

STATE REHABILITATION COUNCIL MEETING MINUTES

SEPTEMBER 11, 2018

ATTENDEES

Dennis Bruce, Nicole Cleveland, Randy Davis (left at 1:45), Kim Drew, Page Eastin, Gary McDermott, Monalisa McGee, Mari Reynolds, Daryn Richardson, Kyle Roed, Lisa Schneider, Scott Turczynski, Brian Warner (non-voting), Alex Watters.

IVRS Support Staff: Steve Faulkner, Jeff Haight, Brandy McOmer, Kathy Slater, Kelley Rice-afternoon, Lee Ann Russo.
Other: Vicki Carrington, IVRS Info Specialist

ABSENT

Pam Fitzsimmons

CALL TO ORDER

Chair Alex Watters called the September 11, 2018, State Rehabilitation Council (SRC) meeting to order at 10:35 a.m., with a welcome and new member introductions.

QUORUM

A quorum is established with 13 of 14 voting members present.

AGENDA APPROVAL

Scott motioned to approve the agenda, Kim seconded. **Approved unanimously by voice vote.**

MAY 8, 2018 MEETING MINUTES APPROVAL

Alex motioned to approve the meeting minutes. Randy seconded the motion. **Minutes approved unanimously by voice vote.**

PUBLIC COMMENT

No public comment. Randy shared an update regarding the South Central Iowa Center for Independent Living financial literacy initiative. This is a collaborative effort utilizing local credit union staff, who receive paid volunteer time to act as a resource in literacy for the Center.

ADMINISTRATOR'S REPORT

David Mitchell provided a written report to the Council. He drew attention to upcoming statewide Future Ready Iowa Summit dates and locations, which are on the first page of the handout. This is an opportunity for SRC members to provide input on local strategies for creating a future-ready workforce.

Iowa is a lead agency with Employment First. IVRS spearheaded a pilot project to address how IVRS staff can better partner with Community Rehabilitation Providers (CRPs). The project focused on technical assistance to CRPs and IVRS staff in Cedar Rapids and Des Moines. IVRS contracted with a subject matter expert to provide 200 hours of service. The handout entitled *IA EFSLMP End of Project Summary* contains the key points, notes and feedback from participants.

David has been traveling to each of the area offices. In addition to Years of Service recognition, he is presenting to staff on key agency issues such as budget update, Vision 2020, the Strategic and State Plans as well as the impact of federal legislation referred to as *Prior Approval and Period of Performance*.

There have been several agency success stories:

Burlington office – a transition student obtained his first job at Applebee’s restaurant. A summer work program for students involved a partnership with a work readiness program for students. A local special education teacher attended the summer program. She conveyed she was going to advocate for this program as she had observed such success with one of her students and thought it would be good for all students.

Mason City office – summer program students were surveyed on the first and last days of the program. A first day response included, “What if you are worried about the future?” By the end of the program, responses were indicating successes, with comments such as, “Today is a great day!” and “I want to come back next year.”

Iowa Self-Employment Program – JT FireStarters is an IVRS self-employment success story of a young man who now operates his own business.

Ames office (Marshalltown Service Unit) – Kwik Star is a business partnership that has embraced providing opportunities for people with disabilities and the Employment First philosophy. One of IVRS’ job candidates went from sheltered employment to working at Kwik Star.

Sioux City office – IVRS has three students in the North Central States Regional Carpentry apprenticeship program. Scott commented he might be able to help facilitate employment for students engaged in this program.

Dubuque office – This success story involves a young woman involved in a serious car accident in Atlanta, Georgia. She moved to Chicago and then to Dubuque where she began working with IVRS and Prudential Life Insurance, with whom IVRS has established a business relationship. She attended a networking session that resulted in full-time employment as a service advisor. She is in the process of getting off Social Security disability benefits.

FINANCIAL OVERVIEW

Members received several charts and graphs for their review and reference. Data Analyst/ Resource Manager Jeff Haight noted that Federal Fiscal Year 2017 is still reported – it is not yet closed out. This is a concern as it impacts Period of Performance and budget carryforward. It is due to changes in federal law and a plan is in place to resolve through communication with local area office staff.

