



STATE OF VERMONT
JOINT FISCAL OFFICE

MEMORANDUM

To: Joint Fiscal Committee members
From: Sorsha Anderson, Staff Associate
Date: January 26, 2021
Subject: Grant Requests – JFO #3030

Enclosed please find one (1) item, which the Joint Fiscal Office has received from the Administration.

JFO #3030 - \$450,000 to the VT Department of Disabilities, Aging and Independent Living from the Kessler Foundation. Funds will be used to support the expansion or re-designation of current positions in the Department and to create three (3) limited service positions to assist Social Security Disability Insurance and Supplemental Security Income beneficiaries to transition to self-sustaining employment. The request includes one (1) Vocational Rehabilitation Benefits Counselor and two (2) Vocational Rehabilitation Counselor II to complete the work. **[NOTE: Kessler grant funds will support 70% of the VR Benefit Counselor position and 21% of the VR Counselor II positions. The remaining balance will be covered by VR federal funds.]**

[JFO received 1/25/2021]

Please review the enclosed materials and notify the Joint Fiscal Office (Sorsha Anderson: sanderson@leg.state.vt.us) if you have questions or would like this item held for legislative review. Unless we hear from you to the contrary by February 15, 2021, we will assume that you agree to consider as final the Governor's acceptance of this request.

STATE OF VERMONT REQUEST FOR GRANT (*) ACCEPTANCE (Form AA-1)

BASIC GRANT INFORMATION				
1. Agency:	Human Services			
2. Department:	DAIL			
3. Program:	Division of Vocational Rehabilitation			
4. Legal Title of Grant:	Kessler Foundation, Signature Employment Initiative, Better Option than Social Security (BOSS) Project			
5. Federal Catalog #:	Foundation Grant			
6. Grant/Donor Name and Address:	Kessler Foundation 120 Eagle Rock Avenue East Hanover, NJ 07936-3147			
7. Grant Period:	From:	1/1/2020	To:	12/31/2021
8. Purpose of Grant:	To test innovative strategies to assist Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) beneficiaries transition off benefits to self sustaining employment			
9. Impact on existing program if grant is not Accepted:	None			
10. BUDGET INFORMATION				
	SFY 1	SFY 2	SFY 3	Comments
Expenditures:	FY 2020	FY 2021	FY 2022	
Personal Services	\$219,887	\$439,776	\$219,887	
Operating Expenses	\$37,500	\$75,000	\$37,500	
Grants	\$25,000	\$50,000	\$25,000	
Total	\$282,387	\$564,776	\$282,387	
Revenues:				
State Funds:	\$16,875	\$33,750	\$16,875	
Cash	\$16,875	\$33,750	\$16,875	
In-Kind	\$12,500	\$25,000	\$12,500	
Federal Funds:	\$140,512	\$281,026	\$140,512	
(Direct Costs)	\$117,712	\$235,426	\$117,712	
(Statewide Indirect)	\$	\$	\$	
(Departmental Indirect)	\$22,800	\$45,600	\$22,800	
Other Funds:	\$112,500	\$225,000	\$112,500	
Grant (source Kessler)	\$112,500	\$225,000	\$112,500	
Total	\$282,387	\$564,776	\$282,387	
Appropriation No:		Amount:	\$	
	3460015000		\$87,500	
	3460040000		\$25,000	
			\$	
			\$	
			\$	
			\$	
		Total	\$112,500	

STATE OF VERMONT REQUEST FOR GRANT (*) ACCEPTANCE (Form AA-1)

PERSONAL SERVICE INFORMATION

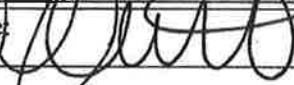
11. Will monies from this grant be used to fund one or more Personal Service Contracts? Yes No
 If "Yes", appointing authority must initial here to indicate intent to follow current competitive bidding process/policy.

Appointing Authority Name: Monica Hutt Commissioner DAIL Agreed by: MCH (initial)

12. Limited Service Position Information:	# Positions	Title
	1	VR Benefits Counselor
	2	Part Time (.5 FTE) VR Counselor II
Total Positions	3	

12a. Equipment and space for these positions: Is presently available. Can be obtained with available funds.

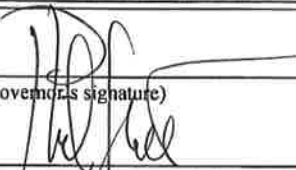
13. AUTHORIZATION AGENCY/DEPARTMENT

I/we certify that no funds beyond basic application preparation and filing costs have been expended or committed in anticipation of Joint Fiscal Committee approval of this grant, unless previous notification was made on Form AA-1PN (if applicable):	Signature: 	Date: 1/16/2020
	Title: Commissioner	
	Signature: Sarah Clark	Date: 1/27/20
	Title: CFO	

14. SECRETARY OF ADMINISTRATION

Approved: (Secretary or designee signature) **Kristin Clouser** Digitally signed by Kristin Clouser Date: 2020.11.03 14:19:01 -05'00' Date:

15. ACTION BY GOVERNOR

Check One Box: Accepted (Governor's signature)  Date: 1/27/20

Rejected

16. DOCUMENTATION REQUIRED

Required GRANT Documentation	
<input checked="" type="checkbox"/> Request Memo	<input type="checkbox"/> Notice of Donation (if any)
<input type="checkbox"/> Dept. project approval (if applicable)	<input type="checkbox"/> Grant (Project) Timeline (if applicable)
<input checked="" type="checkbox"/> Notice of Award	<input type="checkbox"/> Request for Extension (if applicable)
<input checked="" type="checkbox"/> Grant Agreement	<input type="checkbox"/> Form AA-1PN attached (if applicable)
<input checked="" type="checkbox"/> Grant Budget	

End Form AA-1

(*) The term "grant" refers to any grant, gift, loan, or any sum of money or thing of value to be accepted by any agency, department, commission, board, or other part of state government (see 32 V.S.A. §5).

OK 1/27/20

**STATE OF VERMONT
Joint Fiscal Committee Review
Limited Service - Grant Funded
Position Request Form**

This form is to be used by agencies and departments when additional grant funded positions are being requested. Review and approval by the Department of Human Resources must be obtained prior to review by the Department of Finance and Management. The Department of Finance will forward requests to the Joint Fiscal Office for JFC review. A Request for Classification Review Form (RFR) and an updated organizational chart showing to whom the new position(s) would report must be attached to this form. Please attach additional pages as necessary to provide enough detail.

