

STATE REHABILITATION COUNCIL MEETING MINUTES

September 19, 2017

ATTENDEES

Sherri Clark, Nicole Cleveland, Jill Crosser, Randy Davis (by phone, 11:30 a.m.), Kim Drew (a.m. only), Page Eastin, Pam Fitzsimmons, Rosie Thierer, Scott Turczynski, Brian Warner, Alex Watters, David Mitchell (ex officio, non-voting);

IVRS Support Staff: Richard Clark, Jeff Haight, Kenda Jochimsen, Kelley Rice, Lee Ann Russo, Kathy Slater; Other: Ben Humphrey, IWD Staff Attorney, Stefani Meyer, ISE Business Development
Public: Mari Reynolds

ABSENT

Lori Moore, Gary McDermott

CALL TO ORDER

Chairperson Jill Crosser called the September 19, 2017, State Rehabilitation Council (SRC) meeting to order at 10:39 a.m., with introductions.

QUORUM

A quorum was established with 9 voting members present.

AGENDA APPROVAL

Alex motioned to approve the agenda, Pam seconded. **Approved unanimously by voice vote.**

JUNE 6, 2017 MEETING MINUTES APPROVAL

Kim motioned to approve the meeting minutes. Rosie seconded the motion. **Minutes approved as amended at Rosie Thierer's request to revise the sentence on page 9:** "There is a confusion or misperception among legislators that people on Medicaid get free VR services." This is corrected to: "There is a confusion or misperception among legislators that people *have to be eligible for Medicaid in order to receive VR services.*"

PUBLIC COMMENT

No public comment at this time. Mari Reynolds joins this meeting to take notes for member Lori Moore, who could not attend due to a scheduling conflict.

VOTE TO AMEND BYLAWS

Paige motioned to approve the bylaws, which eliminates a Finance standing committee and merges financial responsibilities into the general SRC tasks. Kim seconded. **Motion passed unanimously by voice vote.**

ADMINISTRATOR'S REPORT

David conveyed that he is working on a plan to highlight IVRS program areas for SRC that are pertinent to the State Plan. This will help members gain a better understanding of the connections to our state plan partners and how we work together. This is aimed towards a goal of improved communication and feedback in the future. A handout was provided in the meeting packet. Additional updates regarding the administrator's agency activities include:

- Nebraska Career Pathways – A new staff person will start Sept. 22, 2017, with funding paid by the grant. This is an initiative in which Iowa helped Nebraska write the grant – funding will be coming from the state of Nebraska's federal allocation; the grant ends

September 2020. With a focus on the Sioux City/Council Bluffs corridor, the new staff person will contact clients with successful case closures in the past four years in these key categories: engineering, health care, transportation/logistics and advanced manufacturing. There are 175 people with successful closures; it is estimated that 20 will go forward with advanced credentialing to further career advancement. IVRS will receive reimbursement for expenses; it is planned that this effort will also further IVRS business engagement efforts in this area.

- Omaha Indian Tribe – The tribe has a VR federal grant to qualify for the Native American VR program. They have their own funding, policy and procedures. David met with tribe representatives to see how IVRS could collaborate in Monona county – there are potentially 100 job candidates. The plan is to create a Memorandum of Agreement with IDB to work with the Omaha Indian tribe on collaboration efforts regarding education, training and cultural understanding.
- Future Ready Iowa (FRI) – On October 20, David will be traveling to Iowa City High School with the Governor, Lt. Governor, and Dan Houston, CEO of Principal Financial Group and co-chair of the Future Ready Iowa initiative. The IVRS Iowa city office will be holding an event at the high school. This event is focused on the FRI goals of getting Iowans ready to work, getting them credentialed and getting them hired – and how this can positively impact students, including those with disabilities.

