

**Montana State Rehabilitation
Council Meeting
Helena, MT
May 11, 2023
Meeting Minutes**



Members present: Gabrielle Broere, Wes Feist, Kathy Hampton, Chanda Hermanson, Kendra Joyce, Lacey Keller, Barb Lowney, Mike Manhardt, Doug McElroy, Corinne Moore, Marcy Roberts, Tommy Roberts, Jean Schroeder, and Joleen Weatherwax. On Zoom: Celina Cline, Carlos Ramalho, and Emma Rooney.

Member absent: John Gorton, Tom Manthey, and Brian Tocher

Staff and guests: Eva Belatski, Desiree Dean-Kaldor, Tal Goldin, Tammy Hogan, Andrew Lowney, Hannah Stokes, Allyson Talaska, Sarah Seltzer, Shawn Tulloch, and two sign language interpreters. On Zoom: Lacey Conzelman, Anna Gibbs, Darrel Hannum, and CART transcribers.

Welcome, meeting rules, reading of mission statements and announcements. Meeting Minutes February 9, 2023 approved.

Announcements:

Wes Friest made an announcement that he represents the State Workforce Innovation Board. This board is used to advise the governor on workforce and economic development opportunities. The board has been housed within workforce services division at the Department of Labor and Industry. To give the board more opportunity to expand beyond strictly the division at the Department of Labor and Industry, the commissioner has decided to move it directly to the commissioner's office. With close collaboration with Chanda and SRC Wes believes the commissioner will see the value of helping individuals with disabilities find employment.

Kathy Hampton next asked to revisit the discussion about caseload that took place at the SILC meeting the day before. She asked how large of a caseload VR counselors are expected to take on. The group was informed that they are expected to take on a caseload of 150 people but no one currently has that large of a caseload at this time. Kathy shared that she has been getting feedback from clients that now that the waitlist is gone it is taking extra long for VR clients to receive services from their counselors. Chanda stated that this is part due to how much data points VR counselors are now having to report on. The VR office is working on resolving these issues through many strategies.

Member Moment, Corinne Moore.

Committee Reports:

- **Planning & Review, Marcy Roberts**
 - Governors Report Update
 - Talked about people with a term that will soon expire
 - Wes-shared that they doing trainings across the state for all program partners
- **Education & Membership, Emme Rooney**
 - Everyone is formally appointed by the governor
 - Finding a process for appointment that works better and is more streamline
 - 2 spots open for disability advocates on the council
- **Consumer Satisfaction & Needs Assessment, Celina Cline**
 - Getting more clients to respond to the survey
 - Lacey gave update on surveys (sharing a card with QR that goes out instead of physical survey, only 1 response from each month January-April)
 - Surveying will be contracted out in the future so that there can be more focus on how to get more responses
- **Policy, Procedure, & Personnel Development, (name)**
 - This committee did not meet.
- **Employer of the Year Award**
 - Not an active group at this time

NCSRC Update, Lacey Keller & Gabrielle Broere

Lacey talked about how we did not send an SRC member to attend the SRC conference. Lacey stated how important it is that we have a member go to conference to represent our SRC. Wes reported that he attended the SRC in October to the CSAVR. Chanda spoke about the layout of the week for SRC. Saturday, Sunday national council state of rehabilitative counselors have conference and then Monday starts the CSAVR. Preference would be that the SRC member attend at least the NCSRC and the CSAVR.

Wes reported that he only went to the first portion of the conference in San Antonio. He reported that it would be best for someone new to the council because it was very much a training of what a state rehab council's purpose is. He recommends attending both the NCSRC and the CSAVR.

Lacey asked that if any members are interested in attending this year to email her for more details.

Council Manual update, Marcy Roberts

<https://dphhs.mt.gov/detd/vocrehab/src/staterehabilitationcouncil>

In August 2021 Marcy and team began the process of muddling through the manual in a binder which was very outdated. Shawn has been instrumental in updating the website and keeping the process moving quickly and efficiently. You can now go to the website now for resources that were in the manual with all updated information. The physical manual has also been cleaned up a lot. It is now an online manual rather than paper. This has granted better access to a larger audience including if someone wants to join SRC, they can research through the manual to better understand the council. They also added a useful information link for disability resources, physical and mental health, medication, employment, careers, education and training and more all across the state. The last thing that needs to be added to the website is a welcome message. Gabrielle will work on this.