Agency/Department: Department of Disabilities, Aging and Independent Living Date: 12/30/19

Name and Phone (of the person completing this request): James Smith (802) 241- 030

Request is for:

- Positions funded and attached to a new grant.
 Positions funded and attached to an existing grant approved by JFO # _____

1. Name of Granting Agency, Title of Grant, Grant Funding Detail (attach grant documents):

Kessler Foundation, Signature Employment Initiative, Better Option than Social Security (BOSS) Project

2. List below titles, number of positions in each title, program area, and limited service end date (information should be based on grant award and should match information provided on the RFR) position(s) will be established only after JFC final approval:

<u>Title* of Position(s) Requested</u>	<u># of Positions</u>	<u>Division/Program</u>	<u>Grant Funding Period/Anticipated End Date</u>
VR Counselor II	2	DVR	12/31/2021
VR Benefits Counselor	1	DVR	12/31/2021

*Final determination of title and pay grade to be made by the Department of Human Resources Classification Division upon submission and review of Request for Classification Review.

3. Justification for this request as an essential grant program need:

The BOSS Project seeks to assist Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) beneficiaries enter the workforce in self sustaining employment. The BOSS project will be implemented in two sites in Vermont, Burlington and Rutland. Each site will enroll 100 SSDI/SSI beneficiaries (200 total) by July 1, 2020. The three positions will provide DVR the necessary capacity to deliver the proposed intervention.

I certify that this information is correct and that necessary funding, space and equipment for the above position(s) are available (required by 32 VSA Sec. 50b).

[Signature] / Dorah Claver Date: 2/11/2020 3/4/20
 Signature of Agency or Department Head Date

[Signature] Date: 3/5/20
 Approved/Denied by Department of Human Resources Date

Adam Greshin Digitally signed by Adam Greshin
 Date: 2020.10.15 14:01:28 -04'00'

Approved/Denied by Finance and Management Date
Kristin Clouser Digitally signed by Kristin Clouser
 Date: 2021.01.21 18:19:59 -05'00'

Approved/Denied by Secretary of Administration Date

[Signature] Date: 1/22/21
 Approved/Denied by Governor (required as amended by 2019 Leg. Session) Date

Comments:

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State of Vermont
 Department of Finance & Management
 109 State Street, Pavilion Building
 Montpelier, VT 05620-0401

[phone] 802-828-2376
 [fax] 802-828-2428

Agency of Administration

**STATE OF VERMONT
 FINANCE & MANAGEMENT GRANT REVIEW FORM**

Grant Summary:		Grant from Kessler Foundation to test innovative strategies to assist Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) beneficiaries transition off benefits to self sustaining employment.			
Date:		11/24/2020			
Department:		AHS / DAIL			
Legal Title of Grant:		Kessler Foundation, Signature Employment Initiative, Better Option than Social Security (BOSS) Project			
Federal Catalog #:		Foundation Grant			
Grant/Donor Name and Address:		Kessler Foundation 120 Eagle Rock Avenue East Hanover,NJ 07936-3147			
Grant Period:		From:	To:		
		1/1/2020	12/31/2021		
Grant/Donation					
	SFY 1	SFY 2	SFY 3	Total	Comments
Grant Amount:	\$112,500	225,000	112,500	450,000	
Position Information:		# Positions	Explanation/Comments		
		3	3 limited service positions – 1 VR Benefits Counselor, and 2 (.5 FTE) part-time VR Counselor II		
Additional Comments:					
Department of Finance & Management				Adam Greshin <small>Digitally signed by Adam Greshin Date: 2020.11.24 10:40:23 -0500</small>	(Initial)
Secretary of Administration				Kristin Clouser <small>Digitally signed by Kristin Clouser Date: 2020.11.24 14:38:58 -0500</small>	(Initial)
Sent To Joint Fiscal Office					Date



MEMORANDUM

TO: The Joint Fiscal Committee

FROM: Monica Hutt, Commissioner DAIL

DATE: February 11, 2020

SUBJECT: AA-1 Request for Kessler Foundation, Signature Employment Initiative, Better Option than Social Security (BOSS)

This is a request from the Department of Disabilities, Aging and Independent Living (DAIL) to the Joint Fiscal Committee to approve acceptance of the Kessler Foundation Signature Employment Initiative grant funding.

Background

On December 13, 2019, DAIL/DVR received notice of the grant award from the Kessler Foundation. DAIL/DVR had submitted a grant application to Kessler designed to increase the number of Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) beneficiaries served by DVR who could return to the workforce and achieve self-sustaining employment.

Job opportunities for people with disabilities have never been greater than they are now. It remains the case, however, that many SSDI/SSI beneficiaries are not taking full advantage of their own productive capacities. Most do not work at all, and of those who do work, most do so at a level that is not self-sustaining; they rely on a combination of benefits and low earnings. Even with income from both sources, many still live in poverty and are likely to do so for the rest of their lives.

Despite a relatively strong track record serving SSI and SSDI beneficiaries, we are convinced that DVR can do better. Therefore, BOSS will implement a new VR service package that specifically addresses the challenges that deter the many beneficiaries who could achieve self-sustaining employment from actually doing so. The BOSS program includes:

- A specialized DVR service package specifically intended to support higher-wage employment, including credentialed training or re-training in high-demand and higher-wage fields. VR counselors and job placement specialists would be reoriented to focus on self-sustaining employment as the goal.
- Added benefits counseling capacity designed specifically to support the beneficiary during the transition to self-sufficiency.

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- Self-directed financial support at key milestone points to assist the beneficiary in managing the transition to living entirely on earned income. DVR will provide the beneficiary \$750 at the first month of benefits cessation, and \$500 at the third month of benefits cessation

Term and Amount of Grant

The total award to DAIL/DVR is \$450,000. The term of the grant is January 1, 2020, through December 31, 2021. Kessler allows no-cost extensions.

Project Design

DVR will implement a new service package that specifically addresses the challenges that deter the many beneficiaries who could achieve self-sustaining employment from actually doing so. The Better Option than Social Security (BOSS) program includes:

- A specialized DVR service package specifically intended to support higher-wage employment, including credentialed training or re-training in high-demand and higher-wage fields
- Added benefits counseling capacity designed specifically to support the beneficiary during the transition to self-sufficiency.
- Self-directed financial support at key milestone points to assist the beneficiary in managing the transition to living entirely on earned income.

The BOSS project will be implemented in two sites in Vermont, Burlington and Rutland. We will deploy a specialized team at each site including a full-time vocational rehabilitation counselor, a full-time contracted job placement specialist, and a time benefits counselor. Each site will enroll 100 SSDI/SSI beneficiaries by July 1, 2020. We are proposing the following service deliverables for the 200 participants enrolled:

- 200 participants (100%) will develop an Individual Plan for Employment with the VR counselor that includes a plan to exit SSI/SSDI.
- 200 participants (100%) will receive a written Benefits Summary and Analysis (BS&A) followed by ongoing benefits counseling.
- 120 participants (60%) will be referred to the job placement specialist for direct assistance with employment placement.
- 60 participants (30%) will be enrolled in post-secondary training programs with the goal of achieving an industry-recognized credential in a high-wage field.

