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Year One – 10-1-2015 to 9-30-2016

San Diego State university interwork institute



ANNUAL PERFORMANCE AND FINANCIAL Report: yEAR oNE

**PART A: Narrative**

**Section I: Outreach Activities**

The outreach activities for the WINTAC were completed by the end of the third quarter. The beginning of the project consisted of the assignment of State Liaisons that outreached directly to the State VR agencies. This process was augmented by follow-up to the national needs assessment survey conducted as a collaboration with the other technical