

International Association of Rehabilitation Professionals

The Experts' Express

Upcoming Events

IARP Webinar Series Social Security Vocational **Expert Testimony and** Psychiatric Impairments Aug. 3, 2011

2011 International Symposium on Life Care Planning Scottsdale, AZ Sept 17-18, 2011

IARP 2011 Forensic Conference Las Vegas, NV Nov. 3-5, 2011

2012 IARP International Conference San Juan, Puerto Rico Oct. 25-27, 2012

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Message from IARP's Outgoing President, Rodney Isom

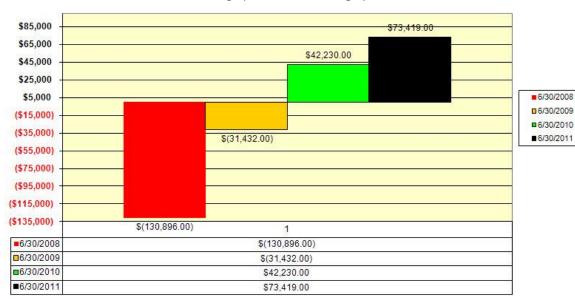
Last December I wrote about the association as 2010 drew to a close. Now as I have stepped down as IARP president, I want to share some observations about the last three years. During this period of time I have served as your president elect and president. I have seen the beginning of a great transformation for the association and I want to muse a bit about the challenges that we faced and how we fared.



Financial Collapse Averted

A series of events had led to IARP's weakened financial base at fiscal year-end June 30, 2008. We have reported frequently about our finances. For three years the finance committee, board of directors, section and chapter staff took draconian measures: we cut expenses at all levels, cancelled in-person annual conferences, and began the rebuilding. I am proud to report that the bottom line has made a complete recovery.

IARP Net Assets (Net worth) Balance June 30, 2008 to June 30, 2011



We also have greatly expanded the oversight responsibilities of the IARP Finance Committee relating to the financial practices and condition of the association finances to include IARP's financial policies and procedures. We also expect the committee to keep us informed of IARP's financial condition, implementing requirements for reserve funds, and their access. The committee also advises the board on uses of funds and policies and procedures required to achieve IARP's mission.

(Continued on page 2)

■ 6/30/2011



Observations from IARP's Outgoing President

(Continued from Page 1)

Thanks to the work of Barbara Byers of the finance committee, chaired by Patrick Decoteau, we now have a much needed new policy for the association's operating reserve fund.

Membership Stabilized

In August 2007 membership peaked at 2554. After that summer, membership began a slow, but steady decline as we reduced services to cut the financial losses and were not able to invest in new programs to attract members and retain existing members. By May 2009 we reached our low point of 2290. We have leveled out and have begun to grow again. However, as Ann Wallace, one of our stalwart directors points out, our uptick is far better than many other professional societies. Two of the major contributing factors in our turnaround are the new SSVE section and the improved retention rate. We have a long way to go, but I see signs of progress. Dennis Funk has led membership for the last several years as well as chairing the IARP Council of Chapter Presidents.

I also am very encouraged by the plans to develop more tools for chapters to use in building their membership. The governance chapter task force and the ad hoc task force on membership/marketing have made excellent recommendations for membership building and marketing.

Strategic Planning and Governance

One of the most stressful issues that we faced during the summer of 2010 was financial fraud in one of our chapters. I reported to you extensively about the steps we took to recover the funds from the chapter officer involved. With the benefit of hindsight, I believe it was a wake-up call. The theft called into question a great deal about our governance from the top most levels... the IARP board, sections, and chapters. Within 90 days of the financial fraud, we convened a special board committee to address the viability of the organization and its resilience after this crisis. We are particularly indebted to the special board committee, headed by Patrick Decoteau, for the recommendations that it made and the strong endorsement by the IARP Board of Directors.

Legal Audit

Our governance thrust also resulted in our selecting a new legal counsel, John Peterson, from the highly regarded Chicago firm Howe & Hutton, which focuses on representing associations and professional societies. One of John's first suggestions was a total legal review of the current status of bylaws, policies and procedures. The board is now acting upon many of his suggestions.

