

## VR and CAP Moving Forward Together: Effective Collaboration Strategies Key Points from the June 23, 2021, Webinar hosted by NDRN and CSAVR

### Introduction

In 2021, the Council of State Administrators of Vocational Rehabilitation (CSAVR) and the National Disability Rights Network (NDRN) surveyed their members about challenges and opportunities in the relationships between State Vocational Rehabilitation (VR) agencies and Client Assistance Programs (CAPs) in their States. The resulting feedback revealed that VR agencies and CAPs in several States had developed strong relationships founded on the shared goal of improving VR services and outcomes for individuals with disabilities.

On June 23, 2021, in cooperation with the Rehabilitation Services Administration, CSAVR and NDRN hosted a webinar to highlight strategies and approaches that contribute to strong collaborative relationships between VR agencies and CAPs. The webinar featured a panel of CAP and VR agency leadership from Michigan, Minnesota, and Rhode Island, including:

- Chelsea Chamberlin, Disability Rights Michigan
- Elham Jahshan, Disability Rights Michigan
- Catherine Sansonetti, Disability Rights Rhode Island
- William Robinson, Michigan Bureau of Services for Blind Persons
- Anne Robertson, Mid-Minnesota Legal Aid/Minnesota Disability Law Center
- Tina Fullerton, MDLEO- Michigan Rehabilitation Services
- Natasha Jerde, Minnesota State Services for the Blind
- Dee Torgerson, Minnesota VR Services, Dept. of Employment and Economic Development
- Joseph Murphy, Rhode Island Office of Rehabilitation Services - Vocational Rehabilitation
- Sigrid Adams, Michigan Rehabilitation Services, Employment & Training Division
- Ronald Racine, Rhode Island, Department of Human Services-Office of Rehabilitation Services
- Lisa Kisiel, Michigan Bureau of Services for Blind Persons

We encourage you to access the webinar and related resources <https://www.ndrn.org/resource/cap-vr-moving-forward-together-collaboration-strategies>. For your convenience, we have summarized below the strategies and approaches shared by the panelists as well as the attendees.

### **Background:**

Collaborative relationships between VR agencies and CAPs can help improve competitive, integrated employment outcomes and other services and benefits for individuals with disabilities under the Rehabilitation Act. Positive relationships develop through small steps that build trust and reveal the potential for mutually beneficial collaboration. So, how did the collaborative relationships develop in the participating States?

- There has been a concerted effort on the part of both agencies to change that relationship over the past 20 years.
- CAP and VR deliver consistent messaging to staff that a disagreement or opposite sides of an individual case do not reflect on individual staff members. Also, messaging within the CAP agency (which, in some states, may be within a Protection and Advocacy--P&A--office) to approach the matter respectfully and with an understanding that our goal is to try to resolve disputes informally first.
- We have been able to change the culture. In the past, VR staff did not want to involve the CAP because it reflected badly on one's abilities or position. Now it is seen as a positive, not punitive, way to informally resolve disputes.
- Value each other's roles in serving the customer. Communication, trust and respect form the foundation for our relationship today
- An understanding of the VR system is a must.

- Newer staff seem more willing to engage CAP, which may be reflective of this messaging.

## **Collaborative Strategies and Approaches**

### **Theme 1: Relationship-Building**

#### **How did the States build and maintain positive relationships at leadership and counselor levels?**

##### **1) Formal meetings**

- CAP invited to participate in District & Division meetings and in bureau teams, including the Diversity Equity and Inclusion Team, Consumer Handbook Team, Transition Team , etc. (The consumer handbook is the handbook for the VR customer – from application to closure, what to expect).
- Training and open discussion with counselors.
- Regional Office and field service delivery team meetings.
- Quarterly leadership meetings to discuss trends/issues, successes and problems
- CAP presentations to VR staff and VR staff presentations to CAP staff provide opportunities to connect with supervisors and staff.
- CAP participation in State Rehabilitation Council (SRC) policy committees.
- CAP participation in Diversity Advisory Team steering committee.

##### **2) Informal meetings**

- Bi-monthly “Coffee with CAP” meetings.
- Opportunities for general VR agency and Blind VR staff to build positive working relationships with CAP staff at presentations or other informal meetings outside of cases or conflicts.
- CAP staff visits VR offices and participate in other joint activities outside of resolving client concerns.
- Introducing CAP to new VR staff early on – and vice versa – has proven to be very beneficial in building positive relationships CAP Orientations at VR offices (in person or virtually) so CAP professionals can meet VR staff and vice versa.

##### **3) Cross-training**

- Presentations at CAP and VR new employee orientations explaining the roles of CAP and VR, their purposes, processes, and how they can work together to assist consumers. Includes comments from CAP advocates/attorneys, VR counselors, and clients about their positive experiences working together.
- CAP presentations to VR staff on CAP and Supported Decision Making.
- VR organize trainings with the CAPs to educate counselors on CAP's role and services.
- Training regarding CAP permitted activities, types of advocacy, scope of advocacy, and collaboration on resolution, etc.
- CAP explains its perspective about the law and about VR policies, including its stand on particular policies on which the VR agencies and CAPs may agree or disagree (balance of both positive and negative feedback).
- VR agency explains what it is working on, describes what data it is collecting (e.g., Comprehensive Needs Assessment or other local data) and how it is responding to the data.
- Orientation for new hires to be part of the onboarding process.

