

**State Rehabilitation Council (SRC)  
Program Review Committee Meeting Minutes  
November 13, 2019**

**Members Present**

Ana Nunez  
Dave Cheesman  
Scott Lindbloom  
Melissa Wojtak  
John Gutierrez

**Members Absent**

**Staff Present**

Lindsey Powers

**Guests Present**

Jami Lemmer  
Lisa Adamu

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**Call to Order and Introductions**

Ana Nunez called the meeting to order at 10:10 am in the DERS Conference Room, Phoenix, AZ. Introductions were made and a quorum was present.

**Approval of October 8, 2019 Meeting Minutes**

Dave Cheesman moved to approve the minutes of the October 8, 2019 SRC Program Review meeting. Scott Lindbloom seconded the motion. The meeting minutes were approved by unanimous voice vote.

**Individualized Plan for Employment (IPE) Policy Discussion**

Ana Nunez stated the Program Review Committee had reviewed Chapter 6 of the Vocational Rehabilitation (VR) Manual and had divided up the sections among the members. Ana Nunez stated her understanding that Scott Lindbloom had some questions regarding his section of the chapter. Scott Lindbloom stated he had printed out about 400 pages of the Workforce Innovation and Opportunity Act (WIOA) regulations and was able to compare those to the IPE policy. Scott Lindbloom stated that SRC members would benefit from receiving training on WIOA. Ana Nunez stated that community

organizations had provided training on WIOA, and any future training could be shared with the council.

Ana Nunez stated that Melissa Wojtak reviewed section 6.1 and inquired regarding her feedback. Melissa Wojtak stated she could not find the correlating information in the Federal regulations that related to the what VR staff would need to develop an IPE. Dave Cheesman stated that counselors did not require the documentation that proved an individual was legally able to work in the US to write an IPE, but the individual could not receive services without that documentation. Jami Lemmer stated that a counselor could open a case without the documentation, although the individual could not receive services without the documentation of legal ability to work. Jami Lemmer stated that Federal regulations did not offer clear guidance, and that section could be clarified. Lisa Adamu inquired regarding situations when an individual was hired but had not received the documentation. Jami Lemmer stated any individual would be required to have that documentation prior to seeking employment. Lisa Adamu stated an employer could turn in to the form for verification, but the documentation could be pending. Dave Cheesman stated an individual could receive documentation from the Social Security office indicating that the individual was waiting on the formal documentation. Ana Nunez inquired regarding the counselor's role in reporting an individual that was in the US illegally. Jami Lemmer stated a counselor was not required to report an individual and would only be concerned whether the individual was legally able to work in the US. Lisa Adamu suggested the policy verbiage be clarified to reflect the role of the counselor. Jami Lemmer agreed and noted that issue had come up before. Jami Lemmer stated that RSA was required to provide a WIOA report that included the client's identification number, which would indicate anyone not legally able to work in the US. Ms. Lemmer stated that counselors could also be referred to the Code of Ethics, specifically, the rule, "Do no harm".

Melissa Wojtak stated that section 6.2 was straight forward and discussed the 90-day window for developing the IPE, and the one-time extension. Ana Nunez inquired whether the 90-day requirement had changed. Dave Cheesman stated the requirement was 120 days previously and was now 90 days. Jami Lemmer stated that the goal was to develop the IPE within 60 days, although 90 days was the requirement. Melissa Wojtak inquired whether it was easier to amend an IPE or develop an extension. Ana Nunez stated that both processes were cumbersome, and noted the IPE was a living document, and was intended to be updated as needed. Jami Lemmer stated that some clients' goals were Customer Service, because they did not know their employment goals, although the Federal regulations required the IPE include a goal. Dave Cheesman stated that counselors tried to narrow down the employment goal as much as possible, and were able to amend

the IPE as needed, although the individual would be required to resubmit forms.

Ana Nunez stated that she was responsible for reviewing Section 6.3 and noted the Policy and Procedure were repetitive. Ms. Nunez stated that page 72 listed the individuals that could assist in the development of an IPE, and suggested the list include and/or, to indicate that more than one individual could assist. Lisa Adamu stated the list under 2a) could be condensed to include the individual's capabilities and abilities. Jami Lemmer stated that information was pulled from the Federal regulations. Ana Nunez stated that 2.1 discussed the economic need and suggested the policy include a reference to the Economic Need policy. Jami Lemmer stated the Economic Need chapter was cumbersome and would be revised. Ana Nunez inquired whether the community referral indicated a supplemental resource to DB 101. Jami Lemmer stated that a community referral would provide a deep dive of DB 101. Lisa Adamu inquired benefits counseling would extend to supplemental insurance. Dave Cheesman stated counselors would assist clients to obtain benefits or learn about money management.