A primary partner in the BOSS project is the Vermont Association for Business Industry and Rehabilitation (VABIR). VABIR is a nonprofit community rehabilitation program that will provide the job placement staff. The other major partner is the Department of Mental Health,

which oversees supported employment services provided through the community mental health system.

Project Goals

The proposed outcome targets are:

- 160 participants (80%) will enter employment at a part-time or full-time level.
- 40 participants (20%) will complete an industry-recognized credential.
- 100 participants (50%) will have earnings that result in a cessation of SSI/SSDI benefits.

Contact Person for Project

James Smith
DVR Budget and Policy Manager
james.smith@vermont.gov
(802) 241-0320

**SIGNATURE EMPLOYMENT GRANT
ATTACHMENT FOUR**

Better Option than Social Security (BOSS) Project

Budget Narrative

SECTION I: REVENUE

Division of Vocational Rehabilitation (DVR) 110 Funds: \$562,050

If selected, DVR will assign \$562,050 of the state/federal 110 grant award to the BOSS project for the two-year grant period.

Kessler Foundation Signature Employment Grant: \$450,000

DVR will use Kessler funds to add the necessary capacity to implement the BOSS project. Also, DVR will specifically assign Kessler funds for the short-term financial supports proposed in the grant application as it is currently not allowable for DVR to use 110 funds for this purpose. We believe the provision of short-term financial assistance, at the point the beneficiary ceases to receive SSI or SSDI, is a crucial component of the intervention. Access to Kessler funds will allow us to test the impact of this intervention.

Department of Mental Health (DMH) Medicaid Supported Employment and Case Management Funds: \$50,000

Many beneficiaries served by DVR have psychiatric disabilities and are also served by our local community mental health agencies in the two sites. These are non-profit community mental health organizations that provide case management and supported employment services funded through the Vermont Department of Mental Health Medicaid services. We expect a portion of beneficiaries served under this project will concurrently receive these services. It is crucial that these services are coordinated with the project. Therefore, the agencies will assign a portion of their supported employment and case management staff time to support their consumers who are enrolled in the BOSS project. These staff members will work as a team with the VR counselor and the VR benefits counselor to support the beneficiary.

State of Vermont General Fund Match: \$67,500

If selected, the Department of Disabilities, Aging and Independent Living (DAIL) will assign \$67,500 of State General Funds to DVR and the BOSS project. These funds will not be matched to any other federal funding source. DAIL will track the use of these funds by DVR to the Kessler Signature Employment Grant through a separate program code.

SECTION II: EXPENSES

Staffing

The project will be implemented within the Vermont Division of Vocational Rehabilitation. All staff are employees of Vermont DVR and receive full state benefits packages. Staff salaries are determined by the state government pay grade for the position and length of service. Betsy Choquette will be the BOSS project director at a 0.2 FTE and will manage the overall implementation in the two sites. DVR will assign two full time vocational rehabilitation counselors to the project. Each will enroll a minimum of 100 beneficiaries into the project over the two-year term. This is a smaller caseload than would typically be held by a counselor in Vermont. This is intentional as we expect the counselor to provide more intensive services. DVR will also assign two 0.5 FTE benefits counselors to each of the two sites. The benefits counselors will provide intensive benefits counseling for project participants, directed at supporting individuals transitioning off of benefits. The benefits counselors will be qualified Certified Work Incentive Counselors (CWIC).

Staff Person and Title	Total Salary Costs for Two Year Project Term	Kessler Request Year One	Kessler Request Year Two
Betsy Choquette Project Manager 20% FTE	\$27,000	\$13,500	\$13,500
Kristy Malone DVR Counselor Site One 100% FTE	\$124,000	\$13,020	\$13,020
Kristen Carpentier DVR Counselor Site Two 100% FTE	\$123,000	\$12,915	\$12,915
Sarah L'Homme DVR Benefits Counselor Site One 50% FTE	\$49,000	\$17,500	\$17,500
Amanda Barrett DVR Benefits Counselor Site Two 50% FTE	\$53,000	\$20,000	\$20,000
Total Salaries	\$376,000	\$76,935	\$76,935

James Smith, DVR Budget and Policy Manager, will supervise Ms. Choquette, the BOSS project director, and support overall implementation. Because Mr. Smith is a designated manager, his time is not charged directly to DVR or Kessler grant funding. Mr. Smith's salary and fringe costs are allocated across programs and are covered under DVR's indirect rates.

Fringe Benefits

As noted, all staff are employees of the State of Vermont and receive the state government benefits package. The individual fringe rates for staff depend on both the number of dependents and the healthcare options selected. Ranges vary by individual. A complete description of the State of Vermont employee salaries and benefits can be found at:

<http://www.vermontpersonnel.org/employee/benefits.cfm>

DVR estimates the total fringe for the project will be \$169,000 over the two-year term. DVR is requesting \$59,880 in Kessler funds for fringe benefits.

Total Staffing Costs: \$545,000

Operating Costs

Training Costs \$10,000: DVR will require the two vocational rehabilitation counselors to attend the Certified Work Incentive Counselor (CWIC) training program provided by the Social Security Administration. The intent is not to make these staff benefits counselors but to ground them in the complexities of the SSI and SSDI programs. We believe this will give them a strong foundation for their vocational counseling with this population. The DVR benefits counselors assigned to the project will already be qualified CWIC. The costs associated with this training are for lodging and travel. Information on the CWIC program can be found at: <https://vcu-ntdc.org/training/initial/initial.cfm>

Staff Travel and Meeting Costs \$10,000: The project will budget \$10,000 for in-state mileage, primarily for the two vocational rehabilitation counselors and the benefits counselors. Mileage is reimbursed at the federal rate.

DVR is not requesting any Kessler funds for operating costs.

Total Operating Costs: \$20,000

Transitional Payments for Beneficiaries

Transitional Payments for Beneficiaries Who Zero Out Their Benefits \$100,000: As noted in the BOSS project proposal, DVR will provide two cash payments for beneficiaries; one payment of \$750 at the first month of benefit cessation and \$500 at the third month of cessation. DVR is anticipating 100 of the 200 (50%) enrollees to cease benefits for at least one month and 50 (25%) enrollees to cease benefits for three months during the grant term.

As noted, DVR cannot use Vocational Rehabilitation 110 funds for cash support. Therefore, we are planning to use 100% Kessler funds for this line item. If a higher proportion of beneficiaries cease receiving benefits, which is our goal, DVR will redirect State General Funds to meet our obligations.

Total Transitional Payments for Beneficiaries: \$100,000

Collaborators

DMH Medicaid Supported Employment and Case Management Funds \$50,000: As noted in the Revenue Section, the DMH funded community mental health programs will assign staff time from their supported employment and case management services to team with the DVR staff. The total commitment will depend on the number of enrollees who are also served by the community mental health agencies. Very conservatively, we estimate this commitment to be \$50,000 during the project term. This assumes that 20 individuals will be enrolled in the BOSS project over the grant term and receive \$2,500 worth of supported employment and case management services.

