

**Montana State Rehabilitation Council Meeting  
Red Lodge, MT  
February 8-9, 2024  
Meeting Minutes**



**In Attendance:** *In Person:* Anna Gibbs, Lacey Keller, Kendra Joyce, Kristi Gorski, Corinne Moore, Heather Tusberg, Jen Bernhardt, Lacey Conzelman, Rebekah Serrine, Tommy Roberts *Virtual:* Chanda Hermanson, Marcy Roberts, Celina Cline, Darrel Hannum, Brook Hodge, Jacob Kuntz, Gabrielle Broere, Shannon Mackey, Kathy Hampton, Doug McElroy, Jean Schroeder, Barb Lowney

**Absent:** Joleen Weatherwax, John Gorton, Brian Tocher, Jennifer Owen  
Sarah Seltzer

***Staff and guests:***

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

**Announcement:**

Meeting minutes from the August meeting were approved by all.

**Public Comments:**

No Public Comments.

**New Member Update:** Corrine reported that Wes's previous position is being potentially filled by Jennifer Owens. Corrine is working on SRC orientation. Lacey reported that June Hermanson is on the SILC and has applied to be the SILC representative for SRC. Chanda re-applied to be on the SRC since her term was up.

**Minutes:** Motioned to move and approved meeting minutes. All in favor.

**Announcements:** Lacey had one announcement and how we have talked about not really having training in terms of what our roles and responsibilities are. There will be training videos today and tomorrow all about the responsibilities of SRC members. Any non-members of the meeting are welcome to attend these training sessions but are not required.

**Public Comment:** None

Committee Reports:

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

Marcy reported on this committee via zoom. She reminded the committee the duties of this committee including writing the Governors report. This committee met on Monday of this week and reviewed their duties. Much of the time has been spent on the Governor's report and how to make that better. Over the past years there have been a lot of improvements made to this report. Thanks to the changes, this is no longer as large of a task as it used to be. The other responsibility of this committee is to review the state plan. Reviewing this plan will help with the Governor's report. Everyone should have received the most recent Governor's report. This year photos of real Montanan's and there were some color changes. Marcy requested that each committee read their roles and responsibilities.

### **Education & Membership-Bylaw Changes/Edits, Corrine Mooore**

Corrine reported on this committee and informed SRC that there are 3 advocacy community positions currently open and asked to get ahold of Corrine. There is one additional business industry and labor open but Wes was planning to apply for this position originally. This committee did not meet. Corrine talked about how it is important to get a more well-rounded orientation for SRC. She has set up training videos to help overview what the purpose of the SRC is. All forms and orientation packets are online. Now all documents are online to make this easier to update. A welcome packet for new members might be nice with a brief introduction to SRC and the mission. Lacey Keller suggested maybe a welcome powerpoint with links. Corrine will work on this. Corrine will review the manual and the bylaws for the annual review/edit. Marcy reports that it can be hard to find the SRC web link but we have to stay within the DPHHS website so an explanation of how to find this would be helpful.

### **Consumer Satisfaction & Needs Assessment, Celina Cline:**

Celina reported the members of this committee. Celina reported on the consumer satisfaction survey and how that has changed in order to get a better response rate. Celina reports that it has been decided to move forward with using synergy for the survey. They have better follow up and it is hoped that this will increase the response rate. This is at a stand still right now but has been requested to move forward with this. Lacey reported that at the August meeting that the SRC made a motion to allow VocRehab to move forward with contracting this out to gather survey data. This consulting group is made up of former VocRehab employees and the founder is also involved with rehabilitation. So they know the VocRehab program really well and why these surveys matter and how to do it most appropriately. Getting this data will be important to targeting where improvements can take place in VocRehab to better serve the clients. Having stronger data will also help to reduce contracting for the statewide needs assessment.

### **Policy, Procedure, & Personnel Development, Brook Hodge:**

Brook reported on updates with this committee. This committee met in January. She reviewed the members of this committee. One of the topics in this meeting that was covered was how to send out all of the policies and procedures for VocRehab. This was sent via email and has all procedures in alphabetical order. Brook will forward new policies and procedures as they are created or reviewed and edited. Another topic that was covered was brain injury training. Kathy shared about the training that she had taken on brain injury and how to best serve them. Kathy reports that it is important to adapt and do things that meet the individual's needs including putting things in writing and sending it to them. Kathy sent this training to Brook and Chanda and recommended that VR counselors take this training. Kendra shared that AOTA also has resources in regards to helping individuals who have experienced a brain injury. This committee also reviewed the procedure writing process. Chanda invited the committee members to join in on the next meeting of writing a procedure on February 13th. This committee also talked about being more consistent on meeting before meetings and having a more structured agenda on what will be discussed. Tommy thanked the committee for bringing awareness to brain injury due to his own personal experiences.