Federal & State update, Chanda Hermanson

Chanda reported that VR sent 9 staff members to the CSAVR spring conference. It was a great opportunity to expose VR management to meet the people doing the work for the people, meeting federal partners and being in a room of some really important conversations. There were 500 people at conference this year. The main focus of conference was fiscal budget. The biggest take-away continues to be voc rehab is not spending the money that we are given. The money for programs goes up but we are not seeing the participation rate of people in the workforce change. This is important to focus on so that money does not decrease and VR is left with less ability to help their clients financially. This is a national concern and it is being worked on. Chanda believes that this is a culture shift from when programs could hardly buy anything at all and now they have a lot of opportunity to buy clients. VR met with Utah State University. They shared their proposal for Colorado. Their online portals grant access to a lot of technology to get access to students and the report cards and their IEPs all online for who they are serving. This is an opportunity to streamline some processes. Chanda is hoping to have a conversation about this with the department leadership to see if modified providers could manage this. With VR staffing being low right now it is now viable for them to manage it all on their own.

In regards to pre employment transition services and partnering with all those we talked about, there is a team going to Charlotte, NC on Monday to the capacity building institute that is sponsored through NTACC.

Chanda also reported that as mentioned yesterday, there will be the first-ever disability employment conference in Butte. The intended audience is HR partners and businesses. On the agenda there will be mental health in the workplace, service animals in the workplace, neurodivergent hiring, and more. The Lieutenant Governor will be kicking off the conference. Chanda will share more information on this with the SRC group to share with their networks.

Lastly, Kathy requested a update on the MSUB contract. Chanda reports that benefits counseling is a service that VR provides. All people receiving SSR or SSDI get this service. This gives the benefits planner a certificate and empowers the individual to know that once you earn a dollar wage this is what happens with your package. Help provide clear understanding. VR has hired on someone to maintain the benefits training services to make it more efficient and give them the ability to better maintain it with her solely focused on this program.

Budget Report, Anna Gibbs

Anna welcomed new members and explained her position as Bureau Chief in charge of the fiscal unit within the disability unit transitions division. (Refer to Anna's diagrams in presentation slides) 2022 award for "purple money" was 6 million dollars. In August we applied on reallocation for about 5 million dollars. This brought the total to 11 million dollars for the federal award. 1.6 million was put aside for Pre-ETS, 9.4 million was left for general VR. In reference to "Pink Money" Anna reported that in 2023 the award is 13 million dollars. 11 million for general VR and 3.5 for Pre-ETS.

(See budget slides for further information.)

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																

Chart showing Federal fiscal years purple, pink and yellow

FFY 2022 Award

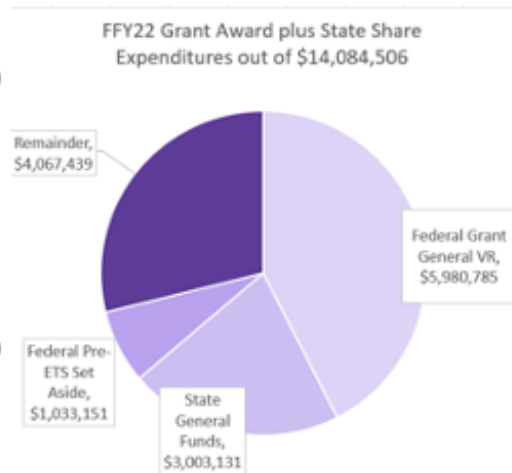
Our **FFY22** award was originally \$6,003,734. In August 2022, we applied for and received Reallotment* in the amount of \$5,080,773. Together, this brings our total federal award to \$11,084,507. This results in a Pre-Employment Transition Services (Pre-ETS) set-aside requirement of \$1,662,676 which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

The breakdown looks like this:

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

The VRBS program expended \$10,017,067 of the **FFY22** grant as of April 30, 2023 as follows:

\$ 5,980,785	Federal Grant Funds (for General VR)
\$ 3,003,131	State General Funds
<u>\$ 1,033,151</u>	<u>Federal Pre-ETS Set-Aside</u>
\$ 10,017,067	Total Expenses



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)											
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												Carryforward of FFY22 Grant												Carryforward of FFY23 Grant											

FFY 2023 Award

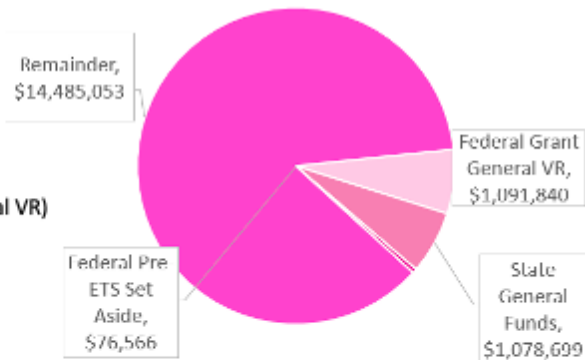
Our **FFY23** federal award is \$13,168,208. This results in a Pre-Employment Transition Services (Pre-ETS) set-aside requirement of \$1,975,231 which leaves \$11,192,977 for General VR. The required State Share is \$3,563,950.