Vermont Association of Business Industry and Rehabilitation (VABIR) Employment Consultant Contracted Services \$270,000: VABIR is a private non-profit community rehabilitation provider. VABIR provides contracted job placement services for the DVR program. VABIR will provide two dedicated job placement specialists to work with beneficiaries enrolled in the BOSS project. The employment consultants will work as a team with the DVR counselors and the DVR benefits counselor to provide coordinated vocational services for the beneficiary. The total contracted cost for these positions is \$270,000 for the project term. DVR is requesting \$97,450 in Kessler funds for this contract.

David Stapleton \$14,550: Dr. Stapleton will serve as an expert consultant for DVR for the BOSS project. Dr. Stapleton is a nationally recognized expert on SSI/SSDI, return to work, the Ticket to Work program and a resident of Waterbury, Vermont. He will advise the project around implementation and evaluation and assist us with dissemination of best practices and lessons learned. Dr. Stapleton will be contracted at \$205 per hour for up to 30 hours for year one and \$210 per hour for up to 40 hours year two.

Total Collaborators' Costs: \$334,550

Total Direct Costs: \$999,550

Indirect Costs

The State of Vermont has a federally approved cost allocation plan for all state agencies. A copy of the cost allocation plan and approval can be found at:

<http://humanservices.vermont.gov/departments/office-of-the-secretary/cost-allocation-plan> . The cost allocation plan requires that all the regional and central supporting costs be shared among funded projects. These funds support the location of project staff in the DVR central office and in the twelve regional and district offices. This includes rent, utilities, supervision, clerical support and other administrative overhead. It also includes the costs of the DVR management staff that oversee the program.

We estimate the indirect costs for this project to be about \$130,000. We are requesting \$38,800 in Kessler funds for these costs.

Total Indirect Costs: \$130,000

Total Project Costs: \$1,129,550

**Kessler Foundation Project Budget
Signature Employment Grant Program**

Vermont Division of Vocational Rehabilitation
Better Option than Social Security (BOSS) Project
January 1, 2020
December 31, 2021

Name of Organization:
Project Title:
Project Start Date:
Project End Date:

	Total Project	Grant Request Yr 1	Grant Request Yr 2	Total Requested From Kessler
INCOME				
Grants VR 110	\$ 562,050			\$ -
Amount Requested From Kessler	\$ 450,000	\$ 225,000	\$ 225,000	\$ 450,000
MH Agencies - Supported Employment	\$ 50,000			\$ -
Other - State Match	\$ 67,500			\$ -
TOTAL INCOME	\$ 1,129,550	\$ 225,000	\$ 225,000	\$ 450,000

	Total Project	Kessler Grant Request Yr 1	Kessler Grant Request Yr 2	Total Requested From Kessler
EXPENSES				
Personnel Costs	\$ 545,000	\$ 106,875	\$ 106,875	\$ 213,750
Staff: Salaries & Wages (list: Name, Title, Percent of Time)				
Betsy Choquette, Program Manager; 20%	\$ 27,000	\$ 13,500	\$ 13,500	\$ 27,000
Kristy Malone, VR Counselor; 100%	\$ 124,000	\$ 13,020	\$ 13,020	\$ 26,040
Kristen Carpenter, VR Counselor; 100%	\$ 123,000	\$ 12,915	\$ 12,915	\$ 25,830
Sarah L'Homme, Benefits Counselor; 50%	\$ 49,000	\$ 17,500	\$ 17,500	\$ 35,000
Amanda Barrett, Benefits Counselor; 50%	\$ 53,000	\$ 20,000	\$ 20,000	\$ 40,000
Fringe Benefits	\$ 169,000	\$ 29,940	\$ 29,940	\$ 59,880
Training	\$ 10,000			\$ -
Travel & Meeting Costs	\$ 10,000			\$ -
Transitional payments for beneficiaries who zero out their benefits	\$ 100,000	\$ 50,000	\$ 50,000	\$ 100,000
Consultants/Collaborators (list)				
MH Agencies - Supported Employment	\$ 50,000			\$ -
2 FTE Contracted VABIR Job Placement Specialists	\$ 270,000	\$ 48,725	\$ 48,725	\$ 97,450
David Stapleton	\$ 14,550			
Indirect Costs (up to 15%)	\$ 130,000	\$ 19,400	\$ 19,400	\$ 38,800
TOTAL EXPENSES	\$ 1,129,550	\$ 225,000	\$ 225,000	\$ 450,000

NOTE: The preparation of a detailed project budget and budget narrative is an important component of the proposal submission process. Please delete any categories that are not included in your budget. Subcategories may be added as appropriate. Include Full-Time Equivalent (FTE) information for each person where funds are requested. Budget may be uploaded as an Excel or PDF.



**SIGNATURE EMPLOYMENT PROGRAM
MULTI-YEAR GRANT AWARD
AGREEMENT**

Grant Recipient: State of Vermont, Division of Vocational Rehabilitation

Contract Date: December 13, 2019

Employer ID Number: 036000274

Grant Number: 1254-2652-SEG-FY2019

Grant Amount: \$450,000.00

Grant Term: 1/1/2020 – 12/31/2021

Reporting: Financial Reports are due quarterly and Interim Progress Reports are due every six months. A reporting schedule of due dates will be provided to you after we receive your signed contract; documentation of your obtaining matching funds; and a document confirming project goals and deliverables.

THIS MULTI-YEAR GRANT AWARD AGREEMENT (“Agreement”) is made and entered into this thirteenth day of December, 2019, by and between Kessler Foundation (the “Foundation”) and State of Vermont, Division of Vocational Rehabilitation (“Grant Recipient”).

WHEREAS, Grant Recipient has submitted an application and related material to the Foundation received on 6/10/2019 (the “Proposal”) to fund the project described therein (the “Grant Project”); and

WHEREAS, Foundation agrees to make a grant to provide the Grant Amount to Grant Recipient to fund the Grant Project, subject to the terms and conditions set forth herein (the “Grant”).

1. Use of Grant Funds. Grant Recipient agrees that the funds (“Grant Funds) granted by the Foundation will be used only for the purposes described above and described in the Proposal provided to the Foundation in connection with this Grant. Neither Grant Recipient nor the Foundation has designated the Grant Funds or any portion thereof for any organization or

individual other than the Grant Recipient. Grant Recipient agrees that the Grant Funds will be expended only as specifically stated or itemized in the Proposal. Any deviation from such must be approved in writing by the Foundation.