Education

During the last two years we have strengthened our educational products by introducing two nationally sponsored Case Management/Disability Management conferences. Both were successful in spite of their pioneer status (and a knockout snow storm in February 2010 in the East). The flagship IARP Forensic Conference continued to earn high marks for 2009 and 2010. Advanced registration for the Las Vegas forensic conference in November 2011 is running far ahead of registration for 2010...another sign of strength for the association.

We have an equally important major education thrust led by the Life Care Planners Section (IALCP). The section leaders spearhead program development for the annual International Symposium of Life Care Planning. They make a major contribution to the symposium and the fall event traditionally draws over 50% of its attendance from IARP members.

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Observations from IARP's Outgoing President

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Education

We are heavily invested in the success of these programs and our next two in-person IARP board meetings will be held in conjunction with the symposium in September in Scottsdale and the forensic conference in Las Vegas in November.

In June IARP Canada and the Life Care Planners Section had a successful Summit. More details about the event appear on page 6.

Webinars Expand Opportunities

The webinar program is progressing well with the schedule set through the end of 2011. Webinars are the responsibility of Deb Holmes, chair of the IARP Education Committee, and Pat Sistler, IARP director of education, at headquarters. In addition to suggestions from section representatives and committee members, we have had great success with encore presentations of a few of the popular sessions from both the CM/DM and Forensic Conferences. March, April (2 webinars) and May programs were well received. We continue to attract a substantial non-member audience for the webinars. The names of all non-member attendees are being added to the prospective member database for follow-up.

Occupational Information Development Advisory Panel (OIDAP)

We continue to post notices of upcoming meetings and activities of OIDAP on the IARP website, in e-mail blasts, and write articles for this newsletter. We are indebted to IARP board members, Lynne Tracy, Angie Heitzman, and Amy Vercillo for their diligence in tracking and reporting on every development at OIDAP. IARP is the only organization that has been steadfast in its attention to OIDAP.

Disability Management Section

Norm Hursh chairs this section. He has introduced a number of new initiatives. Let me highlight several of them.

Corporate Membership Incentives

Norm reports that initial discussions have taken place to explore better utilization of the IARP corporate membership incentives to attract more members. Present marketing material to describe the incentive has been reviewed. DM Board members have been charged with identifying two potential corporate entities to explore ways to maximize this initiative.

RTWMatters

The DM board has been considering an affiliation agreement with RTWMatters.com as a member benefit. This agreement would involve both DM and CM section members. A focus group vetted the website and an announcement about the affiliation agreement should be ready soon. We are indebted to Mary Harris, one of the DM board members, for bringing this opportunity to IARP.

DM Engagement in Canada

Canada has a strong disability management foundation across most provinces. Now that there is a formal IARP chapter in Canada, the DM section will explore activity to build membership and provide services that are identified as important to Canadian DM professionals. Dr. Michel Lacerte and Susan Maxner will take leads in this activity. Michel also collaborated to organize the Life Care Planning summit in Toronto last month.

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Observations from IARP's Outgoing President

(Continued from Page 3)

Standard Compliance Review Board (SCRB)

The seven person elected members of this board are responsible for monitoring and adjudicating the compliance of our members with the association's standards and code of ethics. As a part of our study of the governance of the association, Deb Veatch, SCRB chair, and her committee will meet this fall to review the role and function of the board.

Life Care Planning Section

In addition to the major role in establishing the program for the annual symposium, section leaders focus on the important role of the Journal of Life Care Planning. Susan Riddick Grisham is the section's representative to the IARP Board of Directors. Both Susan and section chair, Elizabeth Davis, agree that the journal is consistently rated as the top benefit offered to section members. Current focus is the orientation of the new journal editor. The journal is published quarterly. Roger Weed, life member of IARP and former president, Cloie Johnson, past chair of the section, and Steven Yuhas, veteran IARP member and section chair-elect were directly involved in the success of the summit in Toronto last month.

Forensic Section

Ann Savage Veh stood in for Angie Heitzman, the section's representative to the IARP Board of Directors, who was unable to attend our June board meeting. Ann reported on the section's plans for a day of service prior to the IARP Forensic Conference in Las Vegas. "Project Ezra" is an employment workshop to address the area's high unemployment rate. The forensic section adopted a paperless system for submission and review of conference proposals which was highly successful. I salute Angie for being a tireless worker on a number of projects in the last six months. She's a real pro.