#### **SRC Training Videos (First Half), Corinne Moore:**

Refer to link below.

<https://catalog.ii-training.org/product?catalog=1635282032uTjPR>

Notes:

Tommy suggested making these videos and powerpoints available to new members. He reports that when he joined he felt lost with what the purpose was. He states that these videos have answered a lot of questions that he had.

#### **CSNA, Strategic Plan, and State Plan Updates, VR Staff:**

The CSNA is required to be completed by Voc Rehab every three years. It reports the results in the state plan. In this plan findings are reported on four main areas. Once the statewide needs assessment is completed, those finds are taken as recommendations to use to guide the strategic plan. Everyone on the SRC board was invited to join the VR staff in completing the strategic plan the first Friday of January. At this meeting the findings from CNSA were reported on and then discussions on what to prioritize as far as activities and objectives were also discussed.

#### **Performance Measures, Anna Gibbs:**

Anna began by reporting on why we have performance measures. The performance measures help an organization know why an organization does what they do and their purpose and how successful they are at achieving their mission. Anna shared several quotes that described deeper performance measures from the Harkin Center Report. "The Harkin Report set forth a vision for VR. It created high expectations for individuals with disabilities which cannot only increase confidence and self-sufficiency of such individuals, but also lead to enhanced employment

opportunities and upward mobility in the workforce”. Anna then shared the regulations that VR programs must work within. The WIOA state plan includes six programs; Title I, adult labor, dislocated worker and youth, Title II adult ed, Title III Wagner, under labor, and Title IV, state rehab programs. Performance measures tell us if we are accomplishing what we are really set out to do. Performance measures are in terms of a numerator and a denominator. Anna discussed figures showing Montana’s performance status in all categories.

### **Economic Development, Billings VR Staff:**

Heather reported that she is in her third year employed but she recently accepted the supervisor position. Jen Bernhardt is one of the VRCs. Jen covers Carbon and Stillwater counties. The Billings office has large caseloads they are working for. The Billings office has been short staffed for about a year and a half. They just lost their administrative supervisor of 33 years. They are starting to fill positions. They work to continue to build strong relationships with the special educators in their areas and the organizations that support their same populations. Billings has been chosen for one of the pilot programs for the IPS program. This program will begin by starting out at the Yellowstone Boys and Girls Ranch. IPS is a model of supported employment. It will guarantee that they have all the services to get them employed but to keep them employed since they’re one of our more difficult populations to not only place but sustain employment. How to better support individuals struggling with mental health was discussed. Jen discussed that she really tries to make sure she is staying in her lane. That she is not a mental health counselor. She talked about these cases requiring additional support and time management.

### **SRC Training Videos (Second Half), Corinne Moore:**

Refer to link below.

<https://catalog.ii-training.org/product?catalog=1635282032uTjPR>

### **Member Moment, Lacey Keller:**

Lacey reports that she thinks she knew from a young age that she wanted to work with people who have a disability. Lacey grew up in Montana. In middle school Lacey’s teacher had a daughter that had a disability and every morning there was a high school girl who would walk his daughter to the elementary school for class. She loved how happy the two of them both always were. The teacher asked Lacey to take over this job the next year. Lacey was a special education teacher in Luther. She loved that. After having kids she was a stay at home mom for a while. She applied for the Independent Living Specialist position in Bozeman in 2012 and got the job. She worked in Bozeman for a few years and then moved to Ennis. She spent some years as a preschool drafter for four years, until she started to feel burnt out. She called her former supervisor for ideas of work. Her supervisor offered for her to come back and work remotely from Ennis. She became the Independent Living Specialist Program Manager. She loves working for the Center for Independent Living.