## **Theme 2: Cooperation on individual cases**

### **How do the collaborative relationships translate into resolving individual cases referred to CAP? How do the States deal with disagreements?**

#### **1) Consultation and Accountability**

- There are always going to be disagreements. If you start with trust and respect, then you can agree to disagree and still create a positive client outcome.
- Difficult cases are discussed during quarterly consultations between CAP team and Field Services Division management team.
- VR agency conducts its own investigation of complaints, rectifies as appropriate, and shares findings with the CAP.
- VR staff openness and willingness to connect with CAP for advice.
- The VR client and their needs are the primary focus. See things through the eyes of the customer, without reactive or defensive thinking. It is helpful to have someone outside the situation assess from the “balcony” rather than the “dance floor.”
- CAP routinely contacts the counselor, given that the manager/supervisor may not be aware of the issue.
- Managers encouraged to work with CAP—from leadership to counselor level.

## 2) Transparency

- Clients educated on their right to engage the CAP regarding complaints or concerns at application, plan development, plan amendment, and exit.
- Clients assured that they should not fear retaliation or be chastised by the counselor because they contacted CAP.
- Video for clients and VR staff on the importance of informed choice and self-advocacy and the CAP's positive role in the client's advocacy for themselves.
- Open-door policy that encourages CAP staff to contact the VR agency to share the CAP's concerns with VR staff. The VR agency acknowledges when the agency needs to adjust its response to situations and concerns.
- Staff ensures that the release of information form is signed by clients for VR agency professionals to discuss CAP complaints.
- Remind VR of its obligation to provide written notice of denials, including CAP information in closure letters and other client information as required and also beyond what is required.
- Closure letters from the CAP staff are placed in the case file to document the conclusion of the CAP case.
- CAP notifies VR when a client secures CAP representation (or when the CAP ceases to represent a client) and copies the VR agency on its closure letters to clients.
- VR and CAP agree upon a mutual form for releasing records specific to VR.
- Ensure that all customers know how to reach CAP at any time during the VR process.
- Short video that discusses possible situations/decision points in the VR process where CAP involvement would be beneficial and shows what CAP involvement would entail.

### **Theme 3: Coordination on statewide policies and direction**

#### **How do collaborative relationships translate into statewide initiatives to the improve VR services and outcomes?**

##### **1) Regular Information Sharing**

- In-person meetings between the Director and Deputy Director and CAP representatives several times each year to share what is happening in our respective programs, highlight upcoming things, and discuss potential problem areas.
- Quarterly consultations between CAP team and Field Services Division management team – including the Division Director – to discuss questions, concerns, and difficult cases.
- CAP participation in the Interagency Transition Team and Association on Higher Education and Disability regarding transition and pre-employment transition services.
- CAP sits on the Tribal VR council, together with the VR agency liaison (a counselor). CAP maintains contact with the Tribal VR, including having periodic cultural competence trainings for our staff.
- VR agency invited the CAP director to the RSA monitoring activities of the State VR system (Section 107 Monitoring).

##### **2) Collaboration on setting statewide VR policies and direction**

- Active CAP participation on and leadership of the SRC, including serving on the SRC policy committee, or as SRC chair.
- CAP input into the Unified and Combined State Plan.
- VR liaison training on key WIOA performance measures and other key WIOA topics by VR and/or CAP staff.
- CAP staff invited to participate and critique new policies and revisions to existing policies.
- CAP presentations to the SRC at least once a year.
- Policy Cadre meetings – coordination with CAP and CAP feedback on policy development.
  - Leveraging of resources on the SRC to improve VR agency services in particular areas

#### **Wrap-up: Underlying Philosophy**

##### **What are the key principles for successful relationship-building and collaboration between VR agencies and CAPs on behalf of individuals with disabilities?**

- Trying to see things through the eyes of the customer, without reactive or defensive thinking.

- Guidance for everybody on the benefits of good communication and cooperation in the VR/CAP process, including the message that counselors need not take CAP involvement personally as they work with clients toward their employment goals (shared goals).
- Shared values of customer-focus, trust, respect, problem-solving, and communication are necessary when working to assist the client.
- Solution-focused approaches. Motivational Interviewing (reflection, empathy, and equipoise) and effective listening skills assist in attaining outcomes that are fair to all parties.
- The key principle is to recognize first that the relationship requires work to get to where you want the relationship to be, to maintain it, and to improve it on an ongoing basis.
- Successful collaboration is founded on the belief that both agencies are there to serve the client and that we owe it to our clients to improve the systems and flaws we each see. We may not always see the same flaws at the same time, yet that is where continual dialogue can help State VR agencies and CAPs find common ground, where possible, and move forward in promoting better services and outcomes for individuals with disabilities.