

**Montana State Rehabilitation
Council Virtual & In-Person Meeting
Belgrade, MT
November 14-15, 2024
Meeting Minutes**



Members present: June Hermanson, Tommy Roberts, Celina Cline, Joleen Weatherwax, Chanda Hermanson, Doug McElroy, Heidi Gibson, Eva Belatski. On Zoom: Corinne Moore, Desiree Johnson, Gabrielle Broere, Kendra Lewis, and Shandra Bell.

Members absent: Lacey Keller, Brian Tocher, and Jennifer Owen.

Staff and guests: Lacey Conzelman, Darrel Hannum, Sarah Seltzer, Allyson Talaska, Desiree Dean. On Zoom: Tammy Hogan, Shannon Mackey, Kylah Minor, John Kudrna, Anna Everett, Crystal Armstrong, Shannon Hamp, and CART transcribers.

Day 1: November 14, 2024

Welcome, meeting rules, reading of mission statements and announcements.

Meeting minutes from April 17-18, 2024, approved. Meeting minutes from August and November will be voted on at the next meeting in February.

Announcements, & Public Comments:

- Lacey Conzelman announced that she is moving out of the SRC Staff Liaison position and Desiree Dean will be assuming the position.
- Lacey also announced that Sarah Seltzer would be supervising the SRC Staff Liaison
- Kendra stated that she had not received the transcripts from the August meeting, so Lacey C. sent them to her.
- Joleen Weatherwax announced that George V. Kip IV is no longer the Program Director for the Blackfeet One-Stop Center. She asked anyone who may have known or worked with George to send in a short statement to share with him during an upcoming retirement party. Roberta Gordon will be the acting Director until a new one is elected.
- There were no other announcements in the room

- There were no public comments.

Committee Reports:

- **Education and Membership/Bylaw Committee:** The chair position on this committee is open. There are also two other committee positions open. It was shared that they have been creating recruiting materials and flyers for distribution. There are potentially two people interested in joining the SRC who are working on the application process.

- **Consumer Satisfaction & Needs Assessment Committee:** It was reported that we are still in the process of getting the program out for bid. Celina gave a brief history of the Consumer Survey for new members and explained what the hopes are going forward.
- **Policy, Procedure, and Personnel Development Committee:** Chanda reported that there has been no activity on this committee since the last meeting due to a vacancy in the chair position.
- **Planning & Review Committee:** This Chair is also vacant. Lacey Conzelman shared an update on the Governor's Report. She reported that it is almost complete except for an updated picture of the council members. Since there was a shortage of in person attendees this meeting, it was decided that "headshots" would be acceptable. The report is still waiting for a letter from the SRC Chair, Lacey Keller. Lacey C. shared that they have collected the relevant data to report on consumers served this year and they also have chosen this year's success stories. The final piece of this report is for the Recommendations to the VRBS. The council was asked to review these recommendations for this year's report.
- **Legislative Committee:** June reported that this committee has begun a three-phase training course. In the first training session the committee members learned about the legislative process. In the second session they learned how to write letters of testimony and how to go before legislation to testify. The third session topic has been on hold until this meeting to discuss the website and specific bills for the upcoming legislative session. June shared how this process works and said that the Governor's budget is expected this week which will be part of the next Legislative Committee meeting discussion. It was encouraged for any SRC member who would like to attend one of the meetings to do so to stay informed about what is happening in legislation, the legislative process, and to learn how to testify or be able to share with their clients how to testify. The next committee meeting will be in December and the legislative session will be in January. June also shared that the SILC does a Legislative Day on January 27th with training taking place in the morning with a potato bar at noon in the rotunda.
- **SRC Recommendations:** Discussion on the SRC recommendations was postponed for a later date.

NCSRC & CSAVR Fall Conference Update:

Council member Doug McElroy attended the NCSRC & CSAVR Fall Conference in Seattle, WA, and shared key takeaways, including federal priorities:

- Advocacy for VR services within communities.
- Partnerships between Vocational Rehabilitation (VR) and coalitions.
- Showcasing success stories to enhance community expectations.
- Integrating technology & AI to improve adaptive equipment and service efficiency.

Dante Allen, the RSA Commissioner emphasized that State Rehabilitation Councils (SRCs) should serve as public awareness advocates for VR services.

