

# VRTAC-QM Plenty with Twenty - Transcript

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CAROL PANKOW: Well, greetings and welcome to Plenty With 20. This tool was developed in response to requests from state VR agencies to help them prepare new directors and other executive leaders hired from outside the VR system. This also has applications to other staff in the organization who come from outside of VR, which includes your financial people.

Little disclaimer, everybody's well used to this. This content was developed by the VRTAC for Quality Management, which is a project funded by the US Department of Education. The information contained herein does not necessarily reflect the position or the policy of the department, and no official endorsement should be inferred.

So today, you have me, Carol Pankow. I'm with the VRTAC-QM Fiscal team and was the proud person that helped to develop this back in the day. And so we've literally had this in place for about three years. And we do have it available to you in a number of formats.

So it's meant to be a resource you can use with a group. You can do it individually. You could take this and do one topic a week and spend a few minutes on it. Or maybe you want to massively whip through our 20 tips. But I'm going to click us over to the Plenty With 20 tool so you can see it on the website and you get a little sense of what we're trying to do.

All right, folks, I want to show you where this lives on the website. So our Plenty With 20 tool is set up like an accordion. And what I mean by that is we have all 20 tips listed. You can literally click on a tip. It will expand.

So you're going to get a little bit of information about that tip. There may be some important resource that goes along with it. And then there might be some homework for you.

The to-dos for you. Not all of them have it, so don't freak out. It's going to be OK. You take a look at your section, you do your things, you can contract this section and you can continue on and work through this, if you want, on our website. You can also, for those of you that like paper, because I'm a person that likes paper, you can download.

And the first one is downloading a detailed list of the 20 tips, the checklist, and the resource. That's virtually every single thing that is on this website in a presentation kind of format, a little publication. The second one is just the checklist and the resources.

So if you're like, eh, I read the thing, I just want to know what am I supposed to do, and the resources, you can go to that. So you have lots of options for how to utilize the tool. So as I said, you can click on

this link. You can go to our website, [vrtac-qm.org](http://vrtac-qm.org). And the easiest way to find this tool is just to go to our Resources tab. We have everything listed out in alphabetical order.

So let's dig in. Tip number one, understand your agency structure. A state may choose to have a combined VR program which serves all individuals with disabilities in the state or they may elect to establish a separate agency to serve the blind. And then they would have both a general agency and a blind agency. There are currently a total of 78 programs that cover all the states, the District of Columbia, the US territories and commonwealths, which include Puerto Rico, Guam, American Samoa, the US Virgin Islands, and the Northern Mariana Islands.

There are two excellent sources of subregulatory guidance that can help you learn more about this important topic. TAC 12-03 on the Organizational Structure and Non-Delegable Responsibilities of the Designated State Unit for the VR Program, and TAC 13-02, Reorganization of the DSA and the Designated State Unit for the VR Program. I highly suggest you bookmark both of these. They are going to come in handy in just a little bit, and also as you are in your career with the VR program.

Tip two, Understand the Federal Administration of the VR Program. This section is super helpful in giving you an understanding of how the federal oversight of the program occurs. The public VR program is funded by the US Department of Education and the oversight is provided by the Rehabilitation Services Administration. So first acronym, RSA. You're going to want to get used to those two. And it is located within the Office of Special Education and Rehabilitation Services, also known as OSERS. So, your second acronym.

There are two major divisions within RSA that house specific program units. You have the Training and Services Program Division. This group monitors discretionary grants and provides technical assistance. And the second division is the State Monitoring and Program Improvement Division. And this group administers the five formula grant programs authorized under the Rehab Act, ensures consistency with federal requirements, and helps states to implement programs designed to improve results for individuals with disabilities.

More importantly, you want to know who your state liaison is and your financial management specialist. And if you click those links, it will take you to those folks. And I really recommend reaching out so they get to meet you and you can meet them and start to establish that relationship. The other thing that happens is that the RSA team, they will review, they monitor state VR programs. And every year they publish a Federal Fiscal Year Monitoring and Technical Assistance Guide. This can be good homework for later to take a look at that Monitoring and Technical Assistance Guide and also review any monitoring and technical assistance reports that pertain to your agency. Getting that background on what they were looking at and maybe what were the things that were being fixed or even the things that are being changed right now is really important to know.

Tip three, be in the know. You can't lead effectively if you don't know what you're leading. It's really important to be part of all of the activities happening. And so you want to be able to sign-up for RSA email updates. Unfortunately, we're in a little lull right now. There was a new contract that was issued to the

Department of Education of which RSA participates in. And they are going through a little bit of a process to get this implemented, but as soon as it's up and rolling, you'll be able to sign up for your RSA email updates.

You also want to bookmark the RSA website at [rsa.ed.gov](http://rsa.ed.gov). Really important information out there, including this VR Program Reference Guide, which RSA developed for all those new directors and new leaders to programs. It gives you, in a really condensed version, everything that you need to know about the program.