They will also be making funding recommendation to the Iowa legislature. Iowa will be a “Last Dollar Scholar” program. As students go to high demand career fields, they can receive funding for any unmet needs through this program. There will also be funding to help those who dropped out of college and did not finish their degree. “You Can Go Back” is for adult learners to upgrade skills. Another initiative is remediation – for those who need post-secondary assistance in reading, math skills, etc. that is specific to their career goal.

STATE WORKFORCE UPDATE

Ben was an SRC speaker in March 2017, when he spoke about legislation pending regarding the State workforce board. He updates the council today on this topic.

In order to receive core program federal funding (Title 1 – Adult and Youth programs, Title II – Adult Education and Family Literacy Act program, Title III – Wagner-Peyser Act program, and Title IV – Vocational Rehabilitation program), a Unified State Plan is required. Last year, this represented \$58.3 million in funds. WIOA requires workforce development partners to work together to align their various service delivery systems, eliminate duplicity and create easier handoffs between partners. The core partners involved in submitting a joint state plan are Iowa Workforce Development, IVRS, Iowa Department for the Blind and the Iowa Department of Education. Fourteen of fifteen workforce regions have core partner representatives. The IVRS challenge is to meet the needs of each region, which could be very different from region to region. The connection between all entities is the Unified State Plan, which creates a system that is more streamlined and effective for shared customers and the handoff is easier.

The Unified State Plan must include a strategy for a state workforce board.

The board is transitioning from 9 to 33 members, with 33 being the smallest membership allowed and still comply with WIOA requirements. The State Workforce Board is comprised of the governor, a state senator, state representative, a local municipal and county official, plus a member who represents the core programs. Members of the business community must comprise 20% of the board membership. Ben noted that full membership can be challenging,

because in addition to the federal statutory requirements, state requirements must also be met. The summer transition from Governor Branstad to Governor Reynolds paused the changeover of the board, but membership compliance is anticipated by the next meeting in November 2017.

Other workforce news:

- Disability Access Committees (DAC) have been established in each of the 15 workforce regions. They are currently assessing facility accessibility for persons with disabilities. SRC member Brian Warner is a member of the local DAC – Region 2. He noted that Region 2 (Mason City area), is at the forefront of activities and commended them for their good work. Ben commented that this region is quickly becoming a model for the other regions. David pointed out that the DAC work is in addition to Brian's regular duties as a counselor; Ben added that once they are caught up with assessments, the load will lighten. Annual assessments will require less work as they will be starting from a point of compliance. The goal is increased access to programs. Lee Ann Russo inquired as to whether transportation needs will be a part of accessibility, Ben said that programmatic access includes being able to get to these facilities, so it certainly could be included.
- IWD is currently implementing a web-based case management system, which will allow people to have initial access to services that isn't contingent upon travel. There will also be a language component that will allow for translation. This is another way they are trying to maximize accessibility. Kim Drew questioned utilization of a touch phone for accessibility, but Ben said that workforce unemployment insurance experience showed people got a lot of incorrect information because people may inadvertently push the wrong buttons. Ben added that transportation issues have no single answer and he believes one of the answers will be through web accessibility.

NCSRC UPDATE

- Jill provided a brief overview and gave the website for the National Coalition of State Rehabilitation Councils: ncsrc.net. This website notes meetings and other resources that might help SRC members. Anyone interested in joining the listserv may do so – contact board secretary Kathy Slater. Jill and Alex will provide coalition updates at the quarterly SRC meetings. She noted the NCSRC mission: *On behalf of people with disabilities, our national membership coalition will advocate for and work in partnership with the national public vocational rehabilitation system's continual quest for excellence.*
- Alex added they would like feedback from SRC regarding whether the council will support members attending the national conferences at some point in the future.

UPDATED PHOTOS

Jill asked that all members needing an updated photo for SRC marketing and report materials please meet with Vicki Carrington. She asked Vice-Chair Alex to stay after the meeting to do a brief video for new member orientations.

SRC MEMBER SPOTLIGHTS

Members Pam Fitzsimmons and Scott Turczynski were not able to present, due to lack of time.