Chanda reported on VR insights, focusing on capacity building, service delivery models, and branding—noting that "Vocational Rehabilitation" doesn't clearly define the services offered. AI

advancements in Outlook and SharePoint were discussed, along with Montana VR's engagement with Rocky Mountain Rehab to explore AI Job Coaching & Interview tools.

A client success story highlighted a hearing-impaired young man employed at the Hyatt in Seattle, whose job training enhanced both his career and staff communication.

Breakout Sessions & Collaboration

- Colorado's Business Services Program was reviewed for employer engagement strategies.
- Networking was a major discussion among state SRC support staff, emphasizing cross-state collaboration.
- Montana participates in Region 8 meetings (with WY, ND, SD, UT) to share best practices.
- Montana & Washington are working together on programs, resources, and service strategies.

Corinne encouraged council members to attend future conferences and shared upcoming dates and locations.

SRC Manual and Bylaw Updates:

Corinne stated that updates need to be presented at the summer meeting for council members to read and be ready to vote on at the fall meeting. This topic was tabled until the February meeting to give the councilmembers opportunity to read through the bylaws and be prepared to present any suggested changes and vote on them.

Presentation

Today's presentation featured Crystal Armstrong from the Department of Labor and Industry and Shannon Hamp, a Montana State University graduate in optics and photonics. Crystal, a core partner with Voc. Rehab, discussed technological advancements and vocational opportunities for VR clients.

Shannon, speaking on behalf of Dr. Shaw, Director of MSU's Optical Technology Center, explained the impact of photonics on self-driving cars, agriculture, river health, and pollution. She highlighted Tech Hub's role in advancing this technology and fostering workforce development. Since its founding in 1992, the Optical Technology Center has grown to include fields like electrical engineering, chemistry, physics, and computer science, attracting 42 Montana-based companies and national interest.

The discussion centered on education and employment opportunities. Currently, Montana has about 1,000 jobs in this sector, with projections of 6,000 direct jobs and 25,000 total jobs. Growth will span Bozeman, Kalispell, Butte, and Billings, with increased opportunities for individuals with disabilities due to advancements in assistive technology. An estimated \$300 million in job growth is expected by 2035.

Roundtable Discussion – Bozeman VR Staff & Ability Montana

Participants reintroduced themselves before diving into key topics.

Kylah Minor, Pre-ETS Specialist, shared efforts in Belgrade, Bozeman, and Gallatin high schools, working closely with special education staff and expanding job opportunities in Livingston, Big Timber, and Whitehall. She emphasized employer outreach and job matching based on student interests and abilities.

John Kudrna, VR Counselor Supervisor, identified lack of awareness about VR services as a major employment barrier, noting improvements now that staffing shortages have been addressed. With new jobs emerging from the Tech Hub, he sees VR counselors becoming community ambassadors for change.

Anne Everett, VR Counselor, highlighted Bozeman's high housing costs and homelessness as key challenges. Even degree-requiring jobs often don't offer a livable wage, prompting her to explore housing resources for clients.

Kylah added that transportation gaps and employer perceptions of disability are significant hurdles. She stressed the need for businesses to focus on abilities rather than limitations, acknowledging Bozeman's big-city challenges, including homelessness and mental health support.

John closed by noting VR's expanding resources and partnerships, growing from two CRPs in 2020 to five, with a sixth in development.

Darrel discussed employer outreach, particularly in tourism and tech, and VR's collaboration with SHRM and the Bozeman Chamber of Commerce to reshape perceptions of disability in the workforce.

Allyson noted that Shawn Tulloch, Deaf Program Manager, based in Bozeman, manages a statewide caseload of 36 individuals with hearing impairments.

Day 1 Wrap-Up

Before today's meeting was adjourned, discussion was had on upcoming meeting dates and locations, accessibility of those locations, legislative session topics and dates, joint meetings, and scheduling conflicts. Tomorrow's agenda was also updated to include discussion on the SRC recommendations and filling in the open committee chairs.

Day 2: November 15, 2025

Ground Rules and Order of Business discussion

Member Moment:

June Hermanson shared her story for today's Member Moment.

Reports:

Federal & State Reports-Chanda Hermanson

Chanda reported that right now Montana VRBS is working with Commissioner Allen at the RSA and Director Williams at OSA to see their priorities through to the end of the current administration in January. Those priorities are Artificial Intelligence, Storytelling, and Collaboration. She also shared the change in the Department of Education and how this impacts VR services. She said the current resolution will go through March to allow for the new administration to develop their own budget. Chanda shared how letters had been written to congress about budget maintenance and the impact of the COLA adjustment. She said that caseloads have increased nationally by 20% and how the cost of living and SS wages have been effected as well. Chanda additionally shared that the bill to eliminate subminimum wage did not go through and asked that we get advocates on board to sponsor that bill. Chanda said they are drafting a contract with an institute to facilitate a work group over the next year to develop a conversion plan for Montana to either eliminate or reduce options for segregated employment.

