

**State Rehabilitation Council (SRC) Employment and Partnerships
Committee Meeting Minutes**
September 25, 2017

Members Present

Carol Carr
Adam Robson
Judith Castro
Jennifer Phillips
Sheri Carparelli

Members Absent

Chuck Tiller
Rob Crawford
Carlos Paraskevas

Staff Present

Lindsey Powers

Guests Present

Brandi Coffland

Call to Order and Introductions

Carol Carr called the meeting to order at 2:12 pm in the RSA Conference Room, Phoenix, AZ. Introductions were made and a quorum was present.

Approval of June 19, 2017 Meeting Minutes

Judith Castro moved to approve the minutes of the June 19, 2017 SRC Employment and Community Partnerships Committee meeting. Adam Robson seconded the motion. The committee approved the minutes by unanimous voice vote.

Self-Employment and Policy Discussion

Carol Carr stated she invited Brandi Coffland, RSA Policy Manager, to attend the meeting and discuss the draft of the Self-Employment Policy. Brandi Coffland, Rehabilitation Services Administration (RSA) Policy Manager, stated the Self-Employment Policy had been updated significantly. Ms. Coffland stated she wanted to update the policy so that staff and clients were able to interpret the policy easily. Brandi Coffland stated she updated the Individualized Plan for Employment (IPE) Development section

encompassed developing any type of IPE such as Self-Employment and would include Supported Employment. Judith Castro inquired whether the Self-Employment Policy would allow family members to assist in the business management portion of the Self-Employment plan. Brandi Coffland stated the current policy included family members as support, although the new Self-Employment Policy would explore who would provide training to support the family members with training. Brandi Coffland stated the IPE portion had been expanded to include the Self-Employment Policy. Ms. Coffland stated the old policy indicated that if a client was interested in self-employment, the counselor would still develop an IPE with self-employment as the outcome goal. She noted that she would like to change the policy to request that the client develop a Business Summary, and indicate a general summary of the business the client would like to start. Judith Castro stated when a counselor developed the Self-Employment IPE; any services were not considered self-employment services until the IPE was labeled as a Self-Employment plan. Ms. Castro inquired whether the new policy would remain the same and whether the services would go towards the funds offered for a self-employment plan. Brandi Coffland stated the counselor would develop the IPE and the services required. Ms. Coffland stated the counselor would not request any services that would go towards the self-employment plan until the self-employment plan was approved. She noted at that point the \$5000 or \$18,000 would go towards the self-employment plan. Adam Robson inquired whether a client could develop a Business Summary at any point in his or her VR services. Brandi Coffland stated a client could develop a Business Summary at any point. Carol Carr inquired whether RSA would develop a form to guide the clients when developing their Business Summaries. Brandi Coffland stated RSA could develop a Business Summary template. Ms. Coffland stated clients could develop their own Business Summaries, or with the help of a counselor or community resource. She noted that VR staff, the supervisor, or a vendor could review the Business Summary and evaluate the summary.

Brandi Coffland stated she was requesting feedback from the committee regarding how strict the Business Summary should be. Brandi Coffland stated if a counselor was unsure about a client's Business Summary, the VR staff would arrange a formal meeting with the client and the small business contracted vendor, such as Wedco. Carol Carr inquired whether RSA had reached out to the business department at any of the universities to identify a student that would be willing to review the Business Summaries. Adam Robson stated his concern that a college student would not have any experience working with individuals with different disabilities. Brandi Coffland stated RSA was trying to identify small businesses or entities that would be willing to offer assistance. Adam Robson inquired whether the State had a contract with Score. Brandi Coffland noted the State did not

have a contract with Score, although clients did receive services through Score. Sheri Carparelli stated as a small business owner, she would be willing to offer guidance or advice to anyone. Carol Carr inquired whether the State had a contract for small businesses. Brandi Coffland stated the contract was for small business consulting. Ms. Coffland noted that clients were not required to use small businesses to develop their Business Summaries, and they were able to develop their own Business Summary.

Judith Castro inquired whether a client could submit a Self-Employment plan if there was no labor market information regarding the client's job goal. Brandi Coffland stated the Business Summary would include labor market support to indicate a need for that job. Ms. Castro inquired whether a procedure existed for a counselor to decline a Business Summary due to a lack of labor market support. Brandi Coffland inquired whether the Business Summary be used to approve or deny the Self-Employment plan. She noted if the client wanted to achieve an employment outcome with no labor market support, the counselor should deny the self-employment plan and give the client the request for review to appeal the decision. Judith Castro stated she was unable to locate the procedures for denying a client's self-employment plan in the current Self-Employment Policy and would benefit from those instructions. Brandi Coffland stated the previous policy included some of that information, and she would add that information back into the policy. Adam Robson stated some clients would not have the ability to describe their self-employment goals. Brandi Coffland stated the Business Summary should offer a general idea of the self-employment plan or the type of business the client was interested in. Ms. Coffland stated in the development of the IPE, the counselor and client would research the employment goal at the beginning in order to develop the Business Summary. Carol Carr inquired whether RSA had a self-employment assessment tool. Brandi Coffland stated several small businesses and online resources offered self-employment assessment tools. Brandi Coffland stated RSA offered small businesses that offered self-employment assessment tools, although RSA could consider offering an example for counselors and clients. Brandi Coffland stated RSA developed an IPE information handout for clients and she hoped to include information regarding Self-Employment Plans and to provide information once the policy had been developed. Brandi Coffland stated she would include information indicating that if a counselor wanted to deny a self-employment plan, that the counselor should meet with the supervisor first. Adam Robson inquired whether a self-employment should be denied due to a lack of labor market support. Brandi Coffland stated the client would need to show that there was a demand for that type of business.