SSVE Section

The SSVE section has an eight- member executive board and 18 region reps as well as a member on each membership, finance and election committees and two members on IARP 2012 International Conference Committee. Amy Vercillo continues to be an impressive leader of the section and is the section's representaive to the IARP board.

In the last year 68 new section members have come on board, The SSVE section has been very active in maintaining contact with SSA regarding the current Blanket Purchase Agreement (BPA) fee schedule and terms. We continue to work with SSA to negotiate a fair contract. The SSVE section was able to resolve all outstanding ratification invoices for members. The IARP-SSVE Compensation and Availability Survey was requested and used by the SSA Office of Inspector General in their audit of the program. The section continues its membership campaign to recruit new members and government relation fundraising campaign.

Case Management Section

Kathy Trumm, section chair, and her board have completed the section's new strategic plan. Each section has its own plan. She plans to have the entire section board meet in Scottsdale prior to the IARP Board of Directors meeting in September. The section is evaluating the RTWMatters website in conjunction with the Disability Management section as reported above. The section is aggressively building its prospective member lists. By the way, if you have not had the opportunity to go to RTWMatters website, do so, what a great resource for our members, not just people in the case management section.

(Continued on Page 5)



Observations from IARP's Outgoing President

(Continued from Page 4)

International

Thanks to the efforts of Alan Bruce, the new chapter president in Dublin, we are seeing a rebirth of IARP Ireland. Three new members joined in the last several weeks and Alan reports more are in the pipeline. We also see promising opportunities for growth in Puerto Rico, particularly with the IARP 2012 International Conference in San Juan. I hope you read the whole story about Ann Wallace and Lynne Tracy and their committee's plans for the San Juan conference in the last issue of this newsletter.

Summary

We have laid the foundation to strengthen and grow the organization and make it of real value to members in sections and chapters. We will always have the temptation to detour from our main goals, but the current experienced board and Steve Shedlin will keep us on track. By the way, Steve is off to great start, I have a lot of confidence and admiration for his leadership.

The story of IARP should be built on the best of volunteerism, but we won't have the best leaders in the future unless we focus on leadership at every level in the association. Where will the next chapter form? Have we helped chapter leaders to understand their roles and responsibilities? Have we let section leaders know what is expected of them and let them do it?

Perhaps in the past the philosophy has been control everything you can. Don't let many have input, especially if it threatens control. Micro managing hasn't worked very well and has gotten us into a lot of trouble. Today I see a real sharing of leadership and the future is bright.

I am honored to have been a part of the reshaping of the organization. I would be remiss if I didn't point out the great job that TCAG has done under Carl Wangman's leadership. TCAG will assist us moving towards our goals in the future. I also want to add that I had to opportunity to work with and lead a great board of directors. They have done so much for this organization, and their tireless and ongoing efforts cannot be measured or thanked enough. If you see a board member, go up and shake his or her hand and say thank you. We have been very fortunate to have had them through this very tough and challenging period.

Finally, it has been a pleasure serving you, the membership. Without your support we can't be successful. You are the reason we exist. Hopefully, someday in the future, people outside our organization will look at us and remark on how well managed we are, and what a great organization IARP is. That's our goal to be the best professional organization in the world. We are striving to earn that recognition and with your continued support we will get there.

It has been a pleasure and a privilege.

Prosum (Latin: Do Good)

Rodney Isom IARP Past President

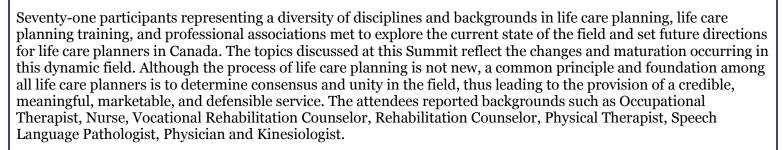


Life Care Planning - Canadian Summit 2011 Recap

On June 3 and 4, 2011, Toronto hosted the first Life Care Planning Canadian Summit. This important event was attended by Canadian life care planners representing a good cross-section of disciplines as well as international leaders in the field of Life Care Planning research, teaching, practice and policy-making. The event was initiated by the IARP Canadian Chapter in collaboration with the University of Western Ontario in an attempt to provide a forum for Canadian life care planners to develop consensus statements for the LCP practice in Canada.