Budget Report-Anna Gibbs and Shannon Mackey

Anna began by sharing her screen and slides. She showed the two pots of money, yellow, fiscal year '24, and blue, fiscal year '25 (see slides). The blue money, FFY 25 grant is unknown. The full amount of the yellow money is 13.8 million, and the state share, 3.7. The pie chart showed how the federal fiscal year award is 13.8 million. Of this total, the Pre-ETS services set aside requirement is 2 million, leaving 11.7 million for general funds. The required state share is 3.7 million. As of the end of September, a total of \$9 million has been spent. The breakdown is \$4.6 million on general VR, 3.7 state general fund, 663,000 federal Pre-ETS set-aside.

The Ticket to Work reimbursement collected in the federal fiscal year '24 is \$929,000. The breakdown of current expenditures of the yellow money, the total spent is 9 million, the remainder is 8.5 million of all the funds combined, state share and federal share. It breaks it down into the categories of expenditures, personnel made up 28%. Non-personnel services, such as rent and operations, made up 27%. Client benefit services made up 45% of total expenditures.

Shannon Mackey, the budget analyst, gave a breakdown of the SRC committee expenses. This will be a report given to the council at the end of each federal fiscal year (Oct 1-Sept 30) going forward. Shannon's report gave us three years' glimpse of how money was spent and the breakdown of SRC expenses.

VRBS Report-Allyson Talaska

Allyson shared that she is the new General VR Bureau Chief and that she is grateful for the team she has working with her. She gave the council a little of her background in Voc. Rehab and in

mental health along with her education and employment relevancy. Allyson said that from listening to yesterday's discussion, she derived that the council was primarily interested in the number of clients and the size of counselor's caseloads. She shared that as of November 14th, the VR program is currently serving 3,616 participants statewide, and there are 181 applicants with an additional 321 people who have been determined eligible and are awaiting a plan. She said it is difficult to demonstrate caseload size due to the difference across the state with rural areas and travel times. She gave an update on providers and the "Work as a social determinant of health" project. She spoke about how the individualized placement and support expansion is moving forward on partnerships with behavioral health and programs such as Boy and Girls Club, Mountain Home Montana, and Many Rivers. Allyson spoke about a conference that she and Darrel attended in Tulsa.

BLVS Report-Darrel Hannum

Darrel shared that summer was busy with job fairs, health fairs, and statewide assessments for older individuals in blind programs. The assessment outline is complete, with testing set for February.

A new adjustment to the blindness program will support independent living and non-employment skills for individuals under 55. They are also exploring a mobile service unit (RV) to teach life skills without entering homes, though in-home services remain an option.

Staffing is near full capacity, with only a driver's position open. Darrel highlighted the Summer Orientation Program (SOP), a four-week dorm-style training through the Montana Association of the Blind.

In Billings Benefits Planning, there have been 60 new referrals since the last SRC meeting.

The Business Enterprise Program is updating policies, facing challenges in finding a Montana-based repair technician, and collaborating with South Dakota and Missouri mentors. Vendors are involved in policy development through monthly meetings.

Business Services staff, Sherry and Jacob, have been engaging in clinics, job fairs, and Chamber of Commerce collaborations to support employers. A key focus has been the Business Service Conference, which has encouraged participation in the Business Service Specialist role. A Department of Labor speaker helped spark discussions about Pre-ETS and employment partnerships with schools.

For Disability Mentoring Week in October, a student shadowed the governor for 20 minutes, and another aspiring sound engineer gained valuable experience. Darrel and Chanda reported 120+ work-based learning experiences during the week.

Chanda added that 60 clients are currently in self-employment status.

Pre-ETS Report-Tammy Hogan

Tammy introduced her Pre-ETS Specialists and outlined strategic goals, including increasing youth engagement in vocational exploration and work readiness. The strategy focuses on strengthening relationships with education entities to boost awareness and participation in Pre-ETS.

At the recent Pre-ETS retreat, Gabe, the Work-Based Learning Collaborative director, shared valuable resources for students and teachers. Another goal is leveraging the Capacity-Building Institute to enhance partnerships.