The breakdown looks like this:

\$ 11,192,977	Federal Grant Funds (for General VR)	FFY23 Grant Award plus State Share Expenditures out of \$16,732,158
\$ 3,563,950	State General Funds	
\$ 1,975,231	<u>Federal Pre-ETS Set-Aside</u>	
\$ 16,732,158	Total Budget	

The VRBS program expended \$2,247,105 of the **FFY23** grant as of April 30, 2023 as follows:

\$ 1,091,840	Federal Grant Funds (for General VR)
\$ 1,078,699	State General Funds
\$ 76,566	<u>Federal Pre-ETS Set-Aside</u>
\$ 2,247,105	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 1-31-23 so far totaled **\$1,214,101**.

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)																	
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Carryforward of FFY22 Grant												Carryforward of FFY23 Grant																							

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		TOTAL	
		Federal Fund	State Share		
AWARD		\$ 11,084,507	\$ 3,000,000	\$ 14,084,507	
	Personnel Services	\$ 1,951,087	\$ 1,994,294	\$ 3,945,381	
	Operations	\$ 2,888,313	\$ 706,703	\$ 3,595,016	
	Client Services	\$ 2,174,537	\$ 302,134	\$ 2,476,671	
	Total Expenses	\$ 7,013,936	\$ 3,003,131	\$ 10,017,067	
	Remainder	\$ 4,070,571	\$ (3,131)	\$ 4,067,440	

		FFY23		TOTAL	
		Federal Fund	State Share		
AWARD		\$ 13,168,208	\$ 3,563,950	\$ 16,732,158	
	Personnel Services	\$ 165,920	\$ 589,349	\$ 755,269	
	Operations	\$ 560,268	\$ 322,747	\$ 883,015	
	Client Services	\$ 442,218	\$ 166,603	\$ 608,821	
	Total Expenses	\$ 1,168,406	\$ 1,078,699	\$ 2,247,105	
	Remainder	\$ 11,999,802	\$ 2,485,251	\$ 14,485,053	

Blind and Low Vision Services Report, Darrel Hannum

Darrel reported that Blind and Low Vision services are trying to focus this year in particular even more so on building our partnerships and collaborations. He highlighted the partnership with Northwest Association of Blind Athletes. They help people with blindness or low vision to have access to exercise, fitness, activities, support, but most importantly to Darrel is

community and awareness of community around them. This lets individuals know that they are not alone.

The other partnership that Darrel reported on was a contract with the Montana Association for the Blind. This partnership will fund the summer orientation program this year. This program is an intense three/four week residential program for people who are newly blind or new to severe vision loss. There is an application process that they have to go through to be able to be accepted to the program. It occurs at Rocky Mountain College. It provides mobility skills, instruction and activities for daily living (including money management, budgeting, cleaning, laundry, household organization, time management, grooming, cooking, eating, and also they do a lot focusing on counseling for adjustment to blindness). Additional classes that are not required are offered as well like workforce readiness, computer skills, braille.

Blind and Low Vision will be funding the NFB news line again and are doing a refresh and update to all of the Randolph-Sheppard Programs which is the business enterprise program.

Extended Employment and Customized Employment, Lacey Conzelman

Lacey reported on extended employment which is a program within disability employment and transitions division. It is not a VR program. Extended Employment is a pot of money. It is all funded through the state general fund. This helps individuals who are exiting VR but need additional training or coaching for long-term employment to maintain their job can move into the extended employment program. There are currently 272 extended employment clients. That number continues to grow as they have had to come on and off of an order of selection. There are about 26 contractors for this program.

Lacey then highlighted customized employment. Mark Gold and Associates is a business that trains on customized employment. Customized employment is a specific kind of model of employment services that was developed primarily for people with intellectual disabilities. It serves as a different way to get to know people and get to know their strengths and abilities. This process is called discovery. This process filters the individual to be trained in customized employment and helps them find a job that fits them best. They are working on a new way to bring customized employment to be more efficient and effective in Montana.

Darrel reported on why they went away from using Mark and Gold Associates for this program. This is because in addition to CRPs they also

have the support of 2 additional staff members to take this on. This system works better and streamlines the process. Even this change wasn't enough to incentivize providers to continue along those lines. Training will be offered free to staff to get and train the trainer. This will begin to be offered to providers and start offering the training.