Jeff explained that the Other Cash Match is from the AAA contract with Iowa Department of Aging as well as a contract with Iowa School for the Deaf. IVRS contracts with 13 Transition Alliance Programs with school districts, who provide a 50-50 match. David explained that the dollars IVRS receives in this category can be matched with three times the federal dollars and helps to expand the agency’s funding capacity. IVRS has to monitor those contracts to ensure they comply with vocational rehabilitation federal regulations.

The Period of Performance has impacted agency authorization expenditures with an increase. This is due to a change from when the fiscal year funding is determined, which is now by the authorization date rather than when the service was received. This affects tuition and fees for colleges/universities, with authorizations for the fall semester being written in the months of July/August which is the FFY2017 instead of FFY2018.

As of July 31, 2018, there are no people considered the most significantly disabled on the IVRS waiting list. There are currently 14 more successful closures than this time last year.

The Sustainability Cash Flow projects the cash available and expenditures in the future. A positive cash flow for 2018 and 2019 is anticipated. This is always adjusted as a lot of the expenditures are calculated at the full amount. Jeff provided payroll as an example of an expense calculated at the full amount; generally, the number is lower due to staff departures/transitions.

David added that going forward he and Jeff plan to present the information a bit differently. Although council members will still get the charts and graphs, they have compiled a list of questions to answer at each meeting about IVRS financials. The IVRS Budget Team continues to review projections at their monthly meetings. Questions include:

- Is IVRS matching all federal dollars possible?
- Is IVRS meeting the Maintenance of Effort requirement? David explained that if IVRS expenses are not equal to or greater than two years ago, federal funding will be reduced.
- What are the Top 5 case service areas for expenditures?
- What are the Top 5 case service areas in decreased expenditures?
- What is the Sustainability Model for the next two years?
- What are the agency's top expenditures? David added that payroll is one of the top big expenditures. IVRS did have a reduction in the number of full-time staff allowed. However, this was anticipated.

WORKFORCE UPDATE

Page Eastin provided a recap of her handout, most notably that Iowa's unemployment rate is 2.7 percent. Manufacturing leads all sectors with 9,800 jobs added in the past 12 months.

The Disability Access Committee (DAC) is a standing committee of every State Workforce Development Board. The committee has been able to make impactful efforts to ensure VR office location facilities are accessible to all. The committee has engaged customers in focus groups in each Workforce region to gather feedback from Iowans with disabilities. They have surveyed field staff to gauge their level of comfort serving those with various disabilities. Based on that feedback, the DAC will be creating webinar trainings for staff use on a wide range of disability-related topics.

A success story example involved IVRS Des Moines office counselor Becky Lofstedt and One-Stop Center staff member Diane Hernandez. Page offered this as an example of multiple partners coming together to create a unique plan for an individual, expressing her appreciation for this successful collaborative effort.

Ticket to Work Update: There have been 39 IVRS referrals to IWD, which is an Employment Network partner. IVRS is having an area office competition with a pizza party at stake for the office with the largest percentage increase in referrals to IWD.

SILC UPDATE

Gary McDermott provided this update. Highlights of discussion items from the September 6, 2018, Statewide Independent Living Council includes:

The Executive Director recommended that the State Plan for Independent Living Goals and Mission remain the same. There was extensive discussion regarding a one-time ARRA (American Recovery and Reinvestment Act) grant they will be receiving. There is division among the Independent Living Center Directors regarding how the money is to be divided among the centers. No action was taken at this time regarding how to resolve the distribution of the one-time funds. SILC members decided to continue to distribute Part C funds (money that passes from RSA directly to the Centers for Independent Living) as they have in the past.

However, a vote failed to continue to distribute Part B funds as they have in the past. Gary said this issue would need to be revisited.

INDEPENDENT LIVING/PARTNER CONTRACTS UPDATE

Lee Ann provided a handout that shows the ten contracts IVRS will have with other entities in FY19. She also added that benefit-planning training is now extended to all staff that are interested in learning. IVRS has submitted a position request for a statewide Benefit Planner Resource Manager position to the Department of Administrative Services.

