna reviewed and referred to the following shared documents below for this report.

State Rehabilitation Council

To: State Rehab Council Members

Date: November 8-9, 2023

RE: Vocational Rehabilitation and Blind Services Budget Report SRC Full Committee meeting

State Fiscal Year 2022												State Fiscal Year 2023												State Fiscal Year 2024											
FFY 22 Grant \$11,084,507												FFY 23 Grant \$13,168,208												FFY 24 Grant (unknown)											
State Share \$3,000,000												State Share \$3,563,950												State Share estimate unknown											
Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sept 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24
												Carryforward of FFY22 Grant												Carryforward of FFY23 Grant											

FFY 2022 Award

Our **FFY22** award was originally \$6,003,734. In August 2022, we applied for and received Reallotment* in the amount of \$5,080,773. Together, this brought our total federal award to \$11,084,507. This resulted in a Pre-Employment Transition Services (Pre-ETS) set-aside requirement of \$1,662,676 which left \$9,421,830 for General VR. The required State Share was \$3,000,000.

The breakdown looks like this:

\$ 9,421,830	Federal Grant Funds (for General VR)
\$ 3,000,000	State General Funds
\$ 1,662,676	Federal Pre-ETS Set-Aside
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\$ 14,084,506	Total Budget

The VRBS program expended **100%** of the **FFY22** grant as of September 30, 2023 as follows:

\$ 9,146,987	Federal Grant Funds (for General VR)
\$ 3,000,000	State General Funds
\$ 1,937,519	Federal Pre-ETS Set-Aside
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\$ 14,084,506	Total Expenses

FFY 2023 Award

Our **FFY23** federal award is \$13,168,208. This results in a Pre-Employment Transition Services (Pre-ETS) set-aside requirement of \$1,975,231 which leaves \$11,192,977 for General VR. The required State Share is \$3,563,950.

The breakdown looks like this:

\$ 11,192,977	Federal Grant Funds (for General VR)
\$ 3,563,950	State General Funds
<u>\$ 1,975,231</u>	<u>Federal Pre-ETS Set-Aside</u>
\$ 16,732,158	Total Budget

The VRBS program expended \$4,849,477 of the **FFY23** grant as of September 30, 2023 as follows:

\$ 1,250,879	Federal Grant Funds (for General VR)
\$ 3,571,246	State General Funds
<u>\$ 27,352</u>	<u>Federal Pre-ETS Set-Aside</u>
\$ 4,849,477	Total Expenses

Ticket to Work:

The VRBS program receives program income for reimbursement of VRBS services provided to clients that are SSI and SSDI recipients under the Ticket to Work program. The Ticket to Work reimbursements we collected in Federal Fiscal Year 2021 from 10-1-20 to 9-30-21 totaled **\$1,024,175**. The Ticket to Work reimbursements we collected in Federal Fiscal Year 2022, from 10-1-21 to 9-30-22 totaled **\$951,136**. The Ticket to Work Reimbursements we collected in Federal Fiscal Year 2023 10-1-22 to 9-30-23 so far totaled **\$1,821,602**.

Frequently Asked Questions?

Where does the money come from to run VRBS and why does the State and Federal Fiscal Year matter?

State appropriations (budgets) are assigned on a biennial basis through the legislative process and run on a state fiscal year (SFY) beginning July 1 of

one year through June 30 of the next year. The SFY designation is the year that June 30 falls in. For example, State Fiscal Year (SFY20) runs from 7-1-19 to 6-30-20.

Federal grant awards (cash) are funds awarded by the Federal Department of Educations' Rehabilitation Services Administration (RSA) for the operations of a VRBS program. Federal grant awards are granted on the federal fiscal year (FFY) that begins October 1 of one year through September 30 of the next year. The FFY designation is the year that September 30 falls in. For example, Federal Fiscal Year (FY20) runs from 10-1-19 to 9-30-20.

Because the FFY and SFY run on different time frames this results in two FFY awards being utilized in one SFY. The program must estimate costs for each FFY that falls within each SFY and how much state appropriation (budget) authority is needed for those costs.

How does RSA determine how much to give Montana?

Funds are distributed to states from RSA based on the statutory formula based on population and per capita income to determine the amount of Federal funds made available to states for VR program purposes. Then, if Montana has any penalties, such as a Maintenance of Effort Penalty, that amount is deducted from the grant before it's awarded.

How much money does Montana have to contribute to this amount?

The state's share is 21.3 percent of the total program cost.

For example, – If the total program costs are \$10,000,000, Montana's State Share must contribute \$2,130,000 with the Federal Share being \$7,870,000.

*What is Reallotment?

Every year, RSA has extra funds because not all the states can fully match and use their original VR federal grants. Therefore RSA allows states to apply to get a portion of these funds, if they choose, usually in August each year. This process is called "Reallotment," where RSA reallots some funds to other states if they meet the application criteria. The state must affirm

that they have the 21.3% to fully match any amount for which they apply. For example, if Montana applies for \$2,000,000 in Reallotment (federal funds), we have to confirm we have an additional \$541,296 of state funds to match the federal contribution.