Tammy highlighted Disability Mentoring Week, where over 100 students participated in job shadows, worksite tours, informational interviews, and workplace presentations.

A key objective is increasing foster youth participation. VRBS has seen a 109% increase in foster youth engagement, with ongoing collaboration with Child and Family Services to track progress.

Currently, 116 schools are involved, with 13 newly added. At this year's MYT conference, 195 students registered, 82 attended, and 40 toured Great Falls College, exploring welding and CDL programs.

Tammy presented data on Pre-ETS participation:

- 94% (2,064 of 2,205) students with disabilities received Pre-ETS.
- 1,704 students are eligible but haven't applied, while 360 have applied for VR.
- Pre-ETS services breakdown: Job exploration (21%), work-based learning (18%), postsecondary counseling (20%), workplace readiness training (20%), and self-advocacy instruction (21%).

They continue refining data accuracy and ensuring all eligible students are recorded and supported.

Extended/Customized Employment-Lacey Conzelman

Customized Employment (CE)

Lacey reported that new training for Customized Employment is set to launch in January, developed by Cheri Anderson using a Minnesota-based model. The in-house training will be free for providers working with active VR clients.

- The first training will include five providers and five VR counselors to learn together.
- It's a 14-week process:
 - First 12 weeks: Discovery process (training every other week).
 - Final 2 weeks: Back-to-back sessions on customized job development.
- The Customized Employment contract will be renewed to align with the new training, adjusting the scope of work and fee schedule.

- Training will be provided by VR and will certify providers at no cost.

Extended Employment (EE)

Lacey reminded the council that EE services are only available to VR clients who need long-term employment supports after their VR case closes—but EE is not a VR service.

- EE funding is limited:
 - \$1.1 million, all state general funds (no VR budget contribution).
 - Funds must be used or lost; no expansion funding is available.
- Balancing service levels:
 - Providers are encouraged to adjust services based on client needs.
 - Unlike VR, EE services are not pre-authorized.
 - Clients are assessed for other long-term funding sources (e.g., DD cost plan).
- 2024 EE Program Updates:
 - Six clients moved into the EE program (four on Nov 1).
 - 22 people remain on the EE waiting list, all employed and still receiving VR support.
 - VR can fund general supports for up to 24 months, and youth for up to 48 months.
- Budget Monitoring:
 - Shannon Mackey explained that EE funding operates on a "use it or lose it" basis.
 - The program follows the federal fiscal year (Oct 1 – Sept 30).
 - A workbook system is used to track daily expenditures and improve budget oversight.
- CRP Participation:
 - Currently, about 50% of CRPs offer EE services.

Day 2 Wrap-Up:

Gabielle and Corinne led the conversation on the SRC Recommendations for VR.

Lacey C. shared that the previous ones were developed from last year's strategic plan strategies for the SRC recommendations.

Corinne suggested that, due to the length of time that was being spent on this, we schedule another meeting for those who would like to participate. A meeting was arranged for Thursday, November 21st, at 9:00 am. Members who agreed to participate were Gabrielle, Corinne, Doug, Jennifer, and June.

Due to absent members, the decision was made to submit "headshots" for the website rather than a group picture.

Gabrielle agreed to clean up the August minutes to submit for approval at the next council meeting in February. Doug motioned to wait until the February meeting to approve the August minutes. Corinne gave a second to the motion. The council voted in agreement.

A discussion was held on the appointment of the new council members. They will receive a letter from the governor's office when they are officially appointed.

Election of Committee Chairs and Functionary

For the chair of the Policy, Procedures, and Personnel Development Committee, Allyson Talaska nominated herself as a replacement to the previous staff who held the position. There were no other nominations. The council voted and appointed Allyson to the Chair of this committee.

For the chair of the Education and Membership Committee, Corinne nominated Tommy Roberts. There were no other nominations. The council voted and appointed Tommy to the Chair of this committee.

For the chair of the Planning and Review Committee, Doug nominated Joleen Weatherwax. There were no other nominations. The council voted and appointed Joleen to the Chair of the committee.

For the position of Functionary, Corinne nominated Doug McElroy. There were no other nominations. The council voted and appointed Doug as the SRC Functionary to take the meeting minutes.

Corinne adjourned the meeting.

Next meeting dates and locations:

- February 13-14, 2025, in Helena
- May 14-16, 2025, joint SRC/SILC in Missoula