**Federal & State Reports, Chanda Hermanson:**

Chanda started by reporting an update that Erica Johnson, her boss, had resigned and recruitment was under way. RSA appointed a new commissioner in December. His name is Dante Quinn Allen. He was the previous manager of ABLE in California. He shared that he will be acting with a sense of urgency for the next two years to enhance and hold people/agencies accountable. Chanda reported that the executive planning process was about to kick off. This process had already started in the division. The executive planning process is referred to as EPP in the state government. It is the process in which programs such as VR develop ideas to present to the governor's office to build in to House Bill 2. House Bill 2 is the governor's budget. This helps to establish FTE for Voc Rehab. The SRC could be bringing ideas to this executive planning process. SRC members could also be involved in the actual legislative session by being a voice and offering inside perspective. Chanda reported that staffing and hiring levels continue to be short but it is something they are continuously working on. Voc Rehab was able to get an entire list of youth age 14-24 in foster care for the state. They then cross-check that with all of the pre-ETS students and VR participants to get a true baseline. The true baseline is 35 and VR set a goal to increase engagement with first care youth by 50% by July 1st. They are working toward better serving Montana foster care youth. Chanda reports that extended employment for the last two years has run out of money. The difference in funds needed has been covered through the VocRehab budget but she states this cannot be a long-term solution. This will be a focus area moving forward of how to better fiscally support his program. A question was asked about migrant workers coming into Montana and how VocRehab supports that. Chanda reported that in Missoula they lean heavily on their relationships with other organizations supporting these population groups.

**Budget Report, Anna Gibbs:**

The budget report and figures below were reported on. Please reference the report attached.

## State Rehabilitation Council

**To:** State Rehab Council Members

**Date:** February 8-9, 2024

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

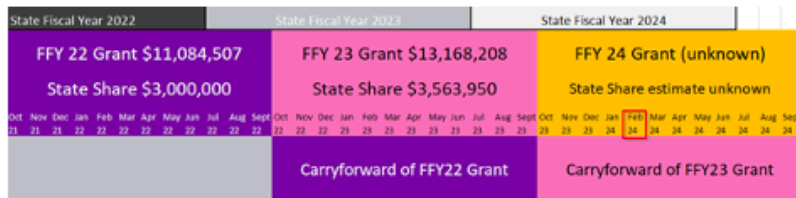
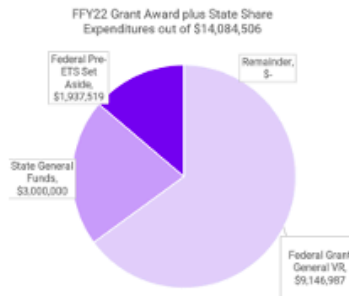


Chart showing Federal fiscal years purple, pink and yellow

### FFY 2022 Award

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

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



### FFY 2023 Award

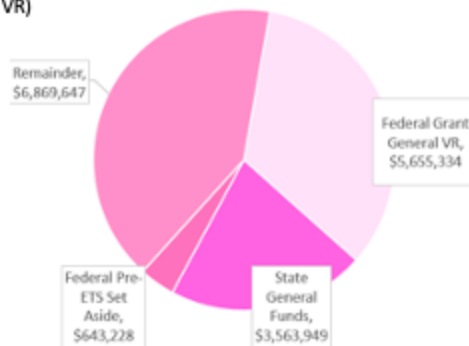
Our FFY23 federal award is \$13,168,208. Of this total, the Pre-Employment Transition Services (Pre-ETS) set-aside requirement is \$1,975,231 which leaves \$11,192,977 for General VR. The required State Share is \$3,563,950.

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 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24	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																							

The VRBS program expended \$9,862,511 of the FFY23 grant as of December 31, 2023 as follows:

\$ 5,655,334	Federal Grant Funds (for General VR)
\$ 3,563,949	State General Funds
\$ 643,228	Federal Pre-ETS Set-Aside
<u>\$ 9,862,511</u>	<b>Total Expenses</b>

FFY23 Grant Award plus State Share Expenditures out of \$16,732,158



The breakdown is:

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

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 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24	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																							

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																							

		FFY22		
		Federal Fund	State Share	TOTAL
<b>AWARD</b>		<b>\$ 11,084,507</b>	<b>\$ 3,000,000</b>	<b>\$ 14,084,507</b>
	Personnel Services	\$ 3,299,622	\$ 2,005,080	\$ 5,304,702
	Operations	\$ 3,132,435	\$ 700,009	\$ 3,832,444
	Client Services	\$ 4,652,450	\$ 294,911	\$ 4,947,361
	Total Expenses	\$ 11,084,507	\$ 3,000,000	\$ 14,084,507
	Remainder	\$ -	\$ -	\$ -
		FFY23		
		Federal Fund	State Share	TOTAL
<b>AWARD</b>		<b>\$ 13,168,208</b>	<b>\$ 3,563,950</b>	<b>\$ 16,732,158</b>
	Personnel Services	\$ 1,436,590	\$ 1,775,102	\$ 3,211,692
	Operations	\$ 1,714,598	\$ 1,003,346	\$ 2,717,944
	Client Services	\$ 3,147,374	\$ 785,501	\$ 3,932,875
	Total Expenses	\$ 6,298,562	\$ 3,563,950	\$ 9,862,512
	Remainder	\$ 6,869,646	\$ 0	\$ 6,869,646