Tip four, be intellectually curious. You want to know what is going on with this program. You want to identify those subject matter experts in your agency who maybe have been around for a while and you can ask them questions. You also want to get to the various technical assistance centers available to you and their purpose and also tap into your assigned RSA liaison. They really do desire an active relationship with you and with your state.

Also, I'm going to challenge you to keep reading and learning and growing in your leadership skills. That's just as important to keep up. And there are lots of great articles. We have blogs. We have different websites and things that you can subscribe to on our [vrtacqm.org](http://vrtacqm.org) website. And Additionally, I'm going to encourage you-- a little promo-- I do host a monthly podcast called "The Manager Minute". You can listen to it anywhere where podcasts are being published and listen in on those topics that are important to VR. You'll hear from other state directors and other staff around the country, other TA centers and people with topics that are really important to VR.

Tip five, learn about the history of VR. We are one of the oldest programs in the federal government. We were able to experience our 100-year anniversary a couple of years ago. And so it's really fun to take a look at where we started from and how that evolved over time. And the one thing that has been consistent is that Congress has put an emphasis on this program and helping individuals with disabilities to get into competitive, integrated employment. When you go to our website, all of these will be linked. You can go to take a look at all of the various acts and see how they've changed.

Tip six, learn about the State Rehabilitation Council. The State Rehabilitation Council is a very fundamental piece within the VR program. They provide an advisory kind of capacity to the VR agency and carry out a variety of really important functions. And it's important for you to understand what those are.

You want to definitely find out who your SRC members are. So that's your acronym number three, SRC. Who are your SRC members for the agency and meet with the chair. You want to know your members and understand the contributions that they bring to the SRC and to your agency.

We have some lovely resources around the SRC. There's written resources and we have a four-part series of webinars that will tell you all of the information you need to get you acclimated. So please do click that link.

Tip seven, familiarize yourself with the training and technical assistance centers. You want to bookmark the TA Centers' website so you can access them quickly and easily. And we have a link there to our RSA's website where all of the TA centers are listed. Sometimes folks coming in may worry, you're like, oh, I don't want to contact the TA center. Are they directly linked to RSA and they're going to tell our secrets? That is not how this works.

We are there. We are funded by RSA, but we are there to help you with any kind of troubles and concerns you have in meeting your requirements under the federal regulations. And we are meant to be an assistant to you and to help you. And so it's a very collegial relationship between all of us. So definitely do reach out.

Tip eight, understand that your agency is part of a larger network. The Workforce Innovation and Opportunity Act is the law designed to help people get the skills they need to find good jobs. And it focuses on improving job training programs, making it easier for job seekers to access education and training, and supporting people with barriers to employment, like disabilities or low income. And it connects the core partners that work in this space. And VR is just one of the partners in this group. You're going to want to get to know your core partners in your state and learn more about how you all work together.

Tip nine, read your state plan and understand the difference between the unified and the combined state plan. Since you're part of this larger network, there is a state plan that describes how you all work together in a strategy for your state's workforce development system. A unified plan includes all the six WIOA-- another acronym-- core programs. And a combined plan includes the six WIOA core programs and at least one combined state plan partner program. So check out the WIOA State Plan Portal and read your state plan. Also, talk to your agency state plan coordinator, whoever that is on your staff that has been charged with putting this together. They will have a great wealth of information for you to tap into.

Tip 10, the VR program juggles multiple annual cycles. It can feel a little bit like a math problem. I literally, when I got to my organization back in the day, I wrote down a little chart. I was like, OK, what report is due when? Fortunately, we have some of that for you all ready for you to access. The funding for VR is provided under a federal fiscal year. And that is operating from October 1 to September 30.

You also want to understand that the performance data that you will submit to the Feds happens under a federal program year, which is July 1 to June 30. You also want to understand your own state's fiscal year as well. Some states typically operate from July 1 to June 30, but we do have some anomalies out there, like October 1 to September 30. We have some other dates, like an April start date and all of that. So you want to take a look at your state and understand what they do.

Tip 11, know your money. You want to find out about your total amount of your federal grant award. The state's VR program is funded through a formula grant, often referred to as a Section 110 Grant Funds. The federal appropriation of which your grant award is a part, generally increases annually based on the Consumer Price Index for all Urban Consumers Percentage. However, the final appropriation amount can be impacted by different congressional actions.

Over \$4 billion is appropriated to the public VR program each year. You want to review the VR program fiscal management under grant award issuance information on the VRTAC-QM website. I have a link there for you to get to that. It's important to get a sense of your budget, how your spending flows, the reports you access and your financial position. Definitely talk with your fiscal staff about your budget, budget reporting, and your current financial position and set up a time to meet regularly with your team to track your financial position in alignment with your goals and your priorities.

Tip 12, the VR program has a state share and a cost matching requirement. The federal share of the grant is 78.7% and you must provide a state match of 21.3% to fully draw down this grant. So the federal and state shares really serve as a pie and work together to get the complete grant. RSA has a match calculator that will help you calculate both the non-federal share based on the grant award amount and the maximum amount of federal funds potentially available based on your non-federal share amount.