Multiple organizations provided invaluable support for this event:

- International Association of Rehabilitation Professionals (IARP)
- International Academy of Life Care Planners (IALCP)
- IARP Canadian Chapter
- The Foundation for Life Care Planning Research
- The Care Planner Network
- International Commission on Health Care Certification (ICHCC)
- Canadian Society of Medical Evaluators (CSME)
- Vocational Rehabilitation Association of Canada College of Vocational Rehabilitation Professionals (CVRP)
- University of Florida



Cloie Johnson and Michel Lacerte were the co-chairs with Roger Weed providing both leadership and experience from previous summits in the use of the nominal group technique in developing consensus. Steve Yuhas, the upcoming chair for IALCP, Tony Choppa, past IALCP representative to IARP, Rick Robinson from the University of Florida and Reg Gibbs, served as Facilitators, and Lynn Parker, Carol Bierbrier, Karen Rucas, Giovanna Boniface and Janice Ray were Recorders.

Also present and assisting the IARP Canadian Chapter were Victoria Sweetman and Evie Cowitz. Victoria provided the IARP Canadian Chapter perspective to this process while Evie, the current president of VRA Ontario, provided the VRA perspective. A ListServ for Canadian life care planners is in the process of being set up. The proceedings of the Canadian Summit will be submitted shortly to the Journal of Life Care Planning. In addition, a Legal Primer for Canadian Life Care Planners is also in the works.





IARP 2011 Forensic Conference Showcases Two New Outstanding Programs

Forensics 101: Basic Training for Rehab Counselors and Life Care Planners

This program is a must for those considering a career move into the forensic practice area. Program topics include:

- Elements of a Lawsuit
 - o Federal Rules of Evidence and Civil Procedures
 - How to Qualify as an Expert
 - o Role and functions of the expert
 - o Forensic Ethics
- Processes for Setting up an Expert Practice, Marketing, Setting Fees, Basic Business Practices
- Actual Cases Pertinent to Each Topic Area Providing Practical Implications

Mock Trial – It's Not Just for Kids Anymore

Trial attorneys Adam Knight and Autumn Gentry lead a lively and spirited half-day Mock Trial. Participants will witness testimony, objections and cross-examination in a real life vocational rehabilitation expert examination. The trial illustrates areas of controversy and provides the tools to fill the testimony toolbox to use in testimony challenges.

Program benefits/takeaways include:

- Comprehensive, real time demonstration of direct and cross examination
- Challenges on credentials, report, analysis, direct testimony and previous work/testimony including publications
- Framework for giving expert testimony
- Reactions to challenges on methodology/analysis
- Handling responses in a logical and professional manner

To find out more about these outstanding sessions, please <u>download the conference brochure</u>. And remember, <u>online registration</u> for the 2011 Forensic Conference (Nov. 3-5, 2011) is now open.

--Advertisement—



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NL0910: Autism Spectrum Disorder
- Unraveling the Clues – 8 contact hours
HM3010: Standard of Care - Making
Sense of 'Practice, Ethical, Legal and
Credentialing' Guidelines in Forensic
Rehabilitation - 4 Contact Hours

NLo206R: Dual Relationships – Exploring the Limits - 6

(Pre-approved for 6 hours CRC/CDMS Ethics Credit)

ET1050: 2011 URAC Ethical Framework Class for Case Managers and Rehab Counselors

NL0106R: Models of Disability and Advocacy In Rehab Counseling 4 **HM2026:** Life Care Planning: A Step-by-Step Guide 4

LC1001: Catastrophic Case Management and Life Care Plans – 8 hours *

NLo511: The Confluence of Disability and Poverty 16 hours

* ABVE, ACM, CA BBS, CA BRN, CLCP, CMCN, CPHM, Delaware BON, Florida BON, RNs: ALL STATES, but not CRC



SSVE Section Report

(Contributed by Amy Vercillo)

I wanted to update all SSVE's on several issues.