Carol Carr inquired how RSA identified the self-employment plan amount of \$18,000. Brandi Coffland stated that amount had been included in the

policy for years, which was actually higher than most states. Adam Robson inquired regarding the average business plan amount. Judith Castro stated some banks would offer loans to individuals with disabilities to cover any additional costs over the amount allocated. Brandi Coffland stated RSA did not generally encourage clients to obtain loans, although clients could be directed to a resource list. Brandi Coffland stated the policy included the general items that the Business Plan should include. Adam Robson inquired whether RSA reached out to the small business contractors for examples of Business Plans. Carol Carr stated she used a software package that guided the development of her Business Plan. Brandi Coffland inquired whether the policy should include the minimum of items that should be included in a Business Plan. Carol Carr stated that counselors and clients would benefit from knowing the basic items to include in a Business Plan.

Judith Castro stated the counselors in the Yuma office that were currently working on self-employment plans were under \$5000. Ms. Castro stated one of the counselors would meet with Odyssey to present the Business Plan. She noted that the counselors were unsure how to determine when the client's case could be closed successfully. Brandi Coffland inquired whether a \$5000 Business Plan would look different from a \$18,000 Business Plan. Brandi Coffland stated the Business Plan should include specific items, and noted the policy could include that information. Carol Carr stated most of the software used to develop a Business Plan would ask leading questions to assist the individual with creating a business plan. Adam Robson inquired whether clients would always go through a consulting business such as Score as a comparable benefit. Brandi Coffland stated a client should utilize the comparable benefits first.

Brandi Coffland inquired whether RSA should continue to use a Self-Employment Plan Committee to review the self-employment plans. She added if a committee was required, who should be on the committee, or could the counselor and supervisor review the self-employment plan. Adam Robson stated the review committee might be beneficial in case one VR office historically denied self-employment plans. Brandi Coffland stated the individuals on the Self-Employment Plan Committee included individuals from different fields. She noted her understanding that the committee met once a month and if a client missed the meeting, the client would have to wait for the next meeting. Brandi Coffland stated RSA management welcomed any feedback regarding alternatives to a Self-Employment Plan Committee.

Adam Robson stated a self-employment plan under \$5000 required the counselor, supervisor or manager review the self-employment plan. Mr. Robson inquired why a client would be required to present to the Self-Employment Plan Committee if the plan was over \$5000. Brandi Coffland

stated the Self-Employment Plan Committee should be able to offer more guidance or ask additional questions that a counselor and supervisor might not. Judith Castro inquired whether a client could reapply for services to get additional materials if his or her case was closed successfully. Brandi Coffland stated the policy could include language that indicated a client's business plan should include all the materials needed for a twelve month period to prevent an individual from requesting additional materials. Brandi Coffland stated the Business Plan should include all of the necessary equipment and materials, which would be purchased while the client was receiving VR services. Adam Robson inquired whether twelve months was a long time in which to keep a client's case open. Carol Carr stated most small business owners needed about three years to become profitable. Carol Carr inquired regarding the criteria that would determine whether the client was self-efficient. Brandi Coffland stated the client would establish their desired income during the Business Plan, although some clients might require more time. Adam Robson suggested the client identify when he or she was self-sufficient and then the counselor could close the case after 90 days. Brandi Coffland stated most clients don't want their cases to be closed, and the counselors want the clients' cases to close successfully. Brandi Coffland stated the clients would be required to show that he or she was actively participating or making consistent progress, or the counselor would need to discuss alternate plans. Carol Carr stated the clients should be able to prove themselves. Adam Robson stated the policy should include a timeframe in which the client needed to be self-sufficient to prevent the clients from remaining in VR.

Agenda and Date for Next Meeting

The next meeting of the SRC Employment and Community Partnerships Committee will be on Monday, January 29, 2018 from 2:00 pm to 3:30 pm in the RSA Conference Room, Phoenix, AZ. Agenda items are as follows:

- Self-Employment Policy Discussion

Announcements

There were no announcements.

Public Comment

There was no public comment.

Adjournment of Meeting

The meeting was adjourned at 3:30 pm.