COUNCIL OF STATE ADMINISTRATORS OF VOCATIONAL REHABILITATION

2017 SPRING CONFERENCE

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8:45 a.m.

LISA HINSON-HATZ: Good morning. Hello, directors and fearless leaders and CSAVR staffers that do it up.

Everybody have good Hill visits?

We had a great day on the Hill. We were ready to pass out when we got home. It was a long day, but it was a good day.

Welcome to the business meeting. Here we are. We've made it to Wednesday. It's been a great week.

I thank the staff again for putting together a great conference with great presenters. I heard wonderful feedback from the sessions on Monday. We had excellent participation in our committee meetings, and it's just been a great week so far.

So I'm going to pass it over to our wonderful treasurer, Russ Cusack, from the great state of North Dakota, for the treasurer's report.

RUSS CUSACK: I just love it when people refer to me as "wonderful." Thank you very much, Lisa. That's great for a morning.

Well, I get to do the happy report, the financial report, and I want to thank Theresa for sending that report out to everybody, and all the work that Theresa does to assist me and the committee to get prepared.

[Applause]

Theresa is phenomenal.

Now, Steve, you're pretty good too. You're a lot of help. But it's really Theresa who does all the heavy work.

[Laughter]

And I wanted to thank Bill Robinson and Trina Lee who are members of the budget and audit committee. They make sure my details are correct, they correct me kindly, and I appreciate them very much, so thank you, Trina and Bill.

Our report is for fiscal year July 1, 2016, through June 30th, 2017. And this is a report for this conference.

Our financial assets, total cash and cash equivalents, $1.5 million. We have brokered certificates of deposit in the amount of a little over 600,000, which brings our total financial assets for the CSAVR organization to $2.2 million.

Our revenue thus far through fiscal year 17, as of January 30th, 17, our revenue this year was 1.4 million. Our expenses, total expenses, were a little over 700,000. And dues collected was 1.1 million. And we have no outstanding dues, and boy, that really does show the work of Theresa getting out and getting our dues collected.

[Applause]

And thank you to the membership that have paid your dues on time. Some organizations actually paid two years' worth of dues, which is an okay thing too. We're okay with that.

But that is the financial report. I will be around the rest of the morning, and if anybody has any questions or any questions now, I would be happy to answer those.

Now, do I call for acceptance of the report? So I would ask that there be a motion to accept the report. Do we have one?

>> So move.

RUSS CUSACK: Second?

>> Second.

RUSS CUSACK: Okay. All those in favor, say aye.

All those opposed, speak to me later.

[Laughter]

No, thank you very much.

LISA HINSON-HATZ: So now it's my honor to introduce our immediate past President, Mark Schultz, who is my mentor I think in this process, and he's going to go through our election of the officers for this coming year.

MARK SCHULTZ: So good morning, everyone.

As past President, one of the responsibilities is to head up the nominating committee. So at this time there are two positions in which we hold elections. One is President. One is secretary treasurer. So if I'm your mentor, I apologize already because I don't know which one goes first.

STEVE WOODERSON: Your call.

MARK SCHULTZ: Okay. My call.

So we can open the floor for nominations. I also have a nomination from the committee itself for secretary treasurer. So at this time, the committee would nominate Trina Lee, the director of Oregon general, for secretary treasurer.

The floor is also open for additional nominations.

Are there any other nominations.

It's been moved to close the nominations for secretary treasurer.

>> Second.

MARK SCHULTZ: All those in favor?

I need to remind that you only directors can vote.

So with it being closed, then there's one nomination. All those in favor of Trina Lee for secretary treasurer say aye.

Those opposed?

Okay. Congratulations, Trina. Thank you.

[Applause]

At this time the committee would also like to nominate Joe Xavier, the director of California combined, for President. And I will open the floor for additional nominations. President-elect. Sorry. Wherever Robert is.

[Laughter]

Are there any additional nominations.

Okay. It's been moved to close the nominations. And seconded.

All those in favor of closing nominations, aye?

Opposed?

Okay. So at this time, we have one nomination, Joe Xavier. All those in favor of Joe Xavier for President-elect, signify by saying aye.

Any opposed?

Okay. Congratulations, Joe. Thank you.

[Applause]

And that ends the nomination process.

LISA HINSON-HATZ: Thank you, Mark.

Now I would love to introduce Lea Dias, who is going to be providing the NCSAB report.

LEA DIAS: Thank you. Good morning, everyone.

NCSAB has been very busy. Together with a very active executive committee and our consultants, we've been working to navigate the new world of blindness-specific VR services in the world of WIOA.

We've been seeking clarifications and offering suggestions regarding pre-ETS regulations as relates to agencies for the blind, advocating for strengthening funding and services in the older blind program, and of course fighting to maintain the Randolph-Sheppard priority, which continues to face significant challenges throughout our nation.

And all of these subjects and more will be addressed at our conference which start there's afternoon and runs through Friday. I hope many of you in the room will be able to stay and join us as we delve further in and hear from some great speakers and engage in some great interactive discussions around best practices for implementing WIOA in the blindness field.

We wish our employment committee chair, Allison Flanagan, the best of happiness and health in her retirement as she moves on to a new path in her life.

And I'm going to be needing to find a new employment committee chair for NCSAB. And just always to keep it short and sweet, NCSAB truly enjoys the partnership we have with CSAVR and we're optimistic that together with all of you and with the consumers that we serve, that we're going to have a bright and successful future in the VR program. So thank you very much.

[Applause]

LISA HINSON-HATZ: Great. Well, thank you both.

So I would like to start the report for the committees. We're going to go just a tiny bit out of order so that Carol can run off to another meeting. So we're going to start with Carol Pankow from our HRD committee.

Thanks, Carol.

CAROL PANKOW: Good morning. I'm also going to miss my Allison. She is the cochair of this committee, and so I was trying to think about how I could channel my best inner Reba, but I don't have that same accent.

So HRD met and we had 24 representatives. We had Dr. Finch and Roseanne from RSA. Roseanne has moved over into a new role and she is now the chief of the TAC in the monitoring unit and her team is responsible for handling the RSA mailbox, and she really recommended that we needed to use it. Because I think RSA is really not hearing from us as much as we all may think.

Federal fiscal year 19 is the next come Titian for the TA centers and the plans are to have everything in place well in advance of that so the awards are done timely.

Steve joined us to discuss the vocational rehabilitation counseling coalition, trying hard to find a way to best impact skills and talents of counselors preservice. VRCC can help crack the design of your project in your state with a local university to show the value of vocational rehabilitation counseling to customer outcomes.

We also had Dr. Susan Sherman, doing research looking at factors influencing successful outcomes. They will have a survey out in the fall.

And finally, we have been working with UA CURRENTS and they have received a supervisor academy, which will now be offered in the fall. It is not federally funded so they are doing this on their own. The cost will be $1,500, and it's meant to increase knowledge and skills for change management, developing individuals, teams, and key relationships in VR agencies. There will be three sessions. The first is a webinar. The other two sessions will be in person.

So you can go to UA currents to look that up.

And that concludes my report.

LISA HINSON-HATZ: Thank you very much.

So we vote on each of the reports?

Thank you.

So could I have a motion to accept the HRD report, please?

>> So moved.

LISA HINSON-HATZ: And a second?

>> Second.

LISA HINSON-HATZ: Alice and Andrea.

All in favor?

Any opposed?

Great. The motion carries. Thank you.

Now we have Alice coming up to report on the deaf and hard of hearing committee.

Just a plug for all the committee chairs, we are looking for several seats to be filled, and we hope that someone will come forward and volunteer for several of our committees. But if not, we're not afraid to tell you that you're going to be the committee chair.

[Laughter]

No, I'm just kidding.

You never know. I don't know how serious Robert will be about filling those posts.

ALICE HUNNICUTT: Good morning, everyone.

The deaf and hard of hearing, late deafened, cochlear implanted, etc., etc., committee met yesterday afternoon. We had approximately 20 people participate including those on the teleconferencing, which has really opened up our ability to have several individuals participate.

We are fully engaged at this point in updating the model state plan. I think it's either the sixth or the seventh time the committee has joined together to provide those updates, and with something called WIOA, it really is imperative that we move on to that.

So that's the bulk of what happened yesterday is we centered on the updates to the model state plan.

We have been having monthly meetings via teleconferencing since November, and we have scheduled monthly calls and have identified the chapters in the model state plan now through November of this year.

So we had lots of discussion around the chapter that's been updated for personnel development and the standards for the deaf language counselors out there.

And we are going to be moving forward on a topic discussion. So any of you directors who are interested in having your deaf language coordinators, state coordinator, work with us, you're more than welcome to let me know and we will share our information with them.

We're using a SharePoint with our Department of Labor in New Jersey to share the information, so it is a secure site that we're doing all the work on before, you know, it's ready for prime time. So we're working on that.

We then got updates from the National Technical Institute of the Deaf, and then from Gallaudet. And they are both working substantially on pre-ETS services to help the states in their opportunities to provide services to students with hearing loss.

Minnesota coordinator of the deaf talked about the Helen Keller institute and what they've done for pre-ETS for deafblind students as well in that state.

We then heard from Kristen Rhinehart from RSA who reported on the new interpreter training programs that have been awarded. The goal for these is to increase the number of certified interpreters, in particular interpreters of minority status to really start to reflect the diversity that is in the United States. And there's specific training for court interpreters and they're also looking at behavioral health, how to provide appropriate interpreting for those consumers, and then the deafblind tactile interpreters.