Pre-Employment Transition Services Report & Deep Dive, Tammy Hogan

Tammy invited Andrew Lowney to come present on Pre-ETS. Andrew is a Pre-ETS specialist for the Missoula region. Andrew highlighted the five main services for Pre-ETS. The first is job counseling. This is the starting point for Pre-ETS. This is where most schools start freshmen out at. These are the basics of learning about work, having conversations about what work is, what job application, what is a resume, how do you apply for jobs, etc. The process dives into what is work, what are your interests, what do you want to learn more about and then progresses from there. They also have conversations about accommodations at work and how to ask for these accommodations.

Then when they are a junior or senior they move into the work-based learning program. This is when the students get to actually start job shadowing, meeting with employers, or bringing the employers into the school. These experiences can occur within any type of employment. Pre-ETS tries to match the site to each student's interest. During these work-based learning experiences students also have the opportunity to visit and tour work sites.

Another service Andrew touched on is Counseling on opportunities for post-secondary education programs. This helps students identify their career goals, determine if or what additional training beyond high school is required. The specialist will then coordinate program tours and informational interviews, assist with applying for post-secondary programs, connect with Disability Student Service programs, attend IEPs and provide input and suggestions, coordinate with Adult Learning Centers, and connect with dual enrollment opportunities.

The students can then utilize the workplace readiness training. This training is used to develop social skills and teach students the work habits employers expect. This can include training on social and interpersonal skills, independent living skills, soft skills, and workplace behavior.

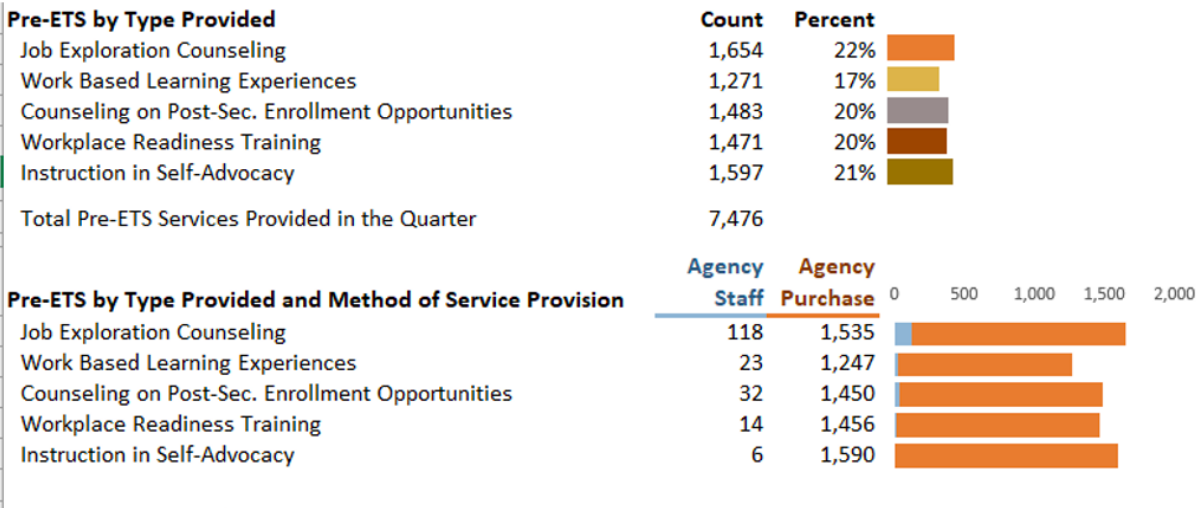
Tammy reported on data. Each school sends in their data for the Pre-ETS report.

Pre-ETS Data for Oct-Dec 2022

Number of Students with Disabilities (SWDs) Reported	2,597
Number of SWDs who Received Pre-ETS	1,767
% of SWDs Receiving Pre-ETS	68%

	Count	Percent
Count of SWDs rec. Pre-ETS who are Potentially Eligible	1,521	86%
Count of SWDs rec. Pre-ETS who Applied	246	14%

Pre-ETS Data for Oct-Dec 2022



Tammy and Andrew summarized the referral process for Pre-ETS. Referrals are received from schools, community agencies, families, etc. Students will

complete the Student Request Form signed by the parent if the student is under 18 and then signed by whoever is referring them. She also talked about the difference between a school contract and a CRP contract. CRPs make the referral for services. The student has a signed Student Request Form and then the services are authorized through the school with a PO.

Pre-ETS is working to ensure quality services with these contracts by scope of work review and approval, desk audit review of all quarterly reports prior to payment, regular site visits from Pre-ETS Specialist, follow-up from management if needed, CSAVR training recently to refine monitoring process and ensure consistency.