Ana Nunez stated that 3) referred to the required elements of the IPE and inquired whether those would have different forms. Dave Cheesman stated there would be different drop-down menus. Lisa Adamu stated that 6.4 referenced the Supported Employment and suggested the information refer to the Business Plan. Jami Lemmer agreed and noted that staff had mentioned the difficulties in referring and forth in the manual. Ana Nunez stated that 3b) discussed the specific employment outcome and inquired whether the counselor could include a career cluster or whether the occupation should be included. Dave Cheesman stated that counselors should be as specific as the employment listed in the ONET. Lisa Adamu inquired whether the policy included verbiage indicating that plans should be generally and morally accepted. Jami Lemmer stated that some clients wanted to begin companies growing marijuana or hemp and were not permitted due to the state receiving federal funding. Lisa Adamu stated the policy could include verbiage to indicate that the counselor was not biased, but policy did not permit certain businesses. Ana Nunez stated that page 76 discussed what to consider when writing an IPE and suggested that parts 1, 3 and 5 be grouped together due to all items being related to data. Ms. Nunez noted the website under 3a) had a parenthesis after the website address but not before and suggested that be eliminated or added to both ends.

Ana Nunez stated that when a counselor was developing an IPE, the counselor should also be considering the abilities of the client, and suggested the policy include more specific information regarding the training

or education required to obtain employment. Dave Cheesman stated that counselors also provided job coaching to clients. Jami Lemmer stated that RSA would develop Standard Work for different processes such as development of an IPE. Lisa Adamu inquired whether the policy should reference the Post Employment chapter. Jami Lemmer agreed that a reference could be included. Lisa Adamu inquired whether the current Policy and Procedures layout would remain the same. Jami Lemmer stated that RSA would loosely use the Department of Economic Security (DES) policy format to modify the RSA policies. Ms. Lemmer stated the policy would include the policy statement, the authority (the regulations), the applicability, and the standard. She noted the template would be straight forward and would eliminate the cascading formatting.

Dave Cheesman stated he was responsible for reviewing section 6.4, which discussed supported employment and noted the inclusion of short-term employment goals, with the goal of obtaining competitive integrated employment. Dave Cheesman stated he was able to find most of the key pieces in the Federal regulations such as the 24-months of supported employment and who would be eligible for supported employment. Mr. Cheesman inquired whether the policy would include who would be the extended payer. Jami Lemmer stated that Administration was working on identifying that. Dave Cheesman stated the policy indicated who the client could use for supported employment, and the required monthly contact between counselor and client.

John Gutierrez stated he was responsible for reviewing section 6.5 and inquired regarding the reference to Section 6.3 of the manual. Ana Nunez stated the Self-Employment was referring to section 6.3. Jami Lemmer stated the Procedure repeated the Policy, which would be changed. Ana Nunez stated that once the Manual was reformatted, it would be easier to understand and navigate. John Gutierrez inquired regarding 3a), which indicated that "the client's economic need determination applies to the family member". Jami Lemmer stated that if a client and a family member required training, both would need to meet the economic need. Dave Cheesman stated the family member would be an extension of the client. John Gutierrez stated the information did not refer to that situation. Jami Lemmer agreed and stated that language would be revised. John Gutierrez inquired regarding the training referred to in 3b). Jami Lemmer stated the training could be management, business or entrepreneur training. Ana Nunez stated the training was listed below in iii. Scott Lindbloom inquired whether RSA would offer training that would correlate to DDD policies. Ana Nunez stated that RSA and DDD developed their own policies and they would not overlap. Mr. Gutierrez inquired whether the client would be required to work with a vendor when developing a business plan. Jami Lemmer stated

that a client was encouraged to develop a business plan, although the vendor would be involved to aid, but would not develop the business plan for the client. John Gutierrez stated that he was pleased to see that page 92 indicated that an exception could be made to the \$18,000 business plan limit.

Scott Lindbloom stated he was responsible for sections 6.6 and 6.7. Mr. Lindbloom inquired whether a client with a high cost case would obtain school or training. Lisa Adamu stated that section discussed development of the IPE and the self-employment plan was discussed in the section prior. Scott Lindbloom inquired regarding Policy 1 a), which discussed how the client was expected to make consistent progress toward achieving their intermediate objectives. Dave Cheesman stated the intermediate objectives referred to the client participating in the IPE process. Jami Lemmer stated the following sections I, ii, and iii explained those goals. Scott Lindbloom suggested that that 1 b) indicated that the client and the counselor would review the progress every 90 days and suggested that be changed to 30 days. Jami Lemmer stated the policy required the counselor and client discuss the goals every 90 days to ensure that the counselor and client remained in contact. Scott Lindbloom stated the counselor should be responsible for contacting the client. Dave Cheesman stated that both individuals should be responsible for contacting each other and returning calls. Scott Lindbloom inquired regarding the required approval from the Regional Program Manager. Dave Cheesman stated that any cases over \$10,000 required supervisor approval and the supervisors were required to review cases every quarter. Scott Lindbloom suggested that the timeline be changed to "any IPEs that have been ongoing for 5 years or more", and that the i and ii be reformatted. Ana Nunez noted that the policies would be reformatted, which would be easier to understand.

### **Agenda and Date for Next Meeting**

The next meeting of the Program Review Committee will be on March 10, 2020, from 10:00 am to 11:00 pm in the RSA Conference Room, Phoenix, AZ. Agenda items are as follows: Agenda items are as follows:

- Policy Review Discussion

### **Announcements**

There were no announcements.

## **Public Comment**

Lisa Adamu stated that she looked forward to seeing the reformatted policies. Jami Lemmer stated that RSA was working with DES Graphics and Design to ensure the format was clear and did not include cascading information.

## **Adjournment of Meeting**

The meeting stood adjourned at 12:00 am.