So we welcome them into our committee and hope it have updates on that. I will be sharing information with state directors as I get it around the processes and resources from those new centers.

We are looking for a cochair. Maybe a chair. So FYI. Hopefully someone can approach me. I'll give you all the information you need. At least a cochair would be great.

And we have no action items.

LISA HINSON-HATZ: Thank you, Alice.

Could I have a motion to accept the deaf and hard of hearing committee report?

Andrea.

And second?

Alan.

I'll have to look around the room because I know there's others.

All in favor?

Any opposed?

Great. Motion carries.

The next report will be from the employment committee. It looks like Sue Howell will be coming up from the fabulous state of Michigan.

Thank you for your business roundtable recently.

SUE HOWELL: Good morning. I'm pleased to provide the employment committee report, but first I want to congratulate my cochair, Joe Xavier, on his new role. Though I'm probably now going to have to channel my inner Joe as we move forward with the employment committee.

So the employment committee had a very good turnout. I did not, as some of the other chairs, count the room, but we had representatives from almost all the states on the phone and in the room.

Kathy provided a NET update regarding the 501regs. EEOC is now monitoring the regulations and Kathy has scheduled a NET call with EEOC on April 13.

The CVS virtual job fair on TAP is on April 26, and Kathy is also developing a training curriculum for VR staff.

We had two speakers with us. One was Chris Korso, who provides the TAP I.T. support. Chris also mentioned the job fair. And he also highlighted that there's going to be an update to TAP that will allow counselors to directly work with their customers on résumés, which will I think help the quality assurance on the résumés with their customer.

Our second speaker was Cecilia, who talked about the current initiatives they're working on. The website is explorevr.

Important to remember business engagement, customer training, employer supports, labor market information, their four aims.

We also discussed the takeaways from the two roundtables that have already occurred in Michigan and California with more to be planned. And we also want to make sure that folks are clear on the purpose of those roundtables, is to listen and obtain information directly from business for future training that will help guide VR as it pertains to performance metrics particularly on our effectiveness with business.

And we were pleased to hear from NETs across the country who provided regional updates, about 2-3 highlights, everything from apprenticeship to more of a focus on recruiting staff, to more intentional focus on business services.

That concludes the report. Thank you.

LISA HINSON-HATZ: Thank you, Sue.

Can I have a motion to accept the employment committee report? Clearly I've not had enough coffee yet.

Joe. Thank you.

And second?

Darin, thank you.

All in favor?

Opposed?

Great. Thank you very much.

Next we'll be having the management services report. It looks like Betsy is doing her best to run up to the stage.

BETSY HOPKINS: Good morning.

So we had a robust meeting yesterday afternoon. About 50 people attending the meeting representing 28 states.

We started off with some updates from RSA. We were joined by David Steele, Carol Dobak, and Suzanne Mitchell, who talked about some of the highlights of the FAQs guidance document of the performance for formula grants which was released in late March and that's on the RSA website.

They went on to talk about some technical assistance that they've been provided related to the budget reserve requirements for preemployment transition services and supported employment.

And they shared some examples of questions that they've been receiving. They announced that written policy guidance on FAQ documents will be coming out related to section 511. They're working with the Department of Labor wage and hour division on this joint TA document as well as guidance to states on how to document 511 activities.

Then we moved on to 5-minute updates per TA center, and I have to say, we have some fast talkers who were able to share a lot of information that's going on in the TA centers, but we really wanted to have them share some updates so we could have a facilitated discussion about how state directors feel that the technical assistance has been going through these centers.

So we started off with asking three questions: What is working well? What are the challenges and pressures? Are there TA supports that agencies are missing?

Under the working well areas, we definitely had a lot of very positive comments from the states who have been working with the TA centers, and they expressed overwhelming appreciation of their responsiveness and assistance to their states.

In particular, using the TA centers to deliver information to staff and other stakeholders was really helpful. Sometimes hearing information about WIOA and then the rules from outside entities was accepted better I guess from outside entities. So that was reported out on.

And then we had several different examples shared of how in particular the WINTAC and the JDVR TAC have helped states with various intensive projects.

Under the tensors section, states talked about not having enough time to take advantage of the technical assistance centers. The feeling is there's a lot of information coming out from TA centers and RSA and sometimes it's hard to absorb it and keep one it all, so that was one of the comments that was made.

Some of the TA supports that are missing, a couple of comments that while there was definite appreciation for the work the centers are doing, states sometimes do miss the ability to receive targeted training on specific topics for staff at times.

In response to, that the WINTAC did say if there is a need, states should ask for it and they will work with the state to see if or how it might be delivered.

There is a national clearinghouse of rehabilitation training materials where information from the TA centers is kept and there was an ask if there's a way to make a query on a specific topic that could be brought up either on this website or in some other way.

Overall we had really good discussion and information shared.

That concludes my report. Thank you.

LISA HINSON-HATZ: Thank you very much, Betsy.

Could I have a motion to accept the management services report?

Thank you, Cheryl.

And a second?

Mark. We'll get Mark in the mix. Thank you, Mark.

All in favor?

Any opposed?

Thank you.

We also talked to a little bit about how some of the TA discussions have been a bit of therapy for some of us. Just as a side note.

Moving on, I think this is like the fastest business meeting in history. It's just going fast.

So next on the list is rehabilitation research and John Connelly was great and pinched hit. Obviously since John was there to provide a sit in chair position, we have both a chair and cochair position for the rehabilitation research committee, so please consider that. There's some great work being done by our researchers, and thanks for giving the report and for being there, John.

JOHN CONNELLY: Well, thank you.

Good morning. We had approximately 25 persons attend the research committee in person and on the phone.

We ran out of room. I don't think the research committee has run out of room in a long time.

So if you want to chair this committee, you're coming in on a high note. Remember that.

Both our federal partners in the area of research were represented. We had Leslie Caplan and Tim Nuzio from NIDILRR and also Melinda from RSA.

We had seven different presentations. We had presentations from NIDILRR, Mathematica, the American Institutes of Research, and from the RRTC on employment of people with psychiatric disabilities.

One thing that NIDILRR noted that I think is important to mention is that they have several grants concerning employment, and they're not necessarily focused on vocational rehabilitation, but more and more as they're getting applications for these grants, they're seeing an increase in the mention of VR and CSAVR as people apply for these grants. So I think that's really a good thing for our field. So thank you very much.

I do want to thank the immediate past chair, Jim Marks. He was a pleasure to work with. I'm sorry he wasn't able to continue as the chair. And as Lisa said, we're looking for a new chair, cochair, so I look forward to working with whomever.

And there were no action items from the committee.

LISA HINSON-HATZ: Thank you very much, John.

Could I have a motion to accept the rehabilitation research report?

>> So move.

LISA HINSON-HATZ: Mark. And a second with Russ. Thank you, Russ.

All in favor?

Opposed?

Great. Thank you very much.

Next will be the report from the social security relationships committee, and looks like Darin is coming up.

DARIN BRUSH: Madam President, thank you. Thank you for the opportunity to chair this committee too. It's been personally very helpful to me to gain a better understanding of the social security cost reimbursement programs.

A shout out to my fabulous cochair, Trina Lee, from the great state of Oregon, without whom I couldn't do this. In addition to all her great skills, I'm convinced you must have been a court stenographer in a past life.

[Laughter]

We have eight pages of detailed notes from our meeting so you can follow along at home.

[Laughter]

Also we had at least 25 attendees and many states represented, so there was a great deal of interest.

Thank you to Robert Path from Social Security Administration who showed up with colleagues in tow to explain items and also questions.

And also leaders in the field, Joe Ashley, David Leon, their teams from the Commonwealth of Virginia without whom we wouldn't have been successful.

In quick summary, the Social Security Administration updated us on a number of issues. We had about a half dozen action items not for the field of membership but particular for our committee, so we're going to do some subsequent work in between and schedule at least one call before the next CSAVR meeting but let me just quickly review those.

First, Social Security Administration pleaded with the states to submit their ticket files electronically in an XLM format. They've caught up significantly with the backlog of VR submitted cases and encourage us all so we agreed to report that to you.

Second they're offering a cost reimbursement training on the 24-25th. Ticket to Work has a presence on the social security home page now. Social security administration home page. So if you go there you can find out information about this and everything else I mention.

If you want to attend that and can't, they will schedule trainings as needed and seemed very willing to work around your schedules.

Third, we saw late last week a copy of the VR cost reimbursement providers handbook that was released by SSA, the new updated handbook. That will get wider distribution this week and next week and they have encouraged comments and feedback to the VR help line also found at the Ticket to Work website.

Fourth, for those of you who have followed this, there have been issues with data match based on the IRS data that the Social Security Administration has had access to that was taken away for a while. We learned that that has been reestablished so we're optimistic about that but cautiously because there are, we were told, technological constraints, capacity constraints, in getting that back up to speed. So we'll check on that in the intervening months to see where we are. While we have the data, we might not be able to access it right away.

They encourage us to keep the dialogue, an interesting point. They have made such progress getting responses out, catching up on backlog, getting the data system back up, that they encouraged us to reach out to them with questions or criticism at any time, and frankly to keep the conversation aboveboard rather than critical of their operation. We feel they're making great strides forward.

We also welcomed Doug Keist on the call from WINTAC. He was asking if there were states that needed tools or templates or help with partnership plus. We suggested that we reach out to the entire field of membership, those not doing things around that that seem to have impediments to implementation. WINTAC is willing to talk and help.