**VRBS Report, Brook Hodge:**

VocRehab has nine offices across the state in Billings, Bozeman, Butte, Havre, Miles City, Missoula, and Helena. There are currently 10 rehab tech positions and 14 admin support positions. VR is fully staffed in seven of the nine offices. There is a vacant VRC position in Bozeman. In Butte there is a vacant VRC supervisor position. That position has been vacant for a full year. In Helena there is a VRC vacancy. In Missoula there is an admin support supervisor position open. The highest caseload for a counselor is 140 right now. VocRehab continues to have their monthly staff meeting trainings. In March, Lacey will present on extended employment and in April they will have their in-person annual all staff meeting. This meeting will take place in Whitefish. Their in-person supervisor training will also be rescheduled. Celina was chosen to participate in the lead VR training which is a national training for mid managers. Celina reported that there will be 45 participants nationwide that will attend this training. There will be 8 sessions. This training will be geared toward leadership.



**BLVS Report, Darrel Hannum:**

BLVS is trying to stay connected with their WIOA partners after the statewide presentations. They are working on getting on the JSECs. They would like to work with job service partners and adult education partners. BLVS is currently working on contracts with the Montana Association of the Blind for the summer orientation program. The National Federation of the Blind in Montana for their outreach for NFB news line. BLVS contracts with MSU Billings for benefits planning. When this was last talked about they had 27 referrals, that number moved up to 54 now. Montana vocational rehabilitation blind services is going through a rebuild of their business enterprise program and the blind vendors program. They are restructuring and going from a nominee agency to bring it in-house. Jacob Kunz introduced himself as the new program specialist position. The Windmills training continues to be a much requested program to present to employers and staff. BLVS continues to work with their job service partners at Great Falls College and ADF in Great Falls on their six-week welding training. In the current cohort they have two clients enrolled. BLVS is currently working with City College in Billings to help identify what they are doing that we can utilize in a similar manner to what we have done at Great Falls College.

**Pre-ETS Report, Tammy Hogan:**

Tammy gave an overview of the mission and team at Pre-ETS. In order to qualify for Pre-ETS the individual needs to be enrolled in a high school college or qualified education program. They also have to have a documented disability and have an IEP or 504. Pre-ETS serves students from ages 14 to 21 and also have to complete a simple two page student request form. They provide exploration of counseling, work-based learning experiences, post-secondary programs, workplace readiness training and instruction in self-advocacy. Pre-ETS is working to serve foster care participation in their services. They are also in the process of doing all of the MSG reporting for the fall semester. Pre-ETS works with the special education advisory panel and is doing work with them. They will also continue to have their STAR BASE STEM camps.

**Extended/Customized Employment, Lacey Conzelman:**

Extended employment is for individuals who need long term, ongoing employment supports to maintain employment after their Vr case exits have the option to move into the extended employment program. Extended employment is managed in-house within disability employment transitions division. There are about 260 clients receiving services through extended employment. Customized employment has previously been operated through Mark Gold & Associates to train providers to offer a customized employment. There were barriers with using Mark Gold & Associates. Cheri the business services specialist out of Miles City primarily is in charge of customized employment at this point in time. She is involved in national community of practice meetings around customized employment and through those connections learned that the

state of Minnesota has developed their own curriculum that is for customized employment and is ACRE certified. She will be the one providing the training.

**SRC Roundtable:**

The meeting closed out with roundtable discussion on things moving forward and the next meeting which is the joint meeting with SILC. It was brought up to have some additional time spent to discuss legislature and how to be more involved in that as a counsel. The other topic that was brought up was more information about benefits planning to be discussed at the next meeting. It was also discussed to show the work plan and to invite more VocRehab staff members, especially those in Missoula to give updates on their role.

**Next Meeting: Joint Meeting with SILC April 17th, SRC Meeting April 18th**