2. Matching Funds Requirement. Grant Recipient agrees to match the funds granted by the Foundation with cash funding for the Grant Project from one or more third party sources in an amount of at least fifteen (15) percent of the Foundation's funding. Matching Funds must be designated by the donor specifically to the Grant Project, and cannot be funded by undesignated funds being contributed to the Grant Recipient. Grant Recipient agrees to submit satisfactory evidence to the Foundation of monies that meet the matching requirement. Initial funds for the project may, at the discretion of the Foundation, be disbursed by the Foundation based upon evidence of a pledge of matching funds, but the cash must be received by the Grant Recipient within 6 months of the date of the pledge in order for the Foundation to continue its funding of the Grant Project.

3. Payment of Grant Funds. The release of the initial grant installment is contingent upon the following: receipt by the Foundation of documentation with the source, date, and amount of cash funding or a pledge of cash funding that meet the Matching Funds Requirement, and a document confirming project goals and deliverables. The Foundation has the right to delay payment of Grant Funds if the previous installment has not been expended at the time of the next disbursement as indicated in the Grant Recipient's quarterly budget report. The Grant Funds will be paid by the Foundation in eight (8) installments. We will forward you the dates after we have received the required documentation.

4. Quality of Work. Both the quality of the work done and progress toward achieving the goals of the Grant Project will be reviewed by the Foundation, and progress may be monitored by on-site visits by representatives of the Foundation. In particular, the Foundation will monitor the continued commitment of personnel involved in the work of the Grant Project. In addition, the Foundation will, throughout the Grant Term, consider whether continuation of the work of the Grant Project is in the interest of the Foundation. If the Foundation (i) is not satisfied with the quality of work or the progress toward completing the work of the Grant Project, (ii) is of the opinion that the Grant Recipient is incapable of satisfactorily completing the work of the Grant Project, or (iii) determines that continuation of the Grant is not reasonably in the interest of the Foundation, the Foundation may, in its sole discretion, (x) withhold payment of Grant Funds until in the Foundation's opinion, the situation has been corrected, or (y) declare the Grant terminated. The Foundation's determination as to the quality of work being performed, the progress being made toward the goals of the Grant Project, ability to satisfactorily complete the work of the Grant, and whether continuation of the work of the Grant is in the interest of the Foundation will be final and will be binding and conclusive upon Grant Recipient insofar as further payments of Grant Funds are concerned.

5. Certification and Maintenance of Exempt Organization Status.

Grant Recipient hereby certifies that it has been determined by the Internal Revenue Service to be a tax-exempt organization under the Internal Revenue Code. Grant Recipient hereby agrees that it will immediately inform the Foundation of any change in or challenge to its status as a tax-exempt organization. Grant Recipient hereby agrees it will comply with the provisions of the Internal Revenue Code and the regulations hereunder applicable and will not violate any other statute or regulation applicable to it where such violation materially affects its ability to carry out the goals of the Grant.

6. Reports. Grant Recipient hereby agrees it will submit detailed quarterly financial reports concerning the use of the Grant Funds, in compliance with the terms of the Grant, and reports every six months detailing the progress made toward achieving the goals of the Grant. Grant Recipient hereby agrees it will submit these reports to the Foundation on the use of the Grant Funds, reflecting all expenditures made from the Grant Funds (including salaries, travel and supplies) and indicating the progress made toward the goals of the Grant. In addition to the quarterly reports, Grant Recipient agrees it will submit half-yearly progress reports as outlined in the grant acceptance letter attached herein, along with other such reports as the Foundation may reasonably request, and will cause its personnel to confer with Foundation personnel or consultants at the reasonable request of the Foundation regarding expenditures, records and progress of the Grant Project.

7. Records. Grant Recipient hereby agrees it will maintain its books and records in such a manner that the receipts and expenditures of the Grant Funds will be shown separately on such books and records. Grant Recipient hereby agrees it will keep records of receipts and expenditures of Grant Funds as well as copies of the reports submitted to the Foundation and supporting documentation available to the Foundation for inspection at reasonable times from the time of acceptance of this Grant until one year after Grant Recipient's Final Report has been submitted to the Foundation.

8. Acknowledgment of Support; Publicity/Use of Project Results.

All manuscripts, papers, releases, exhibits or interviews prepared for scientific meetings, the public or private press, magazines, periodicals, radio, television or other means of communication dealing with the activities or achievement of the work of the Grant shall clearly and prominently identify Kessler Foundation as a funding source.

If Grant Recipient desires to publish the results of this Project, the Foundation shall have a minimum of thirty (30) days to review and comment upon the document before submission for publication. Should Grant Recipient desire to use or apply data or other information derived from the Project for purposes other than those set forth in the Proposal, including but not limited to academic research and/or publication in a journal or trade publication, and Grant

Recipient acknowledges or credits the Foundation for its involvement in the Project, the Foundation must be notified.

9. Violation of Terms; Change of Status. In the case of any violation by Grant Recipient of the terms and conditions of the Grant, including but not limited to the failure to accomplish the work of the Grant Project in substantial compliance with the proposal, or in the event of any change in or challenge by the Internal Revenue Service of Grant Recipient's status as a Public Charity, the Foundation reserves the right in its absolute discretion to terminate the Grant. The Foundation's determination will be final and will be binding and conclusive upon Grant Recipient.

If any report is not received in a timely manner, the Foundation may withhold payment until the outstanding report is received, and may terminate the Grant if any such report is not received within a reasonable time (not more than sixty [60] days) following the date on which it was due, if applicable.

10. Termination. Upon termination of this Grant for any reason, the Foundation will withhold any further payments of Grant Funds and Grant Recipient will repay to the Foundation any portion of the Grant Funds that were not spent for the Grant Project.

11. Future Funding. Grant Recipient understands and acknowledges that the Foundation and its representatives have made no actual or implied promise of funding except for the amounts specified by this Agreement. If any of the Grant Funds are returned or if the Grant is rescinded, Grant Recipient agrees and acknowledges that the Foundation will have no further obligation to Grant Recipient in connection with this Grant as a result of such return or rescission.

12. Joint Ownership of Intellectual Property, License. Grant Recipient and the Foundation agree that any and all intellectual property including copyrightable material(s) created during the Grant Term shall be jointly owned by the Grant Recipient and the Foundation ("Jointly-Owned Intellectual Property"). In addition, the Grant Recipient hereby grants to the Foundation, a non-exclusive, perpetual, royalty-free license and right to use, display or disseminate any Jointly-Owned Intellectual Property created or developed during the Grant Term.