Finally, just two reminders. First is the sixth disability form by SSA down in the district from 1:00-3:00. Everyone should have gotten notice of that. The conversation is around Ticket to Work.

And then finally a thank you to, again, Virginia and others who have put on the cost reimbursement training all day yesterday and for the morning today. We expanded that format and it has been -- we had more than 45 attendees to that which is more than double what we have seen in past years. So there's an interest and I know that the training has been in talking with folks yesterday has been very, very valuable.

That, madam President, concludes my report.

LISA HINSON-HATZ: Thank you, Darin. Sounds like a great and lively discussion.

Could I have a motion to accept the social security report?

>> Move.

LISA HINSON-HATZ: Alan.

And a second?

I heard Joe's voice. Thank you, Joe.

All in favor?

Any opposed?

Great. Thank you.

I do want to just remind folks that are chairs or cochairs who take fabulous notes like Trina to send your notes in to Theresa as soon as you can so we can put those up on the website and everybody can see the detailed work that went on.

Next reporting will be Andrea. And she is down here.

ANDREA GUEST: Thank you for my accommodation.

LISA HINSON-HATZ: No problem. This is what we do.

ANDREA GUEST: Good morning. The transition committee had about 60 people attend in person and another 10-15 participate by phone.

I think this is an indication of the need for continuous information and training about preemployment transition services, 511 compliance, and just transition services in general.

Jackie Hyatt from NTAC presented, and she mentioned that RSA has increased their funding and they're able to hire another person to provide additional support to VR agencies so that's a good thing.

She also promoted the capacity building institute, which typically had been held in Charlotte, North Carolina, but is being moved to Kansas City, Missouri, this year, from May 16-18. If you haven't signed up yet, you can get more information on the NTAC website.

There also may be the capability to join in via Zoom Meeting if you can't attend. They're still working on that.

All of the TACs actually were represented at our meeting and one of the other things that was exciting that they mentioned is they're collaborating on a competitive integrated employment tool kit that can be used by all of the VR agency staff.

And this I believe will be posted on the WINTAC site in the near future, so look for that.

Most of our committee time was spent with Tanya Stellar from RSA answering questions that we had prepared at our previous transition committee meeting. And we wanted to present those to her prior to the meeting so she could, you know, really come prepared to answer them and she really did an excellent job and gave us a lot of good in depth information. Rather than read all of those questions and answers, you'll be able to find all of them on the transition committee notes that will be posted on the CSAVR website.

And we really appreciate Tanya's time and thoroughness in response to our questions.

With that, there are no action items. I ask that the report be approved.

LISA HINSON-HATZ: Thank you. Could I have a motion to accept? Thank you, Darin.

And a second?

Russ. Thank you.

All in favor?

Any opposed?

Great. Thank you.

And last but not least, I would like to invite Alan up for the veterans report. And thank you, Alan, for taking on this role in this last year.

ALAN McCLAIN: Thank you, Lisa.

As you all heard, apparently it's a bit of struggle sometimes for them to get committee chairs. I was at home in bed with the flu when Steve Wooderson called on behalf of madam President. So some interesting tactics I guess to get volunteers.

[Laughter]

But it was to my great benefit and I'm very thankful for the opportunity. I've already learned so much, and it's my honor and privilege to serve in the role. Even though our committee was fairly small, when he about five states there, but we were pleased that acting commissioner Ed Anthony joined us from RSA as well as Jerry Elliott from RSA who has over the years taken a lead role in some of the collaboration and coordination in terms of services to veterans. And also from the VA, from the VRNE section there, Mr. Tim Johnston joined us.

So the discussion largely centered around how to fill the gaps with state VR services collaborating and coordinating with the services to veterans, understanding that state to state it varies considerably. But you know, not for lack of any desire to make it work well and to improve upon it.

So in the spirit of that, RSA is really asking for our help at the state level to help in a prescribed format yet to be determined a way to report to them just exactly what we're doing at the state level that would, you know, to be able to report to them on that.

So the folks from the VRNE as well as Jerry from RSA are going to be formulating perhaps with other members of the committee some ideas and helpful information.

So the message is: Be on the lookout. You might see a request possibly from the CSAVR offices or perhaps me asking for your help to just explain. We're not calling it a survey. I'm going at great lengths to not call it a survey because it will be more than that. It will require a little bit of more descriptive discussion and perhaps some success stories as to what has worked in your state. So this is my plea to you to respond when the call comes out to you.

Other than that, there were no action items.

And that concludes my report.

LISA HINSON-HATZ: Thank you very much.

Could I have a motion to accept?

Alice.

And a second?

Katie.

Thank you.

All in favor?

Any opposed?

Great.

Well, I know Steve has a couple of announcements for folks.

STEVE WOODERSON: First of all, I want to just, as we always try to do at this session, you know, our fiscal program year ends in end of June, and so this is our last major gathering of the membership before our officers rotate off.

So I just want to say thank you to our immediate past President, who is technically rotating off the officers' roles at the end of this cycle.

So Mark, thank you for the leadership you've provided, specifically Vision 2020, and many, many other activities as well. So thank you very much for your service.

I think we're still fortunate that our bylaws allow, require, mandate past Presidents that are still to be on the executive committee so we're looking forward to still having your input and maybe Robert will find another role for you somewhere along the way, I don't know.

And of course we still have Lisa, who is rotating out from her immediate President to immediate past President, but Lisa, thank you for your leadership this year as well. I know we'll have more opportunities to do work between now and the end of this year, but thank you very much for your leadership.

And I think Robert had to step out, but looking forward to him stepping in to his role in July.

And Joe, welcome to the jungle, buddy.

[Laughter]

We're really, really thankful for you.

And I just want to make a special note to speak to our friend from did you say wonderful North Dakota? Special fantabulus or whatever the word was?

I just want to thank Russ. Russ filled a really unique space, if I can be that frank. For many of you that know coming in as CEO, we had a treasurer, a lady by the name of Charlene Dwyer, who played such an important role in the transition from the past CEO to me in addition to a number of other challenges we had during those days.

So to transition from Charlene, then as she left her role in Wisconsin, for Russ to come in as treasurer, as great a job as Charlene has done, Russ then elevated that to a new level and helped me out because frankly I'm a rehab counselor. Okay? At the end of the day. And Russ, so are you. But somehow together it morphed into something even greater than we could have expected.

So I'm extremely appreciative, Russ, for your service. I'm looking forward to you mentoring Trina, who I know will be hanging on to him for a while to come, but really thank you.

So if you don't mind taking a moment to give all those rotating through a big round of applause. Thank you.

[Applause]

And don't go too far, Russ, because we may be calling and crying some late night, Trina and I.

Monday morning we had a superb presentation from the folks who put together the work matters project, as you recall. And the SEED project. And they spoke about their report.

Prior to conference, state directors had a link to that report.

But we also have hard copies of this report now. We apologize that it wasn't here Monday so you could have access to it. Can I say one -- one each. So if you want a hard copy of this, they're on the registration table, so see Danielle or Theresa.

In addition to that, Kathy, speak to the Diversity magazine. Could you do that? Andrea has a mic as well. Want to be sure you're aware of our marketing partnership, and Kathy can tell us a little bit more about that.

>> Out on the table you'll see the current issue of the Diversity.com publication around veterans. They do several publications, including one on people with disabilities and they're our new media partner and you'll be seeing more of them.

On the back of your program, I wasn't quite prepared, Steve. On the back of your program, you'll also see how to subscribe to their magazines for free through our partnership. And we will be coming out and asking for articles, and they are running an ad in their publications for CSAVR, the NET, and TAP. So thank you.

STEVE WOODERSON: Thank you.

So we are really thankful that we moved through our agenda as quickly as we did. The only fear is, don't leave us. Because at 10:30, we've got a pretty dynamic -- they're always dynamic, but I think you'll really be pleased with the presentation that's prepared for 10:30.

And I know we'll probably make this announcement again, but as we wind down the conference, we want to maintain that budget that Russ has talked about. So if you could help us by recycling your name tags, either in your holders, is that the right word? We appreciate you doing that before you leave for the day.

So madam President, that's all of the announcements I can think of.

LISA HINSON-HATZ: Great.

Well, thank you, everyone.

Please come back for that last session at 10:30, and thank you again for the opportunity to serve as the President. It's been an honor and really fun and exciting and thanks again.

So we'll see you in a little while.

[Break]

10:30 a.m.

RUSS CUSACK: Good morning. We're going to get started with the fifth and last section of our conference: "Section 511 Implementation: Making a Sharp Left Turn at High Speed."

Howdy, howdy are we making that sharp turn in the implementation of 511.

To provide this presentation, we have a panel today, and leading that will be Kim Peck of Minnesota general.

Interesting, I reminded Kim it was at the 2014 fall conference that Kim also did a breakout session on this same subject, so I think she's becoming a bit of an expert in the implementation of 511.

I don't know if that's an expertise she wants me to publicize, but I have anyway.

[Laughter]

And Kim and I have agreed that given our panel and some of the minor difficulty with pronunciation of names and we honor our panel that are here, that Kim is going to introduce the panel members, but I do want to introduce a great friend from a border state that we have great partnership with, Kim Peck from Minnesota general.

[Applause]

KIM PECK: Good morning. Yeah, I had actually forgotten about doing the presentation at the fall conference inlying for on section 511 and I think at that point in time I was just beginning to try to fully comprehend it.

I think today I'm in a much better place of comprehending what it all means than back then.