IVRS Community Rehabilitation Provider partners receive annual reports from VR. The reports use the four components by which VR is assessed by our federal partners – which IVRS then uses to assess their CRPs. CRPs provide services that IVRS is not able to do. Daryn is the council's CRP representative and conveyed there is a considerable amount of data in the annual reports and likes to be able to see how they compare with others around the state. David encouraged feedback from CRPs as the reports are a benchmark to assess the quality of services and any areas for improvement. Daryn would like to be able to ensure they understand the information in the report so it is interpreted correctly.

LUNCH PRESENTATION – ELIGIBILITY FOR VR SERVICES

IVRS counselor and SRC member Brian Warner presented an explanation about the VR eligibility process, including the nuances of eligibility determination. To be eligible, an applicant must: (1) must have a diagnosable disability, and (2) show multiple services are needed over an extended period to overcome barriers to employment. He noted the seven areas of functional impairments and how they factor into the waiting list categories.

Brian said counselor observation is important in noting functional impairment. Each person is unique, so a diagnosis is not specific to a standard level of impairment. Talking to and getting to know a VR job candidate is critical to gleaning disability information, as well as discerning their likes and dislikes. This can be difficult for job candidates who may not have a lot of self-awareness or self-direction. Motivational interviewing is also a useful tool for the counselor.

Steve Faulkner added that specific to IVRS, the agency has overhauled their quality assurance rubric to assess the quality of staff and counselor services, rather than just “numbers.” Staff receive immediate feedback. IVRS has also increased the number of referrals to CRPs when IVRS is not able to provide the services needed – this keeps the process moving.

Dennis Bruce inquired as to whether the agency could share the percentage of job candidates receiving testing for eligibility. Brian responded this does not take place as much lately as the population served includes more people with the most significant disabilities – who come to VR with a lot of documentation in place.

- David explained that Iowa is a non-categorical state; students are not classified by disability. Mari elaborated that it comes from a desire not to label students. A noncategorical system simply means students are identified as “eligible individuals,” rather than by the disability or impairment.
- IVRS also works with students considered potentially eligible, meaning they do not have to go through the eligibility process. They just have to be under a Section 504 plan or IEP for IVRS to work with them as a part of their pre-employment transition.

DEVELOPMENTAL DISABILITIES (DD) COUNCIL

Brooke Lovelace, Executive Director of the Iowa DD Council presented. There is a DD council in every state, authorized under *The Developmental Disabilities Assistance and Bill of Rights Act of 2000*. Their purpose is to make sure that people with developmental disabilities and their families are involved to help design and have access to services and supports that provide opportunities – including integrated inclusion in their communities. Like the SRC, the governor appoints members. The DD Council mission is to promote policy and practices through capacity building, advocacy and systems change activities. DD Council is 100% federal funded.

Brooke became the Executive Director earlier this year. She has spent the last 10 years devoted to the Money Follows the Person program, which allows people to move out of an institutional setting and into the community.

Other arms of the DD council include:

- IDaction, which has been renamed *Iowans with Disabilities in Action* – which is a part of the DD council.
- InfoNet is a policy resource website created by the DD council. It contains information about state legislators, policy issues that can affect those with developmental disabilities and how to advocate and influence decision makers. The site presents information in a non-partisan manner.

Additional activities include training on how to become a better advocate, which includes attending a self-advocacy conference. This year's focus is "How to become a more independent you." System-change efforts include joining with Department of Education partners on policy change.

Brooke looks forward to future efforts to expand the Employment First project that started in Cedar Rapids and of which IVRS was involved. This will be a chance for the DD council, IVRS and CRPs to work together and align their efforts as they work with those with disabilities.

LEGAL OVERVIEW

Agency staff attorney Kelley Rice presented a handout and legal overview for Boards and Commissions as it relates to open meeting laws.

SMALL GROUP BREAKOUT

Council members divided into two groups to attend sessions on VR services that affect employment. IVRS Counselor Specialist Vienna Hoang provided a presentation on Assistive Technology and agency Resource Manager Michelle Krefft provided an overview of her activities related to business partnerships.