Pre-ETS Case of the Year

Drae participated in all five of the Pre-ETS through his high school Pre-ETS contract (Bainville) from fall of 2021 to present. He applied for VR Services through the Havre Office in April of 2022. Since then, he has worked with his Pre-ETS Specialist Rebekah to finalize his IPE. There were several meetings to determine a job goal for Drae, as he was unsure of his goals and allowed his mother to do a majority of the talking in meetings. As time progressed and meetings became more frequent, Drae started talking for himself: sharing his goals and hopes for the future. He also took over with scheduling his appointments. We utilized several resources to determine his exploratory job goal: virtual job shadow, community and church members, in-laws, and even looking at the various jobs that people in the community and abroad were doing. Drae learned of several careers on his trip to Washington DC for the youth leadership tour that he received through a scholarship from Rural Electric.

Drae attended MYLF in the summer of 2022. During this time, Drae spoke on the floor of the senate and made several friends. He is continuing into MYLF II. Drae also maintained multiple summer jobs and remained organized with meeting his work deadlines. Drae was then nominated and chose to attend the CSVAR conference in Texas in October. He presented and shared his story about his experiences with Pre-ETS, MYLF, and overcoming obstacles. He received a standing ovation. Drae has now shared that he is interested in counseling and mental health as a possible job goal. He has made great strides in his self-advocacy, decision making, and is working towards gaining more independence. Drae will be graduating in May of 2023 and is anticipating continuing his education thereafter.

Disability: Autism

Community Partners: MYT, MYLF, CSAVR, Pre-ETS, Bainville High School, Rural Electric of Montana

Services provided: C&G, I&R, Pre-ETS: JEC, WBLE, Instruction on Self-Advocacy, Counseling on Post-Secondary

Comprehensive Statewide Needs Assessment Survey, Lacey Conzelman

Lacey summarized the Statewide NHeeds Assessment and the State Plan and how they all feed into each other. The Statewide Needs Assessment is required to be done every 3 years. The data that is collected from that and the assessments and conclusions are drawn from the assessment are used to inform our strategies. Lacey reported that they look at the assessment and determine how things can be improved upon and how the good can be maintained. This information is all written up and put into the State Plan. They are required to report on describing the rehabilitative needs of individuals in Montana, particularly the VR service needs of individuals with the 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

VR program, individuals with disabilities served through other components of statewide workforce development system. Lacey reported that they are mandated to report on youth with disabilities and students with disabilities including their need for pre-employment services or other transition services and to assess the needs for transition services and pre-employment services and to extend which such services are covered under IDEA. They also have to assess the need to establish, develop, or improve CRPs in Montana. This year they were required to collect more data and the CR program is becoming more complex. The collect feedback from counselors, CRPs, businesses, stakeholders, and other people involved in VR to gather feedback on the VR program. Contractors are also collecting data through focus groups.

After the assessment is completed then the meetings occur to make improvements. Including methods to expand and improve services to individuals with disability related to assistive technology, methods to improve and expand strategies to to improve Pre-ETS, outreach to serve individuals who are minorities or underserved, or unserved, improving CRPs, strategies to improve Montana performance with respect to standards and performance indicators. This is also where values and goals are determined.

To finish this section Lacey presented on the State Plan. Once the needs assessment is completed and strategies are developed they meet to put the State Plan together. Within the large state plan there is a VR section. See headings below on all areas that are reported on in the State Plan for VR.

Strategic Planning & Work Plan

Access and Quality	Youth Engagement	Equity	Coordination	Organizational Sustainability
Montanans with disabilities can access high-quality competitive, integrated employment.	Montana youth with disabilities are effectively engaged in vocational exploration and work readiness training.	All people with disabilities are engaged and valued for their abilities and contributions to our workforce, with extra emphasis on reaching underserved and unserved populations.	Montana's workforce system is coordinated to effectively support people with disabilities and their employers.	VRBS is a stable, sustainable organization.

Hot Topics Discussion, Lacey Keller & Gabrielle Broere:

- Awareness
- Olmstead
- Subminimum Wage

Meetings specific to these hot topics will be scheduled at a later date.

Wrap Up & Final thoughts:

- Gabby will send out the Welcome message to the Council members for their review and inputs. This will be discussed during August SRC meeting.
- Topics for next meeting:
 - Transportation
 - Choose a specific area in Anaconda to improve
 - How to impact the community
 - Economic Development
 - Partner with Behavior Health

Next meeting dates and location:

- August 10 – 11, 2023 in Anaconda
- November 2 – 3, 2023 in West Yellowstone