I am thrilled and certainly thanks to CSAVR for their contribution and assistance, but I'm thrilled to be able to have the opportunity to bring a panel with me today because, you know, I can tell the story, but I don't have the degree of credibility, frankly, being a VR director that kind of works primarily in administrative stuff. I thought the powerful messages come from the people on the ground.

I'll go in order. Russ you already met.

And I want to give a shout out to Russ. As I'll mention later, Minnesota general is on a order of selection and we currently have 3-4 service categories close but Russ reached out and said, we can help with those individuals who live on the border, so thank you, Russ, and North Dakota, to provide services to those who live really close to North Dakota, so thanks, Russ, for doing that.

[Applause]

Yeah, round of applause.

So sitting next to Russ, we have Abbie Wells-Herzog. Abbie has been with vocational rehabilitation services for some time. About three or four years ago we moved her into a position as our specialist on autism, because as we saw the numbers of referrals of individuals on the autism spectrum going up, we needed to have someone who had some stated expertise in that area. So Abbie does carry a small caseload, but also provides consultation and direct services and supports to other VR counselors as they're serving individuals on the autism spectrum.

Sitting next to Abbie, we have Tamir Tsogbaatar, and it's very exciting to have Tamir here. Tamir is, as you will see, both in a video and from his own words as well as from the words from his employer. He is an outcome of the work that we're doing with section 511, so I'll provide more detail there.

Then we have sitting next to Tamir, we have Margie Webb, who is a VR counselor, very much on the ground, and she has been the lead in one of our projects, what we call our way to work project, which is really what I'd describe as our learning lab in Minnesota to figure out what the VR program needs to do differently.

Margie has some very, very important things to say that I think is critical that the VR directors hear, in terms of how VR has historically operated and viewed our customers and how we need to change that up.

Then next to Margie we have Ron Szelag. Ron represents business. He is general manager for the Best Buy store in Apple Valley, Minnesota, and I can't tell you how grateful I am that he's taken time out of his busy schedule to join us today, but again, he has some very important words to convey.

And last but not least, we have Steve Ditschler. Steve actually sits on our state rehabilitation council, but also he is a member of Minnesota's workforce, state workforce board, and sits on the operations committee of that workforce board and is single handedly carrying the message about the critical inclusion of people with disabilities. So I can't express my gratitude enough to Steve for that role.

Steve also is here today representing his role as chief executive officer of ProAct, a community provider that we have enjoyed a longstanding partnership with. And Steve was willing to make his organization the petri dish, the learning lab, to figure out how to provide our services differently.

So that's the panel. They have a lot to offer, so I'm glad you're here to see what they have to say.

So I'm going to talk about the implementation of 511 in Minnesota, and the title of your slide as you see there "a very sharp left turn at very high speeds" is exactly what we're experiencing in Minnesota.

So I'll provide some details about why that is, but before I get into that gritty detail, I think it's important to set the stage for the conversation by hearing from Ron and Tamir directly via the beauty of a video that ProAct developed. So cross your fingers that the technology will work.

[Video - captioned]

[Applause]

So you know, the implementation of 511 in Minnesota is a very big deal, and I recognize that that's not the case for other VR programs across the country. I know that New Hampshire just recently repealed the ability to use the special wage certificate. We heard on Monday that the state of Maryland has implemented legislation that will phase out the use of 14C certificates over a 3-year period.

I know I talked with Russ, and they have about 1,000 people that are identified as working in subminimum wage employment, and so they've got their counselors that are just taking on the role that's required of them in section 511.

You know, I know that in fact in conversations that I've had with other directors here this week, and frankly encouraging them to stay for today's presentation, I said, you know, I think Minnesota has an important message, and I said, you know, essentially it's not all what you might believe it to be.

Minnesota has I think for some time now been viewed as fairly progressive. In fact, if you look at the American community survey, I think the data for 2014 showed that Minnesota was, you know, above the national average of employment of people with disabilities. But like so many things, the devil is in the details. This is what I mean when I say that: Minnesota, based on a report developed by WINTAC, thanks to WINTAC, Minnesota actually leads the nation in the number of individuals that are employed in subminimum wage jobs. And we're even head of California. You know, I looked at the table that WINTAC distributed and I looked at it multiple times, did some deep breathing, then took a look specifically at California. And then I had to just run some numbers. The population of California is seven times what Minnesota is, but yet Minnesota leads the way in terms of the number of people that are working in subminimum wage jobs.

And so it's frankly a sobering claim to fame, but it's important to understand how we got there. You in other the VR program, and this may sound a little controversial or a little provocative, but the VR program does not have a corner on the market of doing what's right. Minnesota has a strong disability community, and it has a very strong provider network, and it has immensely powerful and outspoken families. And those families have for decades called upon the service delivery system to provide alternatives.

So back in the '50s-'60s, families were speaking up saying state institutions are not a viable option for my loved one. So pushed the provider community, pushed the state to develop alternatives.

So by the early 1970s, Minnesota had the largest number of day service centers in the country. And that was in response to strong advocacy on the part of the families. So the provider network built a system that responded to what the families were asking for. The families were asking for day-long services that offered transportation to pick people up in the morning and bring them home at the end of the day, that provided meaningful interaction with their peers, provided inclusion, and the providers used the 14C certificate to provide a paycheck for work that folks were doing when they're in the center, and that frankly, regardless of the amount of the check, was icing on the cake for the families and the individuals themselves.

So Minnesota was well intentioned certainly in building this system, but what happened over the years is that we developed a heavy reliance, if you will, on those facility-based employment options.

And so now Minnesota, thanks to WIOA and section 511 and the heavy lifting that the public VR program is doing, is we're calling upon the entire disability employment system to make some dramatic changes.

And so we know what those drivers are for the change. 2009 in the Obama Administration, there was a directive for the Department of Justice to step up its enforcement of the Olmstead decision. I remember it was 2012, I think in this very room, over on that side of the wall, I was having a conversation with the late Stephanie Parish Taylor, from Oregon. She was telling me that Oregon VR had just been named in a class action lawsuit for unfairly segregating individuals in employment services in sheltered workshops and not doing more to provide employment services in the community.

We were stand right over there and I remember stepping back and thinking to myself, "There but for the grace of God go I."

Now, we were not named in a class action lawsuit but the year before Minnesota settled on a class action lawsuit filed against the department of human services for violation of the ADA for segregated services for residential services as well as unlawful use of restraints.

So in that particular lawsuit, the employment services wasn't called out. But one of the terms of the settlement for that lawsuit was that Minnesota needed to develop an Olmstead plan. Because Minnesota at that point in time had not developed an Olmstead plan. Minnesota with all due respect to fellow Minnesotans here, we were a bit arrogant. We thought we were already moving in that direction and didn't need an Olmstead plan to inform the changes that needed to be made.

So the class action lawsuit that one of the settlements was that Minnesota will develop an Olmstead plan. So governor Dayton mandated of course based on the directive from the federal court that an Olmstead sub-cabinet be convened and a plan be written.

So the writing for that began in earnest in 2013, and the sub-cabinet was appointed with commissioner heads and it had D, the Department of Labor, it had Department of Education, it had Department of Human Services, it had Department of Correction, Department of Transportation, Housing, several other departments.

And Minnesota, wisely or not, took the direction of developing a very comprehensive Olmstead plan. And in that Olmstead plan, as you see in the slide here, there's a link to the Olmstead plan that you'll see.

There is a chapter in there to voted specifically to employment services.

And the vocational rehabilitation program along with state services for the blind is held accountable for the work plan in that Olmstead plan to achieve a certain increase in employment outcomes each year that the plan is in place.

So not only are we being reviewed and monitored by our federal funder but also by the federal court, Judge Donovan Frank.

As there was a lot of heavy lifting in writing that Olmstead plan, and prior to the final approval of the plan, the cabinet approved Minnesota's employment-first policy. I've provided the link for that as well.

And that explicitly states the direction that Minnesota must take in terms of its transformation of the employment services. So I would recommend that you take a look at those links and read the employment-first policy. It's consistent with how we understand in VR the employment-first movement across the country.

So let me, as we tried to educate people about this Olmstead plan, we needed to understand there were major drivers behind it much more than a lawsuit, and it really goes back to the Americans with Disabilities Act. So this is a slide that we used, and you see listed kind of in the middle of the slide Minnesota department of employment and economic development, Department of Education, department of human services, and to the right of that you see this prism. And there are three lines of different colored light that go through that prism and then are fractured, if you will, and the direction of those lights comes together all pointing to competitive integrated employment.

So this is how we're framing up the system transformation, that the laws articulated in the Americans with Disabilities Act compels all of the state agencies that are involved in disability employment services to work together to transform the system. And so what you see on this slide to the very left, you see parallel to the state agency, you see the seal for the Department of Labor, the seal for the Department of Education, both at the federal level, and the Department of Health and Human Services.

So we knew this change was happening, and so when the draft regulations came out, we, as I say here on the slide, we tightened our seat belt and we started to get ready for the preparation of section 5 implementation.

So we started with some outreach to the Department of Education. I remember vividly in the fall of 2015 meeting with all of the special ed directors before the school year kicked in and said, heads up, this is section 511 and the way that we are going to be serving transition age youth will be changing dramatically. We also talked about preemployment transition services but that's another presentation.

And we also talked with a special ed directors about take a look at the contracts that you have with providers, and if they have explicit in there subminimum wage employment, that's going to be a problem going forward.

So we began that conversation with the schools. We began the conversation with the providers. But even more importantly, we began our internal conversation to say, okay, we're going to see a different population coming to vocational rehabilitation so what do we need to do differently.