**What is the Maintenance of Effort (MOE)?

By law, states must “maintain their effort” every year towards the state contributions to a VR program. If a state fails to do this, they will be penalized in subsequent years for their failure to do so. For example, if Montana state funds contributed \$5 million towards VR program costs in 2016, \$3 million in 2017, and \$3 million in 2018, the state failed to “maintain their effort” in 2017 and 2018. Therefore, in 2019, RSA would penalize Montana by \$2 million to their 2019 federal grant because of this failure to maintain their effort.

What is Carryforward?

In some circumstances, a state can carry forward funds from one federal grant year to another, if it has fully expended its state share. So for example, consider a State’s Share to contribute in 2019 was \$2 million with a \$9 million Federal Share, but the program only expended \$6 million total that year. The program would have to show \$2 million was fully spent from state money and \$4 million of the federal money in order to carry forward the remaining \$5 million of federal dollars into 2020.

FFY22 Award	Federal Fund	State Share	TOTAL
Personal Services	\$ 3,299,622	\$ 2,005,080	\$ 5,304,702
Non- Personal Services	\$ 3,132,435	\$ 700,009	\$ 3,832,444
Client Services	\$ 4,653,450	\$ 294,911	\$ 4,947,361
Total Expenses	\$ 11,084,507	\$ 3,000,000	\$ 14,084,507
Remainder	\$ -	\$ -	\$ -

FFY23 Award	Federal Fund	State Share	TOTAL
Personal Services	\$ 143,478	\$ 1,721,572	\$ 1,865,051
Non- Personal Services	\$ 994,974	\$ 838,468	\$ 1,831,442
Client Services	\$ 139,779	\$ 1,013,206	\$ 1,152,984
Total Expenses	\$ 1,278,231	\$ 3,571,246	\$ 4,849,477
Remainder	\$ 11,889,977	\$ (7,296)	\$ 11,882,681

VRBS Report, Brook Hodge:

Brook reported that VR is recruiting an internal position for support staff. It will be called the Admin Support Team Lead. The position will focus on new admin support, facilitating two of the admin teams, and leading the admin support team. They will work with the data and fiscal unit to assist with projects. VR is also focusing their recruitment efforts in Billings, Bozeman, and Butte where they have openings. They are also putting together weekly trainings. They are continuing their monthly all staff presentations. She opened up the floor for training ideas from the council. A benefits planning crash course was suggested for training opportunities.

BLVS Report, Darrel Hannum:

Darrel reports that much of their outreach has been participating in the WIOA partner meetings all across the state, mainly focused on job services and then VocRehab as part of that and re-engaging those core partners.

Darrel reports that they have been doing a lot of traveling this year. He reports that they finished their last WIOA partner meeting in Great Falls. They had seven of these meetings all over the state. These were focused on getting back connections with partners that had been lost after COVID. One of the areas he focused on re-educating partners with was vision services.

Darrel updated the team on new positions and current position responsibilities within BLVS. Trainings are continuing to be a much

requested service from BLVS. Reported again on the Great Falls job service Great Falls College and ADF in Great Falls putting on a six-week training for certification on the employment of ADF. They also attended a MAR conference and Cheri was able to award the MAR employer of the year award. BLVS also provided business training to the VR techs in Great Falls.

Pre-ETS Report, Tammy Hogan:

Tammy reviewed that Pre-ETS has the purpose of helping students with disabilities have an introduction to work. Get them an early introduction of job responsibilities and job exploration. The core services are job exploration, counseling, work-based learning experiences, counseling on post-secondary programs, workplace readiness training and instruction in self-advocacy. The number of students that received PRE-ETS services for the year of 2023 was 2212. The number of those eligible that are not a VR client was 1,860. The number of students that applied for CR was 352.

Tammy reported on some of their spending challenges and not spending enough of their federal requirement. They missed the mark by \$40,000. The other challenge she reported on was the credential attainment rate. They are working on this as a state and seeing students who are applying early for CR services in their high school career. They met with their contract specialist meet with them about the procurement and contracting process and the roles and responsibilities that come along with that. She also reported on some exciting opportunities in future are their camps and Reach Higher. Last summer they Pre-ETS partnered with Montana Empowerment Center to provide IEP bootcamps around the state. It was a busy time for all Pre-ETS specialists working toward gaining contracts with schools around the state. A lot of new schools were coming on board.

Extended/Customized Employment, Lacey Conzelman:

Lacey reminded the committee that the extended employment program is a VocRehab program that our clients transition into when they need long-term support to maintain or advance employment. This program is not funded through the VR grant but goes through the state general fund money. The program is currently serving about 260 clients. Last year they did spend all of their budget and some additional so they are monitoring

spending more closely this year. Lacey reported that for Customized employment she would recommend inviting Cheri Anderson to the next SRC meeting to report on this program more in detail. She oversees this program. The program is transitioning to in-house training for customized employment. Cheri received materials from Minnesota VR for their training program for customized employment. Cheri is working to adopt those practices to the Montana program.

Planning for Next Meeting, Lacey Keller & Gabrielle Broere:

- **Next SRC meeting: February in Red Lodge, MT on the 8th & 9th**