

UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES
REHABILITATION SERVICES ADMINISTRATION
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INFORMATION MEMORANDUM
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ADDRESSEES: STATE VOCATIONAL REHABILITATION AGENCIES (GENERAL)
STATE VOCATIONAL REHABILITATION AGENCIES (BLIND)
REGIONAL REHABILITATION CONTINUING EDUCATION
PROGRAMS
RSA REHABILITATION COUNSELING LONG-TERM TRAINING
PROJECTS
STATE REHABILITATION COUNCILS
CLIENT ASSISTANCE PROGRAMS
PROTECTION & ADVOCACY OF INDIVIDUAL RIGHTS
PROGRAMS
AMERICAN INDIAN VOCATIONAL REHABILITATION
PROGRAMS
CONSUMER ADVOCACY ORGANIZATIONS
RSA SENIOR MANAGEMENT TEAM

SUBJECT: RSA Procedures for the Conduct of the Institute on Rehabilitation Issues

CONTENT: This RSA Information Memorandum transmits the revised RSA Procedures for the Conduct of the Institute on Rehabilitation Issues (IRI), and supercedes RSA-IM-96-17, dated August 16, 1996, on the same subject. The revised procedures contain: a summary of the changes, a historical overview of the IRI, the IRI organizational structure and process; and plans for improving the timeliness, dissemination, marketing and utilization of the IRI publications. For fifty-five years, the IRI has been a national forum for discussing the important challenges facing the state vocational rehabilitation (VR) services program. It is the longest running event of its kind in the rehabilitation field, and one of the longest in the human services profession. The IRI has enjoyed a long and fruitful history of cooperation and affiliation among state VR agencies, RSA, universities and community-based rehabilitation programs. The IRI publications are widely used by VR counselors and supervisors, human resource development (HRD) specialists, community-based rehabilitation service providers, administrators, researchers, educators and policy analysts.

Since the original IRI procedures were transmitted, significant progress has been made in revitalizing the IRI and in generating interest in the publications. However, separate processes for suggesting topics and nominating study group chairpersons and members, and delays in reviewing, publishing, and disseminating the documents necessitate further refinements to improve the efficiency and effectiveness of the procedures, and the usefulness of the publications.

The following five priorities are reflected in the revised IRI procedures:

- Streamlined management. RSA is streamlining the management of the IRI so that the study topics and study group members and chairpersons may be selected in a timely manner, and to expedite the development, review and dissemination of the IRI publications. These processes have become too complex over the past several years and this has resulted in extensive delays throughout the process.
- Improved accountability. RSA is restoring accountability to the process by ascribing responsibility for the completion of various tasks to specific partners, and through increased involvement of the RSA Training Division and RSA Regional Offices, the Regional Rehabilitation Continuing Education Programs (RRCEP), and state VR agency HRD staff.
- Improved marketing, dissemination, and utilization of the IRI publications. Through the broad-based support of the members of the IRI Planning Committee, RSA will increase the use of technology in reaching the audience for the IRI publications. Each document will be posted on the Internet. RSA will be providing additional incentives to rehabilitation professionals to complete training based on the IRI publications by providing continuing education credits, and through other mechanisms such as enabling them to complete the training through the Internet, in face-to-face classrooms, and through the completion of modules contained in the IRI publication.
- Increased consumer empowerment. The IRI partnership will be strengthened to include VR program consumers, and members of organizations representing individuals with disabilities, as equal members of the IRI Planning Committee.
- Reduction from three to two study groups held each year. Due to continuing budgetary constraints in the RSA Training Program, RSA is reducing the number of IRI university coordinators to the University of Arkansas and The George Washington University.

RSA is also making the following changes to the procedures that reflect other longstanding concerns: rename the “prime” study groups, the “primary” study groups; and, accord the primary study group chairpersons and members the title of “IRI Scholar,” a title that is consistent with their knowledge and expertise in the subject area under study.

Historical Overview.

The IRI originated as the Guidance, Training and Placement Workshop(GTP) from 1947-1962. The purpose for the GTP was to "give technical assistance to operating or line personnel in the areas of guidance, training and placement." The GTP was renamed the Institute on Rehabilitation Services (IRS) in 1963 and the emphasis became focused on inservice training of VR personnel, particularly in areas emphasized in Federal rehabilitation legislation and program planning. Universities became integrally involved in the process, through the sponsorship of the study groups and as a mechanism for reviewing, assembling, printing and distributing the publications.