For more information, definitely check out our VRTAC-QM Program Fiscal Management and scroll down to match and cost-sharing. Definitely do your to-dos here. And you want to speak with fiscal staff about your agency's sources of match and learn how the history of those match sources came into existence, any special considerations your state may have as well around sustainability.

Tip 13, I'm saying this in bold, do not transfer federal award funds between general and blind agencies without talking to RSA first. If you are in a state with both a general and a blind agency and you wish to transfer funds between the programs, you must make a formal request with RSA to transfer funds. Do not use internal accounting adjustments to transfer funds between the two programs.

Tip 14, learn what regulations apply to the VR program. There are both program regulations and fiscal regulations. One way to learn and grow is to highlight and review regulatory sections as they come up in the course of doing your work. You may wish to print those out for those of you that like the paper like I do. Please do visit our laws, policies, and regulations page to learn more.

Here you will also find dedicated pages for legislation, WIOA regulations, VR program specific regulations, subregulatory guidance, fiscal and other federal guidance, and more on the Rehab Services Administration. When there's a discrepancy between the uniform grant guidance and federal regulations for the VR supported employment and IO programs, the program regulations supersede 2 CFR part 200. Know your own state rules and regulations and seek clarification when that occurs.

Tip 15, learn the language. Download the acronym list and keep it as a desk reference. I believe our team put together over 110 acronyms often used in VR. When I was a new VR director and started in my agency, I was stopping the meeting about every three minutes as people were telling me their acronyms. It felt like I was in a different country. I didn't understand the language. I didn't know what was going on.

A tip that was helpful for me was having that acronym list. And so as people were talking, I didn't have to keep stopping, stopping, stopping the conversation. I was able to look and go, OK, I was following along. And over time, you just get more used to it and you too will be speaking the language shortly.

Tip 16, learn disability etiquette. There are several really nice resources that can help with this topic, and I have those listed there. For those of you coming from outside of the vocational rehabilitation world, maybe you haven't been as exposed to individuals with disabilities, it is really important that you read through these because I want to make sure you don't make any missteps in your etiquette off the get-go.

Tip 17, there are five non-delegable responsibilities for VR. In our VR program regulations under 34 CFR 361.13(c)(2), it lays out those functions that must be reserved solely to the staff of the designated state unit, and those functions may not be delegated to any other agency or individual. At a minimum, those non-delegable responsibilities relate to decisions affecting the following-- eligibility, the nature and scope of services and the provision of those services, the determination that individuals achieved an employment outcome, policy formulation and implementation, the allocation and expenditure of VR funds, and participation of the designated state unit, which is you in the one-stop delivery system in accordance with Title I.

These are important for you to know and understand. And sometimes the larger designated state agency may take an action or overstep regarding the allocation and expenditure of funds or takes the decision making out of the DSUs hands. By understanding, you can be able to speak up and inform others about the regulatory requirements. Again, a to-do for you is reading TAC 12-03. We talked about this earlier. This is super critical. We have other very excellent trainings around non-delegable responsibilities on our VRTAC-QM website. So definitely take a look.

Tip 18, get into the data. You want to understand the performance measures and outcomes that are required of the program and you want to understand them also in comparison to the goals that you have in the state plan. RSA generates a quarterly data dashboard for every single VR agency, and you want to review those yourself for understanding and review them with your team so you all get grounded in a good understanding on the expectations of this particular requirement in our federal regulations.

I am sure you have your agency data specialist or specialists and you want to be able to take a look at what is happening both on your performance side of the house and your financial position. It is really important off the get-go that both sides are talking together and you are really looking at this as a group. If you're in a state with both a general and a blind agency, you want to meet with the other VR agency staff to discuss your joint performance accountability measures, as well as other things that you are jointly responsible for together.

Tip 19, follow the reporting requirements. Like I was saying earlier, there's many reports due many different times and it can be a little bit of a puzzle putting it together. We have a handy dandy guide for you on federal reports and deadlines. I would definitely download that or bookmark it. You could calendar yourself so you know when reports are due and ensure that everybody in your agency is keeping up on that because you want to make sure that you are not reporting late.

And then finally, tip 20, participate in training and find a buddy. There are so many great resources out there and connections, including our national associations. There's the Council of State Administrators for Vocational Rehabilitation. There's the National Council of State Agencies for the Blind. And there is also

an entity called the National Rehabilitation Leadership Institute. This is a training resource that really helps to connect up and coming leaders and leaders in the VR program with people across the country.

So definitely sign up for CSAVR training. They have two conferences a year, as does NCSAB. But they also have a leadership forum. And it's a great way, prior to the conference starting, to get to meet other leaders across the country. Take a look at the NRLI website and reach out to the associations and see how you might be able to get connected with a buddy. That helped me early on. Allison Flanagan was my buddy way back in the day and helped me as I was a new director and getting going. Definitely ask your buddy about their top three recommendations for what they would look at being a new VR administrator.

Thanks for participating. This is it. That was the top 20 tips. So take some time, go back to the website. I hit them very high level, but you can dig in and do it at your own pace to get grounded. And if you ever have any questions, you can reach out to us at the VRTAC for Quality Management. Thanks and have a great day you guys.