Note: The RSB/CAP Policy discussion was moved to the afternoon as the morning general session was running considerably over the time allotted.

LUNCH PRESENTATIONS

Vision 2020 – David

This is an initiative by the Council of State Administrators of Vocational Rehabilitation (CSAVR), which does not have oversight or federally mandated authority of IVRS, but rather, represents all state VRs, Departments of the Blind and state combined agencies. 2020 is the 100th year anniversary of vocational rehabilitation – the goal is to rebrand the national VR image for the year 2020 as a role model in the disability employment community. CSAVR meet with and surveyed various constituents, stakeholders and partners and a key discovery was people want agencies to do more with what they have – not more funding. There were also a lot of misperceptions about VRs. An item of note is that Steve Wooderson was the former IVRS Administrator and now is the CEO of CSAVR.

- Alex would like to change the perception that VRs are not good collaborators.
- Jill added that some IVRS “Vision 2020” actions may be driven by the results of the SRC ICIE/Outreach committee work.
- David would like SRC feedback about where IVRS should set priorities, indicating he will send out the CSAVR Vision 2020 PowerPoint.

Iowa Self-Employment (ISE) Program – Stefani Meyer

Stefani is a new Business Development Specialist (BDS) with the ISE program, working approximately eight months in her new role. She shared some of her success stories, provided a presentation about the program and presented information regarding suggested changes to the ISE program.

There are two options in the ISE program, the full program which offers \$10,000 based on a job candidate’s matching business assets, as well as \$10,000 in technical assistance. A second, smaller option referred to as ISE Placement is available, which provides up to \$1,500 in financial assistance with no match required and no technical assistance. Changes proposed are related to the smaller of the two programs:

- Change the name of ISE Placement to ISE Microenterprise because Placement is not unique to ISE, using “Placement” in the name is a misnomer.
- Adding a small amount of technical assistance to the Microenterprise program to mirror the full ISE program - \$1,500 in technical assistance could add capacity and revenue for a small business for items such as: develop a business website or logo, bookkeeping training, or obtain articles of incorporation.
- Freedom to progress – this is to limit bureaucracy for counselors and job candidates and is geared towards counselors who are comfortable with the self-employment program. BDS would still be involved to provide business expertise and technical assistance to the counselor who would then provide this technical assistance to the job candidate. Another reason for this proposed change is to expand the capacity for the two business specialists to focus on the more complex aspects of those job candidates involved in the full ISE program.

In response to a question from Alex regarding how many job candidates were in the full ISE program, the self-employment program rehabilitation assistant Linda Vongxay stopped in to provide the following for the period 10/1/16 – 9/19/17:

Step in ISE Process	# Participating
Full ISE Program	100
ISE Placement	1
Orientation stage	28
Initial Planning stage	21
Business Feasibility stage	18
Business Implementation stage	24
Business Follow-up	4
Successful Employment (Status 26)	5

As a way of increasing efficiencies, Alex suggested that perhaps a job candidate who has been trained as a graphic designer or an IVRS staff member could be dedicated to doing graphic design work to eliminate paying out technical assistance. Page noted that a job candidate (person with a disability) would qualify as a targeted small business, as well. While these are good ideas, Stefani's concern is that job candidates should have the freedom to choose the provider with whom they are the most comfortable and best fits their needs and not be directed only to a VR staff person or VR-trained job candidate.

Page noted that the VR Service Delivery committee is supportive of these proposed ISE program changes. She also commended Stefani on her approach and investment in working with IVRS job candidates. Mari Reynolds asked if there was a way to advertise job candidate services and Page suggested the Iowa Compass resource database as a possibility.

ORIENTATION FOR NEW MEMBERS

David noted VR staff and the Executive Committee are continuing work on SRC new member videos and hope to have something that will go out to SRC members in the near future. Action shots and updated photos taken throughout today's meeting will also be incorporated into the videos.