13. Indemnification. The Foundation is a funding source only and does not participate in or direct any of the activities or services of Grant Recipient. Accordingly, Grant Recipient understands and agrees that the Foundation, its directors, officers, employees and agents will not be liable for any of Grant Recipient's contracts, torts, or other acts or omissions, or those by Grant Recipient's directors, officers, members, employees or funded-activity participants. Grant Recipient understands and agrees that the Foundation's insurance policies or self-insurance plans do not extend to or protect Grant Recipient nor Grant Recipient's directors, officers, members, staff or funded-activity participants. Grant Recipient understands and agrees that the Foundation

will not provide any legal defense for Grant Recipient or any such person in the event of any claim against any or all of them. Unless prohibited by law, Grant Recipient shall defend, indemnify and hold the Foundation harmless from all liability, including but not limited to costs of defense, from the contracts, torts or other acts or omissions of the Grant Recipient, its employees, directors, officers, employees or funded-activity participants in any way connected with any activity of Grant Recipient including but not limited to the funded activity.

14. Relationship of Parties. Foundation and Grantee agree that this Grant does not create a principal-agent relationship of any type between the parties and that Grantee will not, by act of omission or commission, foster any belief on the part of third parties that such relationship exists.

15. Modification. This Agreement sets forth all terms of the Grant and replaces all prior understandings and agreements. Any modification or amendment of this Agreement will be made only in writing signed by an authorized officer of Grant Recipient and of the Foundation.

16. Applicable Law. This agreement will be construed in accordance with the laws of the State of New Jersey.


Kessler Foundation

By:



Rodger L. DeRose
President & CEO

By:



Elaine E. Katz, MS, CCC-SLP
Senior Vice President of Grants and
Communications

Date:

12-13-19

Date:

12/13/19

Accepted by Grant Recipient:

State of Vermont, Division of Vocational Rehabilitation

By: _____

(Signature)

Print Name: _____

Title: _____

Date: _____

Request for Classification Action
New or Vacant Positions
EXISTING Job Class/Title ONLY
Position Description Form C/Notice of Action
For Department of Personnel Use Only

Notice of Action # _____		Date Received (Stamp) _____
Action Taken: _____		
New Job Title _____		
Current Class Code _____	New Class Code _____	
Current Pay Grade _____	New Pay Grade _____	
Current Mgt Level _____ B/U _____ OT Cat. _____ EEO Cat. _____ FLSA _____		
New Mgt Level _____ B/U _____ OT Cat. _____ EEO Cat. _____ FLSA _____		
Classification Analyst _____	Date _____	Effective Date: _____
Comments: _____		Date Processed: _____
Willis Rating/Components: _____	Knowledge & Skills: _____	Mental Demands: _____
	Working Conditions: _____	Accountability: _____
	Total: _____	

Position Information:

Incumbent: **Vacant or New Position**

Position Number: Current Job/Class Title:

Agency/Department/Unit: GUC:

Pay Group: Work Station: Zip Code:

Position Type: Permanent Limited Service (end date)

Funding Source: Core Sponsored Partnership. For Partnership positions provide the funding breakdown (% General Fund, % Federal, etc.)

Supervisor's Name, Title and Phone Number:

Check the type of request (new or vacant position) and complete the appropriate section.

New Position(s):

a. **REQUIRED:** Allocation requested: Existing Class Code Existing Job/Class Title:

b. Position authorized by:

- Joint Fiscal Office – JFO # Approval Date:
- Legislature – Provide statutory citation (e.g. Act XX, Section XXX(x), XXXX session)
- Other (explain) -- Provide statutory citation if appropriate.

Vacant Position:

- a. Position Number:
- b. Date position became vacant:
- c. Current Job/Class Code: Current Job/Class Title:
- d. REQUIRED: Requested (existing) Job/Class Code: Requested (existing) Job/Class Title:
- e. Are there any other changes to this position; for example: change of supervisor, GUC, work station? Yes No If Yes, please provide detailed information:

For All Requests:

1. List the anticipated job duties and expectations; include all major job duties: Advise VR consumers on the effect of employment on benefits received. Maintain knowledge of all public benefits programs in Vermont, including Social Security (SSA), welfare and housing. In counseling sessions with consumers, provides analysis of potential impact of employment and earning on benefits. Provide written analyses to consumers and VR counselors. Assists consumers and counselors in developing effective employment plans considering the impact on the individuals' public benefits. Provide outreach and education on the goals and services of the Work Incentive Program to the general public and to other State departments. Promote informed choices on employment with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) recipients, their families and advocates. Develop collaborative teams from among public agencies serving SSI/SSDI recipients to disseminate information of the Work Incentives Project. Participate in the development and implementation of the Project's research component and ensures that detailed data on each consumer is provided. Perform related duties as required.

Advise VR consumers, Social Security beneficiaries and their families, guardians and payees on the affect of employment on benefits received.

Provide information and/or documentation to general VR staff about consumer eligibility for SSI and SSDI, Food Stamps, Fuel Assistance and health care programs.

Ongoing case management to insure all supports knowledgeable of employment impact on benefits. All supports include other agencies, involved social service providers.

Health Care program expertise to include Medicaid, Medicaid for Working People with Disability program, Medicaid Waiver Programs, VHAP, VPHARM, Dr. Dynasaur, Transitional Medicaid and Katie Beckett. Vt Catamount, QMB/SLMB Buy-In Programs, Medicare Part A, B, C and D. As of 2005, Benefits Counselors have been used as a source of information for Medicare Part D and changes related to eligibility for state assistance for the program.

Inform sister state agencies about inaccurate or incomplete benefit determinations for individual consumers. This insures consumers receive all benefits for which they are entitled.

Identify training needs for area agencies or state agencies and refer information to appropriate personnel for development.

Provide IRS information for eligibility for EITC, impact of Self Employment on benefits. Assist in completing Schedule SE for Medicaid purposes and Social Security credit; use of IRWEs on taxes; earnings and tax implications for SSDI beneficiaries; explains self employment work incentives and how SSAs policy interacts with Schedule C on tax return. Advises on self employment policy and eligibility for Medicaid.

Public Speaking and Outreach: Benefits Counselors provide ongoing presentations and trainings for National Conferences and for local and state conferences and agencies. Outreach to various local and state agencies has included developing materials and curriculum as well as training for mental health and developmental services program and case managers, consumers, school personnel, CORE transition teams, sister agencies, VPIC, NAMI, APSE and TBI state conferences. Advise and assist with unemployment compensation issues and its impact on benefit programs. Interaction with Department of Labor(DOL) involving VR consumers.

Advise and assist consumers to apply for Mandatory Earned Income Disregard for HUD rentals, gain access to other housing incentives for home ownership; connects consumers to other housing assistance through Home Ownership Centers and USDA Rural Development.

Mediate with Social Security for consumer, assist clients in completion of SSAs forms to determine ongoing disability and to facilitate work development for claims representatives. Advocate for clients with SSA regarding waiver requests, eligibility for other SSA benefit programs, such as childhood disability benefits, disabled widows benefits, dependent benefits.

Outreach to youth enrollees by attending IEP meetings in high schools, assisting special educators with Social Security and other benefits for youth and family. Assist youth in navigating through state programs, and help plan for future training, secondary education and employment. Educate youth and family members on the long term effect of employment on benefit programs.