In 1974, RSA renamed the IRS the IRI and shifted financial support for the activity to the RSA administered rehabilitation research program. In 1978, funding moved to the National Institute on Handicapped Research, now the National Institute on Disability and Rehabilitation Research (NIDRR), who continued sole support through its Research and Training Center (RTC) program.

In 1996, RSA assumed complete financial support for the IRI. Procedures were developed to institutionalize this change in the locus of control from the university coordinators to RSA. To enable increased participation of RSA staff, it was decided that all IRI study group meetings would be held in a city in which an RSA Regional Office is located. Furthermore, the National IRI Forum was to be held annually in Washington, DC, to emphasize both the importance of the activity and the national character of the Public VR program, and to enable RSA central office staff the opportunity to participate in the Forum.

Purposes for the IRI.

The purposes for the IRI have been fairly consistent throughout its history:

- Identify and discuss current issues of importance to the Public rehabilitation program.
- Develop materials that can be used by state VR agencies and others concerned about staff development in rehabilitation.
- Publish and disseminate the materials widely to persons who provide rehabilitation services to individuals with disabilities.

Relevance of the IRI to Contemporary Rehabilitation.

The IRI exemplifies the State-Federal public partnership that has served as the foundation for the VR program since its inception. The IRI publications are widely used by VR counselors and supervisors, human resource development (HRD) specialists, consumers of VR services and their families, community-based rehabilitation service providers, administrators, researchers, educators and policy analysts.

Improving the skills of personnel in the VR program through effective training is a basic function of RSA's RRCEPs, and is an integral part of one aspect of the program mission, to provide training and technical assistance to state VR agencies on the problems facing rehabilitation service providers, and to disseminate and promote the utilization of knowledge resulting from current research. The study findings on a specific topic are quickly transposed into useful training materials and publications.

The IRI is important to rehabilitation professionals for at least two reasons, its products and its process. The counselor, educator, administrator, researcher and trainer each contributes valuable expertise and insight to both the product and the process. Each also brings a unique geographical as well as professional orientation. This interchange of theoretical, legislative, programmatic, and pragmatic perspectives results in publications that combine an interpretation of regulations, innovative methodologies, theoretical considerations and practical applications.

IRI Organizational Structure

IRI Planning Committee.

The IRI is guided by the Planning Committee. The Planning Committee provides direction to the university coordinators who manage the primary study groups. The Planning Committee is also responsible for completing the following tasks:

- Publicize the IRI and solicit topics for study, primary study group chairpersons and members, and participants for the National IRI Forum from: the Council of State Administrators of Vocational Rehabilitation (CSAVR); other state VR agencies, including agencies serving the blind; consumer organizations; and, other stakeholder groups.
- Discuss topics and recommend three topics for study. The RSA Commissioner, in consultation with the IRI Planning Committee

members, will select two topics. The RSA Commissioner will assign each topic to a university primary study group coordinator.

- Advise the university primary study group coordinators on the marketing, dissemination and utilization of the IRI publications.
- Recommend strategies for including IRI publications as part of: state VR agency inservice training; RRCEP training activities; and the curriculum of the Rehabilitation Counselor Long-Term Training Programs.

IRI Planning Committee Membership.

The IRI Planning Committee is composed of the following representatives selected by the RSA Commissioner:

- General Chair, selected from the state VR agency members of the IRI Planning Committee, with input from: CSAVR, other state VR agencies, including agencies serving the blind, consumer organizations, and, other stakeholder groups.
- RSA Commissioner, or his/her designee (also serves as overall IRI Coordinator).
- Two additional representatives from RSA.
- Two persons previously served by the state VR program, and one person either representing a community-based rehabilitation program, an organization representing persons with disabilities, or a family member of a person with disabilities.
- Two additional representatives from the state VR agencies (state VR agency directors or his/her designee), for a total of three representatives including the General Chair.
- Two IRI primary study group university coordinators.
- One representative from a Rehabilitation Counselor Long-Term Training Program.

The Planning Committee meets once each year during the National IRI Forum to conduct the managerial business of the IRI, including topic selection for the following IRI cycle. Sub-committee meetings may be arranged on particular issues, as necessary.