FINANCIAL UPDATE

Members received charts in their meeting packet, which agency data resource manager Jeff Haight explained.

IVRS Revenue – No increase is seen in revenue for IVRS for FFY18 revenue, which shows the same in federal funding and an expected \$125,000 less in state appropriation match – the agency does not expect to regain this. Other revenue in FFY17 and FFY18 comes from third-party contracts and an additional \$175,513 comes from other Cash Match such as the Department of Aging and Iowa School for the Deaf contracts. David noted that all of our third-party contracts are related to Pre-Employment Transition Services; last year, the agency had to give back about \$700,000. WIOA legislation requires a goal of 15% expenditure of resources targeted to these services. IVRS met this goal during the current year, so the priority attention to this made a difference.

Waiting List – as of August 31, 2017, the waiting list contained 822 job candidates.

Cumulative Successful Closures – FFY17 has a total of 1681 successful closures, which reflects 69 less than a year ago at this time.

Sustainability/Cash Flow – this is being carefully monitored. The current model shows positive cash flow and carryover amounts for 2017 and 2018, with negative cash flow in FFY19. Based on current information, expenditures in FFY19 are anticipated to exceed cash available by \$2,370,500.

Case Service Authorizations – costs are exceeding the past three-year average, things simply cost more. The number of authorizations is less, but the dollar amount of each authorization is higher. David noted that post-secondary costs are trending down but post-employment and supported services costs have gone up. Also, VR counselors are serving about 2,700 more students who are potentially eligible. Although counselors are busier, there is no credit for these students on their caseload.

- Alex expressed that it is critical to tell the IVRS story and the significance of a status quo budget in a time of rising costs.
- Page suggested a digital, visual summary for the legislative reception rather than just a piece of paper that will probably get thrown away.

IL AND PARTNER CONTRACTS UPDATE

No report due to time constraints.

DD COUNCIL UPDATE

No report due to time constraints – an update was included in the meeting packet.

CAP REPORT

No separate report, comments were included in the RSB/CAP Policy Discussion.

SILC UPDATE – No report available.

RSB/CAP POLICY DISCUSSION

Richard noted the key changes per the handouts provided in member meeting packets and detailed below.

Financial assistance changes:

- Worker Compensation provision added under *C. Comparable Services and Benefits*, pursuant to House File 518.

On-the-Job Training:

- Where training references were previously noted in weeks, it was changed to hours throughout the policy.
- Added monitoring the training plan per the needs of the employer and VR job candidate under *B.(1) Scope of Services – Provision Specific to Both OJT-Trainee and OJT-Employee*.
- *C. Agency Expectations* – Frequency of contact with a job candidate is changed to once per month if not in classroom training; one hour of classroom per 39 hours worked for those not in classroom training.
- *D. Exceptions* – added the verbiage “not using a CRP” to develop a stipend-supported, unpaid OJT. The reasoning for this change is the assumption of liability by the CRP rather than IVRS in work situations with safety concerns.

Rehabilitation Technology:

- *C.(9)(b.) Agency Expectations Specific to Vehicle Modifications* – At the request of the Coordinating Council, it was recommended to differentiate between when the job candidate is the driver and when they are a passenger in a vehicle being modified.
- *F.(3.) Exceptions* – Clarified when a supervisor is required to approve purchases, which is any time the authorization exceeds \$5,000.

Assessment for Determining Eligibility and Vocational Needs:

- E. *Job Retention* – deleted the requirement that an individual needing VR services should have documentation from the employer. The reasoning for the change is to ensure that nothing slows down the process.

Alex inquired about how IVRS determines that job retention services are needed since this could be a perception and not truly that the job is in jeopardy. Richard responded that WIOA legislation gives VR agencies authority to provide job retention services when there is a clear disability connection to specific services or equipment needed to maintain employment.

Post-Secondary Funding:

David presented information about the funding of post-secondary training, noting this was not included in the meeting packet handouts. This is new information.