Facilitate and participate in local Voc Rehab office and community meetings, individual treatment team meetings. Attend and participate in Psychiatric/Medical Consult with VR team. Provide education to mental health psychologists and nurse practitioners on benefit programs and work incentives. Participate in individualized treatment team meetings.

Recognized as an expert resource for dealing with high profile cases referred by Agency of Humans Services(AHS) Field Directors, State Senators, Representatives, and the Attorney General's office.

May initiate and assist in creation of Plan to Achieve Self Support(PASS) with VR counselors. Maintain records and advocate for consumer for PASS. PASS trainings to VR counselors, community mental health providers. Ongoing communication to help in facilitate plans and develop amendments as needed. One PASS over a 4 year period can bring in \$30,000-\$40,000 to our community. Assists with changes to other benefit programs to recognize PASS policy and how it relates to other governmental programs.

Respond to an ever increasing number of phone calls and walk-ins for individuals seeking Social Security information and assistance. May assist consumers complete applications for benefit programs.

The nature of the job involves a diverse range of knowledge of disabilities and of program rules. A high degree of independent thinking and flexibility is needed to contribute to the well-being of consumers, and to provide accurate information to all that inquire. Benefits Counselors provide accurate, timely information so that consumers can make informed choices about employment and benefits.

As benefit programs continue to evolve, training needs have increased. Required to attend monthly training sessions, perform independent research.

2. Provide a brief justification/explanation of this request: The Division of Vocational Rehabilitation (DVR) was awarded a grant from the Kessler Foundation to implement an innovative intensive service package for SSI/SSDI beneficiaries. In order to implement the program in the two sites DVR needs the additional benefits counselor capacity

3. If the position will be supervisory, please list the names and titles of all classified employees reporting to this position (this information should be identified on the organizational chart as well). NA

Personnel Administrator's Section:

4. If the requested class title is part of a job series or career ladder, will the position be recruited at different levels? Yes No

5. The name and title of the person who completed this form: James Smith, Budget & Policy Manager

6. Who should be contacted if there are questions about this position (provide name and phone number):
James Smith 802 241-0320

7. How many other positions are allocated to the requested class title in the department: 6

8. Will this change (new position added/change to vacant position) affect other positions within the organization? (For example, will this have an impact on the supervisor's management level designation; will duties be shifted within the unit requiring review of other positions; or are there other issues relevant to the classification process.) No

Attachments:

- Organizational charts are **required** and must indicate where the position reports.
- Class specification (optional).
- For new positions, include copies of the language authorizing the position, or any other information that would help us better understand the program, the need for the position, etc.
- Other supporting documentation such as memos regarding department reorganization, or further explanation regarding the need to reallocate a vacancy (if appropriate).



Personnel Administrator's Signature (required)*

3/5/2020

Date



Supervisor's Signature (required)*

3/5/2020

Date

[Handwritten Signature]

Appointing Authority or Authorized Representative Signature (required)*

9.5.2020

Date

* Note: Attach additional information or comments if appropriate.

Request for Classification Action
New or Vacant Positions
EXISTING Job Class/Title ONLY
Position Description Form C/Notice of Action
For Department of Personnel Use Only

Notice of Action # _____	Date Received (Stamp) _____
Action Taken _____	
New Job Title _____	
Current Class Code _____ New Class Code _____	
Current Pay Grade _____ New Pay Grade _____	
Current Mgt Level _____ B/U _____ OT Cat _____ EEO Cat _____ FLSA _____	
New Mgt Level _____ B/U _____ OT Cat _____ EEO Cat _____ FLSA _____	
Classification Analyst _____ Date _____	Effective Date: _____
Comments _____	Date Processed: _____
Willis Rating/Components: Knowledge & Skills: _____ Mental Demands: _____ Accountability: _____	
Working Conditions: _____ Total: _____	

Position Information:

Incumbent: **Vacant or New Position**

Position Number: Current Job/Class Title:

Agency/Department/Unit: GUC:

Pay Group: Work Station: Zip Code:

Position Type: Permanent Limited Service (end date)

Funding Source: Core Sponsored Partnership. For Partnership positions provide the funding breakdown (% General Fund, % Federal, etc.)

Supervisor's Name, Title and Phone Number:

Check the type of request (new or vacant position) and complete the appropriate section.

New Position(s):

a. **REQUIRED:** Allocation requested: Existing Class Code Existing Job/Class Title:

b. Position authorized by:

- Joint Fiscal Office – JFO # Approval Date:
- Legislature – Provide statutory citation (e.g. Act XX, Section XXX(x), XXXX session)
- Other (explain) -- Provide statutory citation if appropriate.

Vacant Position:

- a. Position Number:
- b. Date position became vacant:
- c. Current Job/Class Code: Current Job/Class Title:
- d. **REQUIRED:** Requested (existing) Job/Class Code: Requested (existing) Job/Class Title:
- e. Are there any other changes to this position; for example: change of supervisor, GUC, work station? Yes No If Yes, please provide detailed information:

For All Requests:

1. List the anticipated job duties and expectations; include all major job duties: **Counseling and casework duties at an advanced professional level for the Division of Vocational Rehabilitation involving provision of services to consumers with disabilities. Duties include work with consumers with the most severe disabilities and oversight of work of lower level counseling staff. Work includes interviews, consultation on case plans, and employment assistance. Work is performed under the supervision of an administrative superior.**
- All employees of the Agency of Human Services perform their respective functions adhering to four key practices: customer service, holistic service, strengths-based relationships and results orientation.**
- **Monitor and record consumers' progress in order to ensure that goals and objectives are met.**
 - **Confer with consumers to discuss their options and goals so that rehabilitation programs and plans for accessing needed services can be developed.**
 - **Prepare and maintain records and case files, including documentation such as consumers' personal and eligibility information, services provided, narratives of consumer contacts, and relevant correspondence.**
 - **Arrange for physical, mental, academic, vocational, and other evaluations to obtain information for assessing consumers' needs and developing rehabilitation plans.**
 - **Analyze information from interviews, educational and medical records, consultation with other professionals, and diagnostic evaluations, in order to assess consumers' abilities, needs, and eligibility for services.**
 - **Develop rehabilitation plans that fit consumers' aptitudes, education levels, physical abilities, and career goals.**
 - **Maintain close contact with consumers during job training and placements, in order to resolve problems and evaluate placement adequacy.**
 - **Develop and maintain relationships with community referral sources such as schools and community groups.**
 - **Locate barriers to consumer employment, such as inaccessible work sites, inflexible schedules, and transportation problems, and work with consumers to develop strategies for overcoming these barriers.**

• Arrange for on-site job coaching or assistive devices such as specially equipped wheelchairs in order to help clients adapt to work or school environments.