IRI Process

Topic Selection.

In January, The IRI Planning Committee solicits topics for study via an RSA IM that is widely circulated to RSA grantees, CSAVR, other state VR agencies, including agencies serving the blind, consumer organizations, and other stakeholders. The topics are provided to the IRI Planning Committee for review and discussion. Three or four topics are assessed to be most worthy of further consideration at the annual IRI Planning Committee meeting. The selection criteria used by the IRI Planning Committee are:

- The topic is currently one of concern to a large number of state VR agencies.
- It is a topic that can be completed within a year.
- There are recognized experts and/or a body of literature that will be available to the primary study group.

Selection of Primary Study Group Chairpersons and Members.

Following the selection of the two topics for study during the next IRI cycle, RSA again solicits through an RSA IM, chairpersons and members to serve on each of the primary study groups. Primary study group chairpersons and members are to meet the following criteria: knowledgeable and recognized experts on the topic being developed; able to formulate written ideas; and, willing and able to make a substantial commitment of time and energy to the IRI process.

The RSA IRI Coordinator and other RSA staff evaluate the nominations and submit to the RSA Commissioner a prioritized listing of all nominees, the majority of whom are state VR agency representatives, but also including other individuals who are recognized authorities on the issues under study and/or represent important consumer perspectives.

Based on the proposed slate of names for each primary study group, the RSA Commissioner, with input from CSAVR, other state VR agencies including agencies serving the blind, consumer organizations and other stakeholders, selects the primary study group chairpersons and members. The chairperson will be a state VR agency director, or his/her designee, who has demonstrated leadership qualities, good writing and editorial skills and has served on previous IRI primary study groups. The RSA Commissioner appoints at least one RSA representative to participate on each primary study group.

The members of the primary study groups make a commitment to: attend three meetings (travel expenses paid by the university coordinators, except for the RSA staff member and any other Federal employees), and prepare materials between meetings of the group. The members' employers provide release time and salary for staff members to serve on the primary study groups. No honorarium is paid as part of the IRI process. In addition, the primary study groups will continue to be held in cities that have an RSA Regional Office, to minimize as much as possible the expenses for the participation by the RSA employee(s).

Primary Study Group Meetings.

The first primary study group meeting is devoted to a discussion of the topic and all of the issues surrounding it from each member's perspective. When the issues have been discussed, they are organized into chapters for the draft publication. These issues are then used to outline potential chapters and to make writing assignments for each member of the primary study group. The members return home to do the actual writing for their assigned portion of the outline.

Approximately two to three months later, the primary study group reconvenes for the second meeting to review the draft documents and to further discuss the topic. At the end of this session, the written materials are reorganized, chapters may be cut and pasted together and new outlines are developed for missing materials. At the second meeting, chapters may be reassigned to other members of the primary study group to provide an additional perspective or to further elaborate specific issues. They will then rewrite that section or chapter, using the first draft as a starting point. This second effort is sent to the primary study group university coordinator for distribution to the primary study group members and persons who will attend the National IRI Forum.

National IRI Forum.

Approximately three months prior to the National IRI Forum, the date, meeting site, and topics developed over the previous year are announced to potentially interested individuals via an RSA IM. State VR agencies are requested to send representatives with knowledge and interest in the topics, with a special emphasis on the participation of HRD and Field Service personnel. Participants at the National IRI Forum choose one of the topics that will be presented and become part of that topic's expanded study group, named the full study group. Each member is mailed the primary study group's draft document at least two weeks prior to the Forum to review, critique and develop recommendations for improvement in preparation for the meeting. At the Forum, the primary study group chairperson and members describe the development of the topic and review the draft document. The full study group critiques the material for accuracy, comprehensiveness of coverage, reference to state VR agency

practices, inclusion of appropriate consumer references and concerns, and other issues. Critical comments, both negative and positive, are recorded for consideration by the editorial committee.

Revision and Report Development.

At the completion of the National IRI Forum, a small editorial committee made up of the primary study group chairperson, several members of the primary study group (one of whom may serve as the following year's chairperson), and the university coordinator, edit the document. The university coordinator subsequently conducts an additional edit of the revised document and sends it to all members of the primary study group to ensure accuracy and completeness. Primary study group members are responsible for sharing the draft with their employers, trade organizations and any other groups that they think relevant in order to obtain additional feedback.