RSB UPDATE

Steve Faulkner discussed the SRC survey of over 350 VR partners last fall. Sixty percent responded favorably regarding how well IVRS collaborates with other stakeholders. He views the 40% as an opportunity for IVRS to do better, much like the WIOA legislation that calls for better partnership and collaboration among workforce systems. The survey helped him understand that VR needs to enhance partnerships through innovation. He has visited every area office twice since he assumed his responsibilities at the beginning of the year. One of the common themes he hears is about communication and staffing levels, so he has spent his time listening locally to what the issues are and getting all parties together to problem solve issues.

Steve commented that although WIOA mandates more to do regarding collaboration and partnership, vocational rehabilitation agencies did not receive extra funding to do so. Improving communication and working on solutions in innovative ways has helped to expand what all can

do. Cross training collaboration and NDEAM observances are being celebrated jointly with our partners. These are examples of progress as it relates to the SRC survey.

RSB POLICY DISCUSSION

David explained to new members how policy development happens. Rather than developing it at the IVRS administrative level, a give and take happens between multiple entities that hopefully moves policy to where it needs to be in order to better serve job candidates. Brandy McOmber presented two draft policies today.

FINANCIAL ASSISTANCE FOR POST-SECONDARY TRAINING: This was an update on activity since the council's May discussion. The changes to policy incorporated council feedback, including clarifying language, better defining the formulas and "unmet need," as well as including in the policy that SSA beneficiaries are exempt from completing the form R-406 financial inventory.

The VR Service Delivery committee has set up a shared Google document page to enter feedback information regarding policies. Page will provide access to Brandy.

R-406 FINANCIAL INVENTORY: The Financial Inventory form is a tool, and staff have requested that proof of income not be required to complete the form, as it was a hold-up to moving forward.

Changes:

- Signature requirement removed.
- Added the regulation requirement of the method of determining financial need. Page expressed that job candidates receiving SSA benefits may feel threatened by a government entity verifying the benefit amount. She suggests removing it from this policy since the discussion is included with the IPE.

Dennis asked whether 175% of poverty level has always been the participation rate used. Brandy will verify this number with Management Analyst Sandy Ostendorf. He also inquired about the reasoning for asking for financial information. David responded that establishing guidelines ensures decisions are not made arbitrarily.

STATUS 32-0 POST-EMPLOYMENT SERVICES: Brandy asked for feedback, questions or comments to be provided to her or Kathy Slater within the next week.

Highlights of this policy's revisions: examples of when post-employment services are available is taken directly from regulations. In addition, item #2, "Agency Expectations" was added after further clarification from RSA. Their guidance was that they would prefer a new case is opened and job retention is used before counselors utilize post-employment services. Closed Case File information in this policy is simply staff guidance.

STANDING COMMITTEE REPORTS

VR Service Delivery – Page Eastin, Committee Chair – The committee spent time discussing their areas of focus, as well as providing an overview to new members about the committee activities. Page said they will be focusing on Section 511, customer satisfaction (experience, services, exposure, successful employment, handoffs), and starting a Google docs file to allow people to comment and provide feedback on policy.

Outreach – Kim Drew, Committee Chair – Members used time to become acquainted. They will decide if they will need a follow-up committee meeting* of about 1½ hours to discuss the

legislative reception. At the committee's request, Kathy Slater is to send out an email to the Outreach committee regarding a follow-up meeting. There was general brainstorming about the January 2019 legislative reception. David asked if they would like to have Vienna Hoang set up an assistive technology table – the group was receptive to the idea. Kim said they have also considered having Michelle Krefft attend to highlight her business/employer successes. Monalisa suggested introducing a job candidate to their legislator to help representatives make that connection to what IVRS does. David will inquire with staff about these suggestions.

Page asked if the group would like to do another PowerPoint, which she offered to create. Alex felt that one-to-one talking to legislators and introducing them to someone from their area was more productive than a PowerPoint. Due to the general noise and congestion, he felt it was difficult for guests to hear and understand the presentation.

Alex summed up today's meeting with words of encouragement for new members, acknowledging that the first meeting can be overwhelming.

**Addendum: it was determined no additional Outreach committee meeting is necessary – no meeting scheduled.*

ADJOURNMENT

Scott made a motion for adjournment, Kyle seconded; all were in favor. The meeting adjourned at 3:07 p.m.

The next SRC meeting is Tuesday, November 6, 2018, 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 – Scott Turczynski _____