PII-Personally Identifiable Information

Several VE's have had their BPA's cancelled secondary to PII violations. SSA confirmed that if SSVE's do not take "reasonable care" to protect PII their BPA will be cancelled. Protocol for handling PII should be consistent with HIPPA guidelines. When a PII breach occurs, SSA must notify the individuals and pay to monitor their credit. Disks and notices should not be left in the open, in public places and should be stored in a locked file cabinet/drawer. When PII is being transported the data should remain with the VE. As outlined in the BPA make sure that laptops and electronic media/devices are encrypted and password protected and that files and equipment are not left unsecured in plain view. When a BPA is cancelled due to PII violation the decision will come from the regional office and is not appealable. The decision will be based on the PII report filed.

Payments

I understand from many of the VE's nationwide that they have experienced delays in payments from the Baltimore Office of Finance over the past several months. The Office of Finance stated that they had a significant back log of vendor invoices because of the new BPA numbers effective 4/1/2011. Apparently the computer system was updated with the new BPA numbers and when invoices came in April and May with the old BPA numbers on them they had to be hand-processed. The Office of Finance anticipates that its backlog will be resolved and payment processing time will return to "normal" in August. To expedite processing make sure that you submit a separate consolidated invoice for each BPA number. Double check the call orders to make sure you submit them separately by either your old or new BPA number. Also, double check that your CCR is up to date, if it has expired your payment will be approved but cannot be released. Go to CCR.gov to check your status and update if necessary.

OIG Audit

The Office of the Inspector General is conducting an audit of the SSVE program and is currently collecting data from the hearing and regional offices. The OIG requested a copy of the *IARP-SSVE Compensation and Availability Survey* as a part of its audit. When the OIG audit is complete, the results will be presented to Congress.

Fundraising/GRR

We have a unique opportunity with the current OIG audit to have the SSVE fee schedule brought up before Congress. Once this report is completed it will be distributed to all Social Security Related Committees (Ways and Means, Social Security Subcommittee, Senate Finance, Senate Labor, Health & Human Services) and discussed. The VE program has never been brought up before Congress either in scope or function and this opportunity to address Congress needs to be utilized. We are all aware of the federal budget deficits and agency funding issues however 36 years (1979-2016 current bpa) with a 10% increase is inappropriate and not in compliance with the Federal Acquisition reasonable prices supported by valid cost/pricing data. Under the fixed pricing federal contracts the agency is required to provide support for the fee schedule in the contract.

The OIG data collection on the SSVE program and contracting will continue through the summer and then report should be presented to Congress in the fall or winter. We need to maximize our fundraising now so we can raise awareness among the legislators and staffers prior to the report being presented. The current balance of the Government Relations Campaign is \$31,515. If each VE under contract with SSA gave \$250 (3 hearings), we would reach our fundraising goal. You can donate by clicking this link: Donate Now.

SSVE Section Report

(continued from page 8)





Social Security Vocational Expert Testimony and Psychiatric Impairments: How Does the SSVE Respond to Non-Exertional Limitations in Hypotheticals

August 3, 2011

9 am Pacific – 10 pm Mountain – 11 am Central – 12 pm Eastern 2.0 CEUs Applied for: CRC, CDMS, CWA, CACC, CCMC, CVE, CLCP, ABVE

Currently 41% of adults aged 18-64 that are receiving Social Security Disability Benefits have a primary diagnosis that is mental and this diagnostic category is the fastest growing diagnostic group at application and hearing level. Non-exertional/psychiatric limitations outlined in medical records and presented in hypotheticals can be especially difficult for the SSVE to deal with utilizing the confines of the Dictionary of Occupational Titles (DOT). This webinar will review the common types of hypothetical non-exertional limitations presented at a hearing level. Presentation will include how to utilize reliable occupational information, research and how to present information that is in conflict with the DOT to respond to non-exertional hypotheticals and identify appropriate occupations and job numbers.

Webinars can be listened to live (and questions can be asked) and are recorded to be listened to at your convenience.

Register Online

Webinar Replays

In addition to this upcoming live webinar there are other webinars that can be purchased and viewed at anytime:

- SSVE Testimony: Limitations and Transferability
- Job Numbers and Labor Market Resources for SSVE's
- SSA-VE Testimony-Back to Basics

http://www.rehabpro.org/events/webinars

IARP CONNECT

Learn, Share, Collaborate



Questions recently discussed on IARP Connect

Forensic Discussions:

WLE based on projected SSA Retirement

New DOT Data

Librarian Outlook

WLE & Years to Workforce Separation

Brand-name drugs going off patent through 2015

SS-VE Discussions:

Transferability of Skills

SSVE payments

California Chapter Discussions:

Legislative updates

Wisconsin Chapter Discussions:

LMS for LOEC



2011 ISLCP Pre-Conference Sessions Announced

IARP and the IALCP Section are pleased to co-sponsor the 2011 International Symposium on Life Care Planning (September 17-18). Details about a two day pre-conference program have been announced.