Review of Publication Prior to Printing.

Upon completion of the final edits, the document is provided to RSA for a final review. The IRI university coordinators are responsible for providing RSA with a final draft document for review within ninety days of the National IRI Forum. RSA will provide feedback to the primary study group coordinators within thirty days, in order to improve the documents and to prevent the dissemination of information that is inaccurate. While some slippage of the dates is likely to occur, RSA expects that the final documents will be published no later than the November following the National IRI Forum.

Dissemination.

Each IRI document is placed on the university coordinator's web site in an accessible and downloadable format with linkages to the RSA home page. Approximately 3,500 hard copies of each IRI publication are distributed free of charge via RSA IM to RSA grantees and other individuals and groups with an interest in the topic, including but not limited to: RSA; state VR agency directors and HRD staff; State Rehabilitation Councils; RRCEPs; Rehabilitation Counselor Long-Term Training Programs; NIDRR; National Center for the Dissemination of Disability Research (NCDDR); and National Rehabilitation Information Center (NARIC). The mailing list will be maintained by RSA and expanded according to the topics selected in order to accommodate other interested individuals.

Two years after the date of publication, all remaining copies are to be sent to the National Clearing House on Rehabilitation Training Materials (NCHRTM) for further distribution and to maintain a central source for all IRI publications. The NCHRTM will provide the publications at minimal cost to interested persons, thus ending years of confusion as to where the

IRI publications may be obtained, and creating a central location for these important publications.

Utilization of the IRI Publications.

While dissemination of the IRI publications is important, utilization is critical to the application of the information to useful practice. The two RRCEPs responsible for coordinating IRI primary study groups will develop training materials to be included as a part of each IRI publication. The materials will enable interested individuals to obtain continuing education (CE) credits, with a special emphasis in obtaining credits applicable to the Commission on Rehabilitation Counselor Certification (CRCC) Certified Rehabilitation Counselor (CRC) requirements. This stipulation is in recognition of the critical role played by the rehabilitation counselor in the VR process.

The IRI university coordinators will develop and maintain the capacity for interested VR counselors to obtain continuing education credits through the completion of internet-based distance education and/or satellite broadcasts. They will also institute methods for VR counselors to complete the necessary materials and return them through regular mail. This is not to minimize the arrangement of traditional face-to-face training opportunities activities, which should also be made available, when appropriate.

The RSA RRCEPs will incorporate the IRI training into their program activities. RSA Regional Office training staff will meet with the RRCEP staff and state VR agency HRD specialists and Field Service personnel, in order to provide leadership in implementing strategies to deliver the training, to determine the need for additional resources, and to assess the effectiveness of the training. Pertinent issues and concerns will be brought to the attention of the RSA Director of Training and the RSA IRI Coordinator.

Ongoing Evaluation

The purpose for evaluating the IRI is not to ensure that it is adhering to the procedures, but rather whether or not it is having a significant impact in improving the level of knowledge and skills of rehabilitation professionals. Evaluations will be routinely conducted on the efficiency and effectiveness of the IRI primary study groups, the National IRI Forum, the IRI publications and the training activities based on the publications. The IRI Planning Committee will provide guidance on developing appropriate evaluation tools. The results of these evaluations will be provided to the RSA IRI Coordinator, who will share them with the IRI Planning Committee. The evaluation results will be used to improve the IRI marketing, dissemination and utilization activities. RSA

plans to conduct an evaluation of the effectiveness of the IRI during FY 2005.

Marketing.

This RSA IM sets forth the initial activities to improve the marketing of the IRI. The IRI has name recognition and a logo that will be used on all IRI announcements, publications, etc. Immediately following the National IRI Forum, the university coordinators will develop abstracts related to the content of the two publications to be distributed to the potential audience. The abstracts will be placed in the American Rehabilitation magazine and submitted to other rehabilitation journals, disability-related listservs, and rehabilitation professional membership organizations. The abstracts will also form the basis for press releases to be provided to pertinent magazines, newspapers, radio and television stations, and web sites in order to generate interest in the publications and the National IRI Forum.

Joanne M. Wilson
Commissioner

CC: Council of State Administrators of Vocational Rehabilitation
National Organization of Rehabilitation Partners