And as I say in the slide, what we need to do is we needed to think about how we were going to we route VR services. What does VR need to do differently. How do we better leverage the county services and the systems. Because in Minnesota, and maybe we're unique in this way, the waiver system in Minnesota is so incredibly complex that I can't begin to explain it. And to think that we would need our counselors at the ground level at every field office to understand the nuances of those waivers so they could figure out how to sequence the funds, we just weren't there.

So we figured, we're going to have to figure out how that works.

And we also knew we would have to quickly build capacity around customized employment.

So rather than try to make all those changes happen statewide, this is when I picked up the phone and called Steve Ditschler and I said," Steve, would you be willing to do this learning lab?" I got the idea from the Ohio VR program on a monthly call. They were talking about their employment statewide first initiative. They were leveraging significant funds from their DD agency to be able to embed counselors in the sheltered workshops. VR counselors. To begin moving those individuals working at subminimum wage in a different direction.

And so I grabbed that idea, and talked to Susan Pew and asked if we could steal the idea.

Talking to Steve, I said, would you be willing to serve as our learning lab, if I embed a couple of VR counselors at ProAct, can we work together to figure out how this is done?

So we got started with that. We rolled out the way to work project in September, and you know, we were learning some things pretty quickly, and both Abbie and Margie will talk about those detailed learnings.

And so we were working that, working on that, and then when the final regulations came out, we were feeling pretty good. We said, okay, I think we've got this. And particularly when in reading the final NPRM, and I had to kind of quote this, because when I remember reading this, I thought, oh, thank God, we will be able to make this transition without, you know, crashing. The language was: "There's no mandate in section 511 for the designated state units to seek out or solicit these individuals. To impose such a requirement in these final regulations would be extremely burdensome on the designated state units because of the thousands of entities holding special wage certificates under 14C." When I first read that, I thought thank you, RSA.

"Furthermore, there's no statutory mandate for entities holding 14C certificates to refer to the DSU. Employees or individuals with disabilities seeking to enter subminimum wage employment."

So I thought, okay, we will have the ability to transition into this in a gradual way. Not that we want to be complacent, not that we want to sit back and just take our time, but it's not going to be extremely intense.

So July 22, 2016, came and passed. That's when, again, section 511 went into effect. Relatively quiet day.

Things changed dramatically on July 27 when the Department of Labor wage and hour division issued their guidance to 14C certificate holders. That's when the careening around the corner began in earnest. Holy smokes.

So this is what happened in Minnesota. What you see on the slide here is a screen shot of a front page article in the StarTribune that appeared on August 18, 2016. So the regulations had not yet been in effect even a month. And so the title of the article: "State Scrambles to Take Action on Low Pay for Disabled Workers."

Some of the quotes from the article, I'll tell ya, when I read this article, I didn't want to leave my house. It said, "Minnesota's workforce agency is unprepared to enforce the new rules. While President Obama signed the law eliminating subminimum wage two years ago, D has yet to notify sheltered workshops how they are expected to comply with the new rules and the process for enforcing them." David Hoff out of Massachusetts was quoted as saying, "It's a staggering volume of individuals who need to be assessed. Minnesota is not the only state caught flat footed."

So what happened is, as we began to in earnest implement our requirements, to reach out to the providers and say, you know, we have this process, this protocol for the career counseling and information and referral, that we, you know, can make available to your workers, the response was intense. Providers were up in arms. Families were up in arms. County case managers were up in arms. They didn't like this at all.

And so we swallowed. We swallowed deeply. We took our breath. We got on the phone with RSA. I remember a spirited conversation with Carol Dobak and Suzanne Mitchell. Thank you for your tolerance in that conversation.

And so in spite of the resistance and the pressure, we forged ahead. So nine months down the road, we are we forging this. We have partnered with the centers for independent living. There are eight in the state of Minnesota, and we have executed contracts with them to serve as our designee. I frankly think that they are so very well suited to do that work.

The contracts, we're using program income to fund them. And total just a bit in excess of a million dollars to perform that work on our behalf.

So finally what I want to say is, so we're moving forward. What we're seeing now is roughly about 20% of the people that are participating in the career counseling and information referral are expressing an interest in pursuing competitive, integrated employment. And so with this population, people coming to VR, the lessons that we have learned and the things that we're continuing to learn in the way to work project, become so critically important for us. And so this is why I reached out to Steve and Rita and CSAVR and said, I think I have something that is really important for our fellow directors to hear, to understand that it's not just these other systems that have to change, but VR has to change how we do our work.

And so that's why at this point I'm going to turn it over to Abbie Wells-Herzog and Margie to talk about the detail on the ground, what we're needing to do differently in VR, to serve those individuals who are coming into the program as a result of the 511.

Abbie?

ABBIE WELLS-HERZOG: Good morning. Can you hear me okay?

All right. So as Kim mentioned, we thought the project in Ohio was a great idea, and she had talked to Steve at ProAct about the possibility of doing this project with ProAct.

To figure out who the other partners would be, I'll say that we kind of looked at who was already on board with where we wanted to go. We chose Dakota County as the county to work with because they were already progressing towards a lot of competitive, integrated employment in the community. They worked very closely with ProAct and they really were pushing the employment-first initiative.

And we had a pretty good relationship with them.

Additionally, we needed D, our department of human services, at the table because they work closely with the counties and we needed to be able to work with them to blend and braid the funding in order to make our pilot, the way to work pilot, work.

A couple of the things that initially early on, a bunch of us from the different agencies went to Ohio and spent a couple days to see how they did it in Ohio. And that really gave us some good ideas about what would work in Minnesota and what wouldn't work in Minnesota.

We were doing this on a shoestring. We didn't have lots of money behind it. So we were trying to do something very cost effective.

When we came back, we had to take the best of what we had learned and kind of shrink it down into something that would work in Dakota County.

As we moved in these new directions with our pilot, there are some key elements that looking back -- I was reading through my notes as I was kind of developing these key points, and I've kept a journal through our whole process, and these were the key points that made it work. Some we borrowed from Ohio. Some we learned from Ohio because they didn't have that element and it seemed that that might be a good thing to put in place.

First of all, we embedded two of our counselors at ProAct. They are there five days a week all day. And that was essential in order to create this learning lab, as you might say.

But it also was essential because they are there with the folks, the job seekers, that have expressed an interest in working in the community and no longer working in center work or in an enclave. So they are right there. They can drop by and get to know the job seekers at a much deeper level, and they become much more familiar with maybe their skills and their personalities and things like that.

The other thing is, the voc rehab counselors and the job developers at ProAct really formed a very strong team. We had weekly staffings, and people from all the agencies, all the partners, came to the table and those were fantastic. We could solve a lot of problems up front and everybody was there and we could all be on the same page without a lot of emails flying around.

The other thing we did differently was we added a county liaison. I think they had some county liaisons in Ohio, but I think in Dakota County, we chose to have a county liaison at the table. Our liaison's name is Meghan, and she is a strong advocate of employment first. And she was indispensable. She helped us understand waivers, she would go back and talk to the county case managers. If ProAct was calling the county and saying, hey, we need some funding to do this and the county case manager didn't understand, then what would happen is Meghan would get in there and help them understand.

So that was one of the key people is having that liaison between ProAct and VR and the county, because that waiver stuff is so complicated.

I think the other thing we changed was the questions we were asking. Previously we would ask can this person work in the community. Now we're asking the question, what supports does this person need to work in the community.

This is a huge shift, and it's spreading. I'm happy to say it's spreading into other parts of Minnesota. But it's a different question. And it's a mind shift that we're hoping will continue to spread throughout the state of Minnesota for our counselors and our staff.

Additionally, we changed how we did services and the way they are delivered. And Margie will get into more details with that, but some of the things that we really focused on was focusing more on the person's skills and interests, and then going deeper in the VR assessment. We needed to know more about the person up front because we wouldn't have enough information about the person because they're not going to be -- a lot of the folks we're working with have some pretty significant barriers and they're kind of complicated.

So we had to do things in a different way. And we're doing more things more experiential and helping people find their skills in a more experiential way than sending them off to have a voc eval and then we get a couple-page report and no they can't work. We're doing it a really different way.

The team approach, having people at the table, that's important to that person. We needed to have the parents involved and their county case manager, but we also needed their case managers at ProAct and we needed VR. And maybe other people who were important to them and knew them. We wanted those people at the table for planning too.

And then benefit planning was essential. That was one of the key things we found, because -- and we were lucky to have access to that in Minnesota. And we have access to having people come in and do some benefit planning with every single person in the pilot.

So they know if I choose to go to work and all of them have already said they want to work, then they know what's going to happen and that has really decreased a lot of fears for the individuals but then their families too. Because a lot of parents and family members kind of get -- that benefit thing really stands in the way a lot.

And then I think our other thing that was very important was changing our expectations. I think that was one of the hardest things when we were talking to families about people going to work. A lot of these parents and family members have never even thought of this person working, and it's kind of a surprise that we're talking to them about their loved one, that they say they want to work, I think we can do this. And that's a huge, broad -- that's something that we're going to continue to face and have to figure out, but I'm not quite ready to take that on as a system yet, but looking at the expectations from an early age. And that's why we need to have our partners at DHS and MDE and everybody on the same playing field because those expectations need to develop early.

And then finally I think bringing in the use of person-centered thinking and planning. We had a lot of training from management down on adopting the person-centered thinking models and then the tools we use. We kind of decided that anybody who touched the project had to know these philosophies and had to kind of embrace them. So we were all talking the same language and we all believed the same things.