Current policy: IVRS pays 40% of tuition and fees based on the least expensive community college in Iowa for the first and second years, and in years three and four, IVRS pays at the rate of the least expensive regent school. This calculation/fee schedule includes tuition, fees, books, supplies and support services.

There are issues with the current policy and IVRS needs to look at changing it for these reasons:

- By combining a lot of services together it may force students to take out loans.
- SSI and SSDI amounts were not appropriately applied to post-secondary decisions.

Proposed policy change: IVRS will pay 40% of tuition, based on the actual cost at an Iowa community college or 40% of the cost at a regent school. For programs that don't fit into this criteria, IVRS would pay 40% of the most expensive community college cost or regent rate. For out-of-state schools where it is a course of study or program not available in Iowa, IVRS will pay 40% of whichever is cheaper – the in-state rate or out-of-state rate. IVRS would first need to look at comparable programs across colleges. A thorough financial assessment would need to be completed; any IVRS financial aid should not reduce any other benefit, in those cases, we would reduce the IVRS benefit.

Page expressed a need for clarity of the IVRS process regarding changes to policies. David noted it is planned that the process will be that field staff – in conjunction with the SRC, identifies areas of concern and work with the Coordinating Council for review and suggested changes. Recommendations are made by agency administration. Information should flow freely between the SRC and Coordinating Council.

It is also planned that the Coordinating Council will spend future meetings reviewing sections of policy and making recommendations for changes. It is hoped that formal changes might be able to be introduced twice per year, in December and July as an example. Review, ideas and the flow of information would occur at the meetings in between. On occasion, that might need to change if it is a critical priority area, but by having a set structure, it will hopefully be easier for all to understand.

The Coordinating Council will have representatives from each area office and Resource Manager Brandy McOmber will coordinate, facilitate and ensure the process and recommendations move forward to and from the SRC, and eventually to management for decision making. No IVRS management will be present at the Coordinating Council meeting. Recommendations will flow to RSB Management and Administrator for final decisions regarding acceptance of feedback and implementation. Then, the information and reasoning will be shared back to the Coordinating Council and SRC.

SMALL GROUP POLICY DISCUSSION

To ensure all had a chance to talk about policy and ask questions, David asked the groups to break into three smaller groups to ask questions and discuss policy presented at the meeting.

Feedback from the small group discussions:

- **Post-Secondary Funding:** No comments. There is need to further explain or provide more information so they can better understand the proposed policy changes. Page asked for the policy process. As it relates to the tuition policy, David noted that it also needs to be conveyed to RSB field staff, input is needed from SRC and this policy needs to be implemented in January. This is only in draft stage and further details still need to be worked out.
- **Referral Process:** Suggested the wording be changed to reflect that guardian signature at referral is “not required but preferred.” When an individual is referred to the agency and they have a legal guardian, it is a good practice to attempt involving the guardian. However, information can and should be provided about available and potential services to the job candidate – if the guardian signature is not available or will unreasonably delay sharing information. Comment included staff training should be provided to specify that it is not required but is a good practice to implement - if it is not immediately available it should not delay the process for providing information.
- **Self-Employment:** All were on board and noted enthusiasm about the ISE program and the proposed changes noted earlier.
- **Appeal Policy:** Proceed with language that is aligned with the Iowa Administrative Code identifying language that there is a 90-day limit for appeal and clearly articulates the process. Kelley will amend the appeal form and provide to council at next meeting (Dec. 2017).
- **Assessment for Determining Eligibility (Job Retention):** There was SRC agreement with the Coordinating Council proposal to not require documentation from the employer that a job candidate’s employment is in jeopardy. IVRS will determine eligibility for job retention services on a case-by-case basis without a requirement that input or documentation from the employer is needed before proceeding.
- **Career Counseling:** Page noted this was not discussed or presented to SRC. She attended the Coordinating Council meeting and noted there was discussion regarding three ways IVRS Counselors can document that individuals employed at subminimum wage have received required career counseling, information and referral.
 - She suggested eliminating item #1, which noted that the CRP employing the individual at subminimum wage identifies another entity who provides career counseling and then VR signs off that it was provided. IVRS staff should provide career counseling – for quality control and ensure consistency and a concise message.
 - She suggested changing #2 - the sentence “IVRS staff presents a PowerPoint and documents that career counseling was provided” be changed to: “IVRS staff provides career counseling and documents that it was provided.” This better clarifies that it is career counseling provided and not just reading a PowerPoint.