Thursday, September 15, 2011

Home and Environmental Technology for the 21st Century – How It Will Impact the Practice of Life Care Planning

The Center for Assistive Technology and Environmental Access (CATEA), http://www.catea.gatech.edu/, at Georgia Tech will be presenting this preconference program on Thursday. It will focus on the things that life care planners need to consider in developing components of plans applicable for environmental modification and technological advances that help individuals with disabilities increase their functional independence/autonomy within their home and community. As life care planners, we need to stay current with the devices as well as their associated costs. An experienced rehabilitation engineer and a therapist working with CATEA will give the day long presentation. View the agenda.

Friday, September 16, 2011

Augmentative and Alternative Communication

This program will provide an overview of augmentative communication assessment, use, devices and training. The participants will have the opportunity to work with an augmentative program (if the participant brings a laptop) to better appreciate the functions of augmentative communication software. The participants will have an open forum to interact and learn from the expert(s). Actual videos of children with their devices will be shown to enhance the program. Presenters include Laura Deming, MS, RN, PNP, CCM, CLCP; Ellen Leonard, M.D., Pediatric PM&R; and Meredith Potts, MA, SLPCCC and representatives from Prentke Romich Company (PRC). This program will be packed full of useful information that is geared to helping life care planners understand the full ramifications of these devices for projecting the same accurately in life care planning. For complete details, www.islcp.org.

Save the Date



IARP Chapter News

The West Virginia Chapter of IARP held its annual conference on June 17, 2011 in Charleston WV. 53 people attended and 6 hours of CEUs were awarded. Topics included Assistive Technology, Adaptive Driving in the Mountain State, Drug Identification and Support to Treatment Strategies, Using JAN in the Private Sector Rehabilitation Practice and West Virginia Vocational Rehabilitation-Statutes, Regulations, Goals, Application & New RTW Issues.

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IARP Chapter Events

2011 Workers' Compensation Symposium

August 11-12, in Hampton, Vir.

2011 Annual ILARP Seminar September 15, 2011 in Naperville, Ill.



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I am IARP Featured Profile

Meet Don Shrey, a Disability Manager, Forensic Expert and SSA-VE with more than 25 years experience.

"A defining experience for me, as a former Rehabilitation Counselor Educator, occurred early in my university teaching career. When teaching students about job placement and the world of work, I quickly realized that neither I nor my colleagues were familiar with worksites and the dynamics that affect the employment of persons with



disabilities. I was fortunate to have received a 3-year grant from the U.S. Dept. of Education that allowed my colleagues and I the opportunity to learn the employer's perspective by visiting worksites and developing a curriculum that addressed the management of disability in business and industry. This was an epiphany for me, and my career course in Disability Management became clearly defined. I devoted the next twenty years of my career to understanding the relationships between the needs of persons with disabilities and the expectations of worksite representatives."

Read Don's complete profile
Read all the I am IARP Profiles

Other Industry News



IARP Well Represented at CORE

The Annual Meeting of the Commission on Standards and Accreditation of the Council on Rehabilitation Education (CORE) was held recently at Double Tree Hotel in Rosemont, Illinois. In attendance were the two outgoing IARP representatives (Judy Drew and Cherie King) and IARP's two newly appointed incoming representatives (John Meltzer and Scott Beveridge). We would like to thank both Judy and Cherie for their service as well as welcome John and Scott to the Commission. Dr. King, who has served as chair of the Commission for the last four years, has agreed to stay on as a consultant to assist the Commission in its transition to a new executive director of the CORE into the position.



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- Decoding a Neuropsychological Report; Are You Interpreting this Correctly?
- SSVE Testimony Regarding Limitations and Transferability -
- Anosognosia: The Impact of Impaired Self Awareness
- Clinical Judgment
- Job Numbers and Labor Market Resources for Occupations
- SSA Vocational Experts: The Basics

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