2. Provide a brief justification/explanation of this request: The Division of Vocational Rehabilitation (DVR) was awarded a grant from the Kessler Foundation to implement an innovative intensive service package for SSI/SSDI beneficiaries. In order to implement the program in the two sites DVR needs the additional VR counselor II capacity

3. If the position will be supervisory, please list the names and titles of all classified employees reporting to this position (this information should be identified on the organizational chart as well). No

Personnel Administrator's Section:

4. If the requested class title is part of a job series or career ladder, will the position be recruited at different levels? Yes No

5. The name and title of the person who completed this form: James Smith, Budget & Policy Manager

6. Who should be contacted if there are questions about this position (provide name and phone number): James Smith 802 241-0320

7. How many other positions are allocated to the requested class title in the department: 29

8. Will this change (new position added/change to vacant position) affect other positions within the organization? (For example, will this have an impact on the supervisor's management level designation; will duties be shifted within the unit requiring review of other positions; or are there other issues relevant to the classification process.) No

Attachments:

Organizational charts are required and must indicate where the position reports.

Class specification (optional).

For new positions, include copies of the language authorizing the position, or any other information that would help us better understand the program, the need for the position, etc.

Other supporting documentation such as memos regarding department reorganization, or further explanation regarding the need to reallocate a vacancy (if appropriate).

Personnel Administrator's Signature (required)*

3/5/20

Date

Supervisor's Signature (required)*

2/28/20

Date



Appointing Authority or Authorized Representative Signature (required)*



Date

* Note: Attach additional information or comments if appropriate.

**Request for Classification Action
New or Vacant Positions
EXISTING Job Class/Title ONLY
Position Description Form C/Notice of Action
For Department of Personnel Use Only**

Notice of Action # _____		Date Received (Stamp)
Action Taken: _____		
New Job Title _____		
Current Class Code _____	New Class Code _____	
Current Pay Grade _____	New Pay Grade _____	
Current Mgt Level _____ B/U _____ OT Cat. _____ EEO Cat. _____ FLSA _____		
New Mgt Level _____ B/U _____ OT Cat. _____ EEO Cat. _____ FLSA _____		
Classification Analyst _____	Date _____	Effective Date: _____
Comments: _____		Date Processed: _____
Willis Rating/Components:	Knowledge & Skills: _____	Mental Demands: _____
	Working Conditions: _____	Accountability: _____
	Total: _____	

Position Information:

Incumbent: **Vacant or New Position**

Position Number: Current Job/Class Title:

Agency/Department/Unit: GUC:

Pay Group: Work Station: Zip Code:

Position Type: Permanent Limited Service (end date)

Funding Source: Core Sponsored Partnership. For Partnership positions provide the funding breakdown (% General Fund, % Federal, etc.)

Supervisor's Name, Title and Phone Number:

Check the type of request (new or vacant position) and complete the appropriate section.

New Position(s):

a. **REQUIRED:** Allocation requested: Existing Class Code Existing Job/Class Title:

b. Position authorized by:

- Joint Fiscal Office – JFO # Approval Date:
- Legislature – Provide statutory citation (e.g. Act XX, Section XXX(x), XXXX session)
- Other (explain) -- Provide statutory citation if appropriate.

Vacant Position:

- a. Position Number:
- b. Date position became vacant:
- c. Current Job/Class Code: Current Job/Class Title:
- d. REQUIRED: Requested (existing) Job/Class Code: Requested (existing) Job/Class Title:
- e. Are there any other changes to this position; for example: change of supervisor, GUC, work station? Yes No If Yes, please provide detailed information:

For All Requests:

1. List the anticipated job duties and expectations; include all major job duties: Counseling and casework duties at an advanced professional level for the Division of Vocational Rehabilitation involving provision of services to consumers with disabilities. Duties include work with consumers with the most severe disabilities and oversight of work of lower level counseling staff. Work includes interviews, consultation on case plans, and employment assistance. Work is performed under the supervision of an administrative superior.

All employees of the Agency of Human Services perform their respective functions adhering to four key practices: customer service, holistic service, strengths-based relationships and results orientation.

• Monitor and record consumers' progress in order to ensure that goals and objectives are met.

• Confer with consumers to discuss their options and goals so that rehabilitation programs and plans for accessing needed services can be developed.

• Prepare and maintain records and case files, including documentation such as consumers' personal and eligibility information, services provided, narratives of consumer contacts, and relevant correspondence.

• Arrange for physical, mental, academic, vocational, and other evaluations to obtain information for assessing consumers' needs and developing rehabilitation plans.

• Analyze information from interviews, educational and medical records, consultation with other professionals, and diagnostic evaluations, in order to assess consumers' abilities, needs, and eligibility for services.

• Develop rehabilitation plans that fit consumers' aptitudes, education levels, physical abilities, and career goals.

• Maintain close contact with consumers during job training and placements, in order to resolve problems and evaluate placement adequacy.

• Develop and maintain relationships with community referral sources such as schools and community groups.

• Locate barriers to consumer employment, such as inaccessible work sites, inflexible schedules, and transportation problems, and work with consumers to develop strategies for overcoming these barriers.

• Arrange for on-site job coaching or assistive devices such as specially equipped wheelchairs in order to help clients adapt to work or school environments.]

2. Provide a brief justification/explanation of this request: [The Division of Vocational Rehabilitation (DVR) was awarded a grant from the Kessler Foundation to implement an innovative intensive service package for SSI/SSDI beneficiaries. In order to implement the program in the two sites DVR needs the additional VR counselor II capacity]

3. If the position will be supervisory, please list the names and titles of all classified employees reporting to this position (this information should be identified on the organizational chart as well). [No]

Personnel Administrator's Section:

4. If the requested class title is part of a job series or career ladder, will the position be recruited at different levels? Yes No

5. The name and title of the person who completed this form: [James Smith, Budget & Policy Manager]

6. Who should be contacted if there are questions about this position (provide name and phone number): [James Smith 802 241-0320]

7. How many other positions are allocated to the requested class title in the department: [29]

8. Will this change (new position added/change to vacant position) affect other positions within the organization? (For example, will this have an impact on the supervisor's management level designation; will duties be shifted within the unit requiring review of other positions; or are there other issues relevant to the classification process.) [No]

Attachments:

- Organizational charts are required and must indicate where the position reports.
- Class specification (optional).
- For new positions, include copies of the language authorizing the position, or any other information that would help us better understand the program, the need for the position, etc.
- Other supporting documentation such as memos regarding department reorganization, or further explanation regarding the need to reallocate a vacancy (if appropriate).



Personnel Administrator's Signature (required)*

3/5/20

Date



Supervisor's Signature (required)*

3/2/2020

Date

[Handwritten Signature]

Appointing Authority or Authorized Representative Signature (required)*

3-4-2020

Date

* Note: Attach additional information or comments if appropriate.