STANDING COMMITTEE REPORTS

VR Service Delivery – Page Eastin, Committee Chair

In addition to the above discussions noted, the Rehabilitation Technology policy was discussed during committee work and Page noted that section *E.(2) - Accommodations* is a more restrictive policy regarding service animals, and as currently stated, will be a liability. Because services are individualized, the committee does not feel it should be included in policy as a one-size-fits all accommodation. The committee disagrees with a policy that says we will not purchase service animals. Alex noted the policy clarity, saying they feel the language is confusing.

Alex said they would like to use the Vision 2020 consultation opportunities for some things and embrace the Vision 2020 national initiative of collaboration, pushing that culture throughout the IVRS system. An example was the issue of guardian signatures at the referral process. Some VR staff will not allow the process to move forward, others say it is not needed. Perhaps utilizing CSAVR consultative services would assist IVRS in areas such as getting everyone on the same page to positively change the VR program.

Outreach – Jill Crosser

Jill discussed an online Survey Monkey used by ICIE to solicit feedback; in less than a month, they were able to get 350 responses that generated 70 pages of data. The survey consisted of 14 questions, structured with answer choices, the opportunity to provide detailed feedback and then the chance to suggest how to improve. The committee thought areas of focus could deal with perceptions regarding:

- Lack of IVRS collaboration with other entities and/or referral sources.
- Ease of access to services – some VR locations could be difficult for those in rural areas.
- Communication. This was a consistent topic throughout the survey regarding communication between the counselor and job candidate. There was not clear understanding regarding the next step in the VR process nor consistent follow-through.

Amy Desenberg-Wines and Jessica Kreho (ICIE), shared recommendations at the committee meeting for work group members to think about, noting that some work needs to occur prior to the December meeting for the committee to determine what needs to be brought to the council. Jill believes their work ties nicely into Vision 2020. Amy and Jess will be presenting at the December SRC general meeting as well.

David offered to contact CSAVR and clarify their role in supporting the SRC and IVRS as we move forward with strategic initiatives.

Rosie said the issues noted in the survey are common issues in the VR process related to consistency, for example, how are things handled when someone leaves and things get “shuffled” in the process? She added that the survey contains a significant amount of text rather than just numbers data. The challenge is to sort through the text and determine “What is the story?” Can it be quantified or patterns found?

David sees this as a guiding document for SRC and IVRS and not something that will end in December. It is recommended the survey be conducted annually. He noted that about 40% of respondents are not happy and this is something that IVRS should be concerned about it.

MEMBER FEEDBACK SURVEYS

David shared that two surveys were developed this summer by the SRC Executive committee. One survey solicits feedback from members about the meeting and is completed anonymously.

The second is a request for additional follow-up from the VR Administrator or the SRC Chair – this one requires a name and contact information. Jill added that the surveys were created with the intent that members feel valued and heard. Feedback received will be used to create a more meaningful and effective SRC meeting. The two surveys were distributed with time allowed for completion.

ADJOURNMENT

A motion for adjournment was made by Page and seconded by Alex; all were in favor. The meeting adjourned at 3:10 p.m.

The next SRC meeting is scheduled for Tuesday, December 5, 2017, in Des Moines at the Jessie Parker Building, Knudsen Room, from 10:30 a.m. until 3 p.m., with committee meetings beginning at 9:30 a.m.

Meeting minutes approved by the Council on this date: _____

SRC Vice-Chair – Alex Watters _____