And Margie will talk a little more about that too.

And finally, we're developing competency in customized employment. Kim was kind enough and had enough vision to hire on a customized employment specialist, who worked initially almost -- spent all his time with the way to work project. And worked with the job developers at ProAct to help them see and help them develop additional tools and skills so they know how to work with both the employer and with the job seeker, because that's essential. They're both our customers.

And once that happened and we brought our customized employment specialist, Josh Dean, in, that was all the difference. We hadn't had very many placements up to that point, and once he was on board, we sky rocketed and that was a key learning too.

So those are the big things that I think we learned. To take some of those pieces, I will say that we are doing statewide training in person-centered thinking and planning for all VR staff later this year, because we've learned that that really works.

And then we also are taking the customized employment philosophy out statewide too, and so Josh is going to be traveling a lot.

And thank you. I appreciate you.

And next we'll talk to Margie, and she'll talk more about the devil is in the details, because that is -- she's on the ground and working with folks.

MARGIE WEBB: Good morning. So when Abbie approached me and said I want you to work on this project, I had no idea what I was getting myself into. I had been working in transition and worked with VR for about ten years. So primarily working with youth and students, either coming out of high school or in transition with vocational planning.

So as we started this project and we started about a year and a half ago, we had no idea, you know, how many people in ProAct or in the provider we were working with would actually say, yes, I want to work. And so anyone who came forward and said, yes, I would like to work or at least explore work options, we said, okay, you'll be eligible for the work program.

That was a very different step for VR because anyone who said that was eligible for VR and we proceeded in that fashion.

We did find that many of the individuals who came forward and said they want to work, all different ages, different places in life. Some had been at the facility, we had somebody over 40 years. And some maybe only a year. Maybe recently came there out of transition program.

In the year and a half that we've been there, we've had 124 people step forward and say, yes, I want to explore work. So we got more people than we could start with so we had to develop a system to say how could we work through the individuals.

And in starting the project, we went to person-centered thinking training and then person-centered planning. And as I thought about that, I thought, well of course I'm person centered. I listen to people and I take what they say to me and try to help them through the career navigation process and end up in good jobs. So I thought, well what does that mean?

But I really had to participate in the training, and it was really important to what we were doing then and what we evolved to now.

It was a lot more than that. It was really getting to know people on a deeper level and not just -- I describe it as understanding the why behind what a person wants. And so instead of -- I typically met with people in a school or in my office when I was a transition counselor, we sat across the table, maybe a parent, maybe a couple other people in the room, and we said, what would you like to do, what are your goals, and how can we help you accomplish them.

In this system, it's a much bigger team. A lot of times we have case managers at the table, the provider, there might be PCAs, group residential provider other people that are involved with the individual.

But we knew early on we needed everybody at the table and ask them, when is this person at their best. Because I needed to know people on another level, not just to say what you want.

We discovered early on that people weren't able to communicate as well. Some are. Some aren't. Some people can come to the table and say, this is what I would like to do, this is what I would like to see happen.

There were a lot of communication barriers and deficits. So when we asked people, a lot of people would shrug or say, I really don't know. A few people came to the table and said "No one has ever asked me that before." And I thought, wow, we're really starting in a different place.

So I had to figure out how to get to know them better.

We used some of the tools in person-centered planning. I use a lot of important to, important for. That tool became important. Important to is who is important to the person, what does that look like. And important for really addressed more of the safety needs or who might be part of their team.

So as we started, we got these big teams together and oftentimes everybody couldn't come to the table. So I find myself going out to talk to people in other places or following up with phone calls or connecting with more people in different ways to say, what do you know about this person, what are their strengths, where do you see them at their best and how can we gather some of those skills and put that into a work environment.

So it was really getting to know people. I have what I call my bag of tricks in the office. And so in that little bag, I have different things. It really depends what the person says to me, but I've done a lot of engagement with people and I might play a game with them, we use cards if they say that's something they're interested in and if they didn't, we look at something else.

But I start off saying, "what are you interested in?" And I do that with them, whatever that is. Some people belong to church groups or other social networks. And so I might find myself going out in the community in different places. I do home visits if people are living in a group home type setting. What does their room look like. Talk to parents and the people who know them, to say, what does their day look like and when are they at their best.

We know when people are at their best, they need less support, they're engaged, and they do better and they learn and they flourish in those situations.

So my role as a counselor has really changed. I'm doing a lot more things, I'm doing it differently. I might work some different hours. I'm not typically working 8:00-4:00 in an office. I may be doing activities in an evening visiting people when it works for them.

The other piece of being person centered is I ask individuals, where do you want to meet? Not everybody wants to meet in an office. Sometimes that doesn't feel comfortable.

The other piece that I've really learned in implementing some of these things is when you're engaged with a person and doing an activity, whether we're walking somewhere or they're taking a class at their facility and I'm part of the class, I ask them to show me how to do it. I learn a lot about their ability to explain things, their ability to organize and set up things, and what really excites them. So we're taking that information and saying, how can we put that into an employment plan? What are those things question use to move this person forward?

As we look at different kinds of employment and jobs, a lot of those skill sets or tasks that people can do can be used in many different ways. So then we're just implementing the customized employment saying where can we find those skill sets?

In terms of putting together information and approaching employers, we're using customize the employment. So again, I can say with confidence, I've seen this person do this. They can set things up, they can explain how to do things, they have good customer service or they can speak well. Really depending on their level and say where can that fit in the business.

And part of putting all that together is being put in our VRS needs assessment and then in planning.

And again, I'm using team members. I don't have to do all the work myself, but again, getting everyone to the table and saying, what can you help.

We are finding that some residences, depending how they're set up and licensed, can help with transportation, which is a huge barrier in our area. Probably in a lot of places. Who can help with that? How can we become creative to find ways to get people to work?

We've had residential staff step forward and say, hey, we can provide some supports. We use some PCAs to help with training on the job or just helping with figuring that out piece of how are we going to make this work and putting all those pieces together.

Our physical presence. We're embedded or I'm at the facility now. There all the time. That helps me connect with people, see people. Some people I see daily. Some every other day. Some people weekly. Some people not as much. I really tailor it to the person but it's an inviting environment for people to stop in and say, hey Margie, I did this today, I had a good day, I had a bad day.

I'm taking all that information and putting it together to say, here's the kind of work environment that might work for you.

And as I said, people communicate in so many different ways. Verbal communication is just a small piece of that. So I can visit people there.

And we've talked about this as a group, would I need to be there all the time or it's not realistic to have voc rehab counselors in every facility but I feel I could do that with some regular planned visits to a facility. So these are some of the ways my role has changed as a voc rehab counselor and things I'm doing different.

As I said, we're using customized employment so that's putting that information together. We're really breaking things down into specific tasks. Very specific tasks. What can you do.

And then our job developers are going out and talking to employers, saying, you know, we have someone who has this task set. What are your unmet business needs and how can we help fill them. So very different model of placement. It's very customized to each individual. Our résumés all look different. We approach different employers based on each person. We're really providing services around that individual and what makes sense for them instead of putting people to systems and procedures that we've set up as an agency.

So very different.

The other piece of my role that's very different is I am a head coordinator. Like I said, I don't have to fulfill all the tasks but I have to bring everybody together. Our county that we're working on the project in, Dakota, used to have case managers very regular. They worked with families and individuals for long periods of time and knew the people well.

In today's world, we're contracting out case managers in our county so there's a high turnover in case managers. I've had some people that have had 3-4 case managers since the time I've been working with them that may be about a year. So there's a huge turnover. The case managers don't know people as well.

So I'm having to learn, what are those waiver funding systems, and I'm having to put together who can do what to bring together those pieces of funding. Who can pay for what, to maximize our resources. Obviously voc rehab can't pay for everything. Waivers, what can they cover. I'm learning a lot about that and how we can put all those pieces together with residential, with parents, with family members, with people that know those individuals.

So with that being said, I want to talk about success story. The first one I'm going to talk about here, actually we'll just talk about Patrick. Because Patrick came to me early on, one of our first way to work referrals. And he came in and he lived in a very isolated area, said, I want to work. He had a disability on the autism spectrum. He had average to above average IQ. And had some pretty good people skills. Had some hearing loss in one ear.

And growing up he had a lot of things happen to him in his life and family. His parents had passed away. Really no longer had supports in terms of family. But he did have some pretty good residential supports. He was living in an area without public transportation. He had residential supports initially right in his apartment. Those supports moved to a new apartment. He didn't have the financial resources to move. So he had a roommate, was trying to work as much as he could to pay for all of his costs, but wasn't able to make ends meet. He was cutting his own hair because he didn't have enough money for haircuts. We suggested using food shelf and resource. He said, those are for people who are worse off than me. So he didn't want to take advantage.

So some of the first things we did in our teaming of that was to say, how can we help him get to an area where there's public transportation. He wants to work. He can take the bus. Actually, he could probably learn to drive but he said why would I do that, I would never have the money to have a car or be able to drive.

So we said, how can we help him move.

So in the process of teaming, we were able to get just into a lease. His case manager got him some emergency assistance funding to help with the cost of the move. He moved to an area that had a lot of employment opportunities. We were able to find him a job. We asked him what he really was passionate about. He liked helping people and working with people. He went to work at a local retailer doing stocking and customer service on the floor. He was very good at organizing things. He had a great memory. He knew where things went. He could tell people where anything in that store was.

So he went to work. It was about a mile from his home. That's one of the other pieces we look for. Where is work closest. Make it easiest to get to.

He's now using the public bus to get there. He also happens to live about a mile from his girlfriend, so he actually can see her now because he didn't have access to her outside of his facility. He didn't have access even to get together with her. Now they can go out and he has enough money to go out to eat, go to a movie. He's within just a couple blocks walking distance of restaurants, a major area to get to stores and things he wants to do.

We recently talked to his employer who said, I would like ten more people like that. He's very conscientious. He's made suggestions to the company about products they could add to the shelfs and the company has gone forward with doing that.

So for someone like him, he will tell you, this process changed my life. Someone listened to me, somebody addressed all the needs I had, not just employment, but how were we going to work on all those other pieces.

So with that, to summarize things, my role has changed tremendously, and I'm going to turn it over to Steve, our provider.

STEVE DITSCHLER: I'm going to stand up. I've been sitting long enough.

I'll do a quick story. When I got that call, the county we operate in, people from DHS and let them see the warts and all on a daily basis, I didn't take ten seconds to think, yeah, this is a good idea.

We had the first time we looked at a list of people that indicated a preference to go to work, when they had been in nonwork programs or they were underemployed with us unfortunately, I have to say that. We started off the list and this kind of turned it around for me. The first person on the list was a female, already a senior citizen, that needed a two-person lift, transfer lift, to help toilet.

So I said, wouldn't there be some better candidates to start with that would be more likely to achieve success to start off? And I think Abbie right away cut me off and said, you are not thinking right for this project. Everybody is assumed to be able to benefit and we will wrap it around.

I think that turned me around right off the bat.

But we're operating in a different time now. We started working with birth to 4-year-olds in Minnesota, with staff going into the hospitals and with the recommendation of the doctors to help families adjust to having a new son or daughter with a disability. So it is a system, a provider system, that is steeped with deep connections to the individuals served in the families. And as Kim said, unfortunately, that maybe put us behind but we're ready to rapidly catch up.

But society has changed too. There was a time when you might look twice if you saw somebody with a disability in a store helping you or doing a position. Not anymore. It is second nature. We expect everybody to work. It is nothing to be served by or see or employ or interact with somebody with a disability. That's a very positive change for society and it is making our work much easier.

In Minnesota we're in a time of transformation. We do have some deep rooted practices that are kind of congregate in nature and do involve the 14C certificate. There is no provider that I can think of that would, and not anybody who works in the system in Minnesota, that would not fully acknowledge that competitive integrated employment with no natural supports is the best outcome for an individual, period.

So that said, how do we make that happen in Minnesota when it hasn't happened in the past?

One of the tugs we have is the families. And sometimes the guardians and families are at odds with the individuals we're serving. I know when I meet with families, they're scared to death that this system they've known for decades could collapse, be taken away, the resources available to help their adult sons and daughters achieve their dreams might be cut out from under them.

And we know where it's going. We've known that at least since 1984 and working our way there.

So that's become more of a juggling act, it's become more intensive in recent years.

Of course engaging businesses is critical to success. We can train, we can work with them, we can do person-centered planning and customized employment. We have to have employers that are willing to take somebody on and hire them. And we do that by preparing somebody and get them to do the jobs, the essential functions of the job. I find when you do that and you're honest and open and work with the employer, they're more than happy to hire, especially right now. We have the luxury in Minnesota of having low unemployment rate. So it's great for placing people. Low little hard on attracting and retaining staff but I'd rather deal with that and get our people out there working.

So that's a piece of what gets in the way and slows us down is a little bit of the workforce shortage for direct service staff. Not the best paying field. Not comparable benefits to state and government entities.

A bit of a challenge now. Most of our revenues earned through program service fees. But it works out. And we get it to work.

At the same time, if we, for those running the programs, we have a responsibility to be fiscally solvent. You don't serve anybody if you go bankrupt. We're in a state that wants to happen and counties that want to have that happen.

So the lessons we learned from the way to work project is certainly that collaboration and partnerships are critical. However you want to call those, that is critical. Having the county be able to put a little pressure on some of the residential programs that didn't necessarily want to do transportation help, having to reach outside providers community, work with residential side to get somebody moved closer to the job and in more of independent placement helped. The whole idea of getting people to work together even when they're friendly competitors of providers for achieving these outcomes is important. Being able to blend and braid some of the resources is important. You know, Medicare DHS side doesn't always work well with the VRS side. For this to work, especially with new potential referrals that maybe VR hasn't seen before, we're talking much more significant disabilities than we've seen come through the traditional VRS system, at least in Minnesota, it's going to take some of those resources that right now are coming from a different source. So that will need to change also.

And of course understanding the source. Benefits. That is critical. We've all had to manage people because they had to cut their hours or didn't want to make too much money or lose their benefits. It is too traumatic, too hard to get back, so that's another thing where that benefit analysis is critical.

One of the things that helped this project go is we guaranteed a safety net for folks. If it didn't work, if it doesn't work, you don't lose you what have. I don't know that we've guaranteed that into the future if things don't work out long run, but for now we certainly have done that.

For our service delivery staff as a provider, we have to change their skill set. If you've been used to serving, providing support services to put somebody in a more congregate setting, not doing job coaching, not having to worry about customer relations and their customers and being sensitive to all of that, it takes a little more savvy, but they're fully embracing it.

I find that I know at times the provider community can be kind of the villain, so to speak, but these are for the most part folks that work directly, they have boots on the ground, they have to look the individual in the eye every day, families at team meetings, they want the best outcomes for the folks they serve, just as your placement counselors and case managers do. They're not interested in being part of a system that's a dinosaur and changing. They want to maximize the outcomes for the people we serve.

So that changing culture that I started off with me personally has happened with the person-centered planning and philosophy. It's in the Workforce Innovation and Opportunity Act referring to the customer. I think we probably all have said we individualize services over time. There's a difference. I think the different shift and others mentioned here is fitting the services around the individual to make them successful versus fitting them in to services that are there. Taking them out to a job because you have that relationship with the employer but that's not a good match for the person. Probably not going to be as successful and work out. So we don't want to do that.

And I think for one of the things in the project that I'm somewhat cautioned about because of the commitment to those we've already served is that unintended consequence that somehow it doesn't work out but because we tried, individuals could end up in the residential setting with no other services when they were used to getting the five-day a week service that they liked.

Now, so I think that's critical. And I know I want to leave time especially for Tamir, but I do want to say that Tamir is a good case where I have to stand up and humiliate myself just as Kim did a little bit with the department.

Tamir comes into our department through the human service side and gets into our program and gets into a job where he's timed based on physical dexterity in a subminimum wage situation at first, happening under a program I lead where I'm out trying to promote the value of hiring people at comparable wages and trying to get them on a career path that leads to family-sustaining wages and I have to look Tamir in the eye and he starts off working at $1 an hour in the system. So thank goodness we righted this ship and were able to get him through that and get him in a job above minimum wage and he's happy and on a path that hopefully leads to his own business where he can be successful. That's the way we have to view everybody that comes into our services, as providers.

I think when I look at a success story like that, because it's very moving and we were lucky enough to have about that 21 of these last calendar year, and I see the difference it makes not just for the person because that's the most moving, the story that compels us to act and makes us feel good, but then it touches the lives of their family. In Tamir's case, his mother, who is so dear to him. And his brothers and sisters and employers. He's out there pleasing the customer, his employer Best Buy, it makes it easier for the next person to go to a Best Buy or retail store. So as we grow the success and get to the point where I think it was Curt who said you kind of close the door on more sheltered options and people go through the school system and we get that alignment where we're working with education and human services and voc rehab and the provider community to get people kind of going right into that job where they can have a good life and support.

With that, I'm going to end and turn it over to Ron.

RON SZELAG: Good morning. Everybody hear me okay?

Like Steve, I run a retail store so I have to get up and move. I'll be very animated and quick, just as in a retail environment.

You know, Tamir came to me this past holiday season as a normal employee. We go through a rigorous interview structure, you know, we have a first interview, a phone interview, and then a live interview with one of my assistants and finally they come to me.

The unique questions I always ask, you know, he did very well in all interviews, and when he came to me, obviously we have a format we have to stick to. When we're done with that, my favorite question to ask is what do you do for fun?

And Tamir comes to me from a customer standpoint. What do you do for fun? To watch this gentleman light up and say, "I love to play video games!" And I'm a video game shop. All the time.

So he has passions that I don't want to take away from what he'll talk about, but he has passions later on beyond me, but I'm lucky enough to have him for however long I have him. And I will relish in that and embrace him in every step that he does.

ProAct has been an advocate from the aid standpoint and Tamir is at a point now where we don't need the aids in the store. We can have an employer-employee conversation from online training and trust me there's a plethora of online trainings. He is sufficient at it. All the way to a gold certification and he's one of out of 115 employees that I have, he is an elite group of 20 employees that can get to a gold level certification. So huge accomplishment for him.

And then watching him flourish in the store since he's been there has been fantastic. He doesn't bring his wheelchair in. He walks into the store with confidence and pride. With his uniform on, ready to go. Whether or not he gets stopped on the way into the store, whether or not he gets stopped on the way out of the store, he's 100% with the customer, has learned all formats of the store, can take a customer has where and speak to any product down to every accessory. He can down stock. He knows functionality. He can solve for KTVs, which is fantastic. You put him on the Sony pad and he's in the spotlight.

[Laughter]

And he gets to sell cool stuff. The customers interact very well with him and I get a lot of kudos and I don't need that, but I do get a lot of kudos for taking on whatever that is. It's an employee to me, so whatever it is, right?

Again, his integration has been fantastic. His communications skills I believe have grown tremendously in the short amount of time he's been there. His confidence level is there. You know, and he works 18-20 hours with me.

I don't want to take away from him and I want him to be able to tell his story. But it's been a very good journey. And I welcome everything that we all are here for.

TAMIR TSOGBAATAR: Hi. Good morning.

>> Good morning.

TAMIR TSOGBAATAR: I was born with cerebral palsy. My mom had me in a hospital with no equipment or doctors who knew what to do with me. There was no one to help us. There was no safe places, no schools or services for me. No one who knew how to help me. No one except my mom. She told me, “Tamir, you have to walk.” So I did.

I came to the United States when I was 11 years old in 2002, and I started all over again. I started going to school and studied English. It took me two years to learn English. I learned English by memorizing two words each day and by talking to my classmates.

In my high school graduation, I walked across the stage and received my diploma in 2010.

After high school, I went into a transition program and took some college courses in video game design.

Then I started working at ProAct for disabled people. They teach them how to work.

I was making 37 cents an hour. When I was working, I got invited into a way to work program, and I met my job coach, who helped me and found me a job at Apple Valley Best Buy where I am a stocker.

I love my job. It is my dream job. Now I make $11 per hour. Working at Best Buy has changed my life in many ways. Now I am strong, I am smart, and I am independent.

I want to start my own business, helping people with disabilities, with technology to help them. I think helping people is a really important thing to do.

Now I am strong, I am smart, I am independent. Someday I will help disabled people by sending them adaptive equipment.

Thank you.

[Applause]

KIM PECK: In those moments where this work is really discouraging, I just think of Tamir and I think of Ron and I think of Abbie and Margie who are on the ground making this work. And that gives all of us I think the spirit and the energy to carry forward.

So let me just, a few things in terms of promising signs that are happening in Minnesota.

As I said before, the data that we're getting from the centers for independent living is that roughly about 21% of the people that are participating in the career counseling and information and referral are expressing a desire to pursue competitive, integrated employment.

What we're working on now is developing some pilots where the county case managers at that point in time where the individual says to the IL staff, I'm interested, the county case manager takes it from there and they kind of facilitate the conversation and the teamwork needed as was described by both Abbie and Margie to lead to a different outcome.

What we're also seeing is that there is significant changes in the transition caseload for our staff. There are a significant number of students who are transitioning or their plan was to transition to provider services, so our transition counselors this year said to the special ed teachers, we want to identify those students that are set to graduate in 17 and who are tracking to subminimum wage employment. Those are the people that we're going to work with.

So as you see on the slide, you see significant change just in the last year. I took a look at the numbers of transition students in planned development with intellectual and developmental disabilities. In fiscal year 16 between October 1 and March 30 it was 16.2%. Just this year that exact same time frame it's now up to 25.8%.

That's good news and at the same time presents challenges because it's not uncommon for those students coming to VR to be nonverbal, to have significant behavioral challenges and need significant assistance with ADLs. So that's why it's so critically important that the information and the lessons that we have learned in way to work that we're able to apply those.

Also that cross agency work is so critically important. You know, the good news from my perspective is that the Department of Human Services has in the legislative session this year a request to the state legislature to be able to use their waiver funds differently, that would allow them to support services that lead to a competitive, integrate the employment outcome. If that can happen, that will be a huge relief, frankly, for vocational rehabilitation services because at this point in time, frankly we're the only game in town.

There are some flashing yellow lights, I have to say, in that in the last 2-3 years, particularly with the implementation of Minnesota's Olmstead plan, and certainly with WIOA, we now see a significant jump in the number of people that are applying to VR that fall in category 1. Initially we thought it might just be scope creep, but we really have looked at the data carefully and see that now we 4% of the people applying for services fall into category 1. That trend typically was between 65-70%, meaning that pressure relief valve that exists with the order of selection is less effective because now 94% of the people are coming in.

So we do have a budget request in the Governor's budget for an increase in our state appropriation. We're fortunate that we are fully matched. But we need additional resources, particularly with the diversion of the 15% for people with disabilities and the million plus dollars that we're investing in the 511 work.

We're also nervous about the pace of the system transformation. Both Abbie and Margie and Steve talked about we're working as fast as we can with the help of WINTAC and other technical assistance centers to scale up our staff around person-centered planning, but I wish I could snap my fingers and make that happen but it never happens that quickly.

So what happens, there's a lag. The referrals are coming in but our counselors don't have the resources that they can immediately refer to that are scaled up in the way that we need.

So that leads to frustration and discouragement on the part of families to say, okay, you're going to do things differently but it doesn't look like you're ready.

Those are some of the flashing yellow lights. But in spite of that, we have our seat belts fastened, we have our hands on the wheel, and I think this ride will continue to be a nail biting ride, but you know, all you need to do is to think about and reflect on the success that Tamir described, the other stories that we're hearing, to see that this is such critically important work. And that we must view ourselves as privileged to be able to have the opportunity to participate.

Minnesota VR, the general agency, is certainly committed to working collaboratively with the larger disability employment services community. The change that needs to happen cannot just happen within one program. It has to be across the disability service system, across all funding streams and programs. So that's why it's so essential to make sure that those memorandums of understanding that we're developing with Department of Education and the Health and Human Services agencies are not just pieces of paper but they're robust agreements to work together in a way that we never have before.

You know, we are certainly committed to paying attention to seeing those numbers drop. Minnesota doesn't want to continue to lead the country in the number of people working in subminimum wage jobs, but rest assured that we're going to pay attention to more than just is the number dropping. We need to make sure that the number of people that are moving into competitive integrated employment is increasing. Because if the number is dropping only to have people with significant disabilities sitting at home, we have not accomplished anything. And so I look forward to the opportunity to report back in a year, to talk about the progress we've made.

At this point, I think we're almost out of time and I'm going to say thank you and then open it up to any questions you may have.

[Applause]

>> Thank you very much for your presentation. I'm impressed with the progress you made and the success stories.

I have a three-part question. The first is, as you engage employers, what is their overall receptivity? And to the extent that they're not receptive, what are the biggest challenges that you face?

And then the third part of the question is, do employers ever get involved in the customized employment design phase?

KIM PECK: I'm hoping I can turn that over to Margie and Abbie. This is why we really need to hear from the experts and not just the administrators.

MARGIE WEBB: We're finding as we present people, we have to present people very differently to employers. So it's social relationships or relationships that are developed previously. We're often not going out and interviewing for a prescribed opening or job description. We're out there communicating with employers first to say, what are your needs, what do you have that's not being done, and do we have someone that can do the task that you're looking for or fill some of those tasks.

So it's a very different process going about job placement. We find some employers very open to working with us. Some are not. It's been pretty receptive. It's just finding an employer that has needs and then, like I said, finding that person that has the skills to fit it.

Doesn't work for everyone, but like I said, we're going out there talking to employers first to do I guess some of that there screening to say, are you willing to combine this set of tasks and make it work for your business. We look at people's value as we break down tasks that people can do, and we say, what value can you bring to a business. And so we're presenting people in that fashion.

We've found that traditional applications, just throwing a lot of applications out in a traditional interview process was not effective because people weren't able to communicate well. That's where we went with different styles of résumés. But we're having the job developers go out and establish relationships and connect with employers first, and then talk about the program and what some of the options are, and as employers are interested, we're bringing people in. So kind of flip that process around tremendously within customized employment.

Did that answer all your questions?

STEVE DITSCHLER: And I'll just add, I know we're more than willing to customize training. A couple examples of that one would be Walgreens, which has the training for their specific job in their stores, and individuals with disabilities that go through that have a high percentage of hire.

We did that with Pepsi at a distribution center and actually designed the training to actually the store lay out. We actually off in their warehouse distribution center, but that got too chaotic so we replicated, for example, that in a space and did the training and they could come out and interview and watch the people perform the skills. We were setting up for that with Amazon but they decided to start that in California instead.

But I think that's a great idea. When you're delivering training specific to needs of that employer, it really helps. And you combine that with customized training and the job matching, the likelihood of getting the job and keeping the job is much higher.

RON SZELAG: And I would even say from the employer standpoint, you know, we have specific trainings and specific guidelines and specific ways of learning each job within the store. I would say there's a fit, if not a fit for everyone within the environment, either behind the scenes or customer facing. You know, there's areas of opportunity within the store in all angles. And each individual plays a certain role and as they progress, then they learn the next set of training. And then maybe at that point they start noncustomer facing like Tamir did and then switch over. I would say in my environment, there's specific trainings in depth. And I talked about the path. You know, gold, silver, bronze path. Those are strategic paths that make not only the employee more valuable but you're more valuable to the business at that point.

STEVE DITSCHLER: I think there's an expectation of employers that don't need the customized training is that somebody has the soft skills or essential skills, then they'll often work them through their own training systems, but we should do a good job at getting somebody those essential soft skills and then the companies will often take it from there.

RUSS CUSACK: At this time, it's all good things have to come to an end, and this was an excellent panel. I've already written down that I'm going to invite them to come to North Dakota to give a presentation at our conference.

Please give them another round of applause.

[Applause]

CSAVR wishes everybody safe travels. May your airline not be delayed.

[Laughter]

And NCSAB will be starting at 1:30 I believe in this room and we welcome all of those members to that conference. We wish you a great conference. Thank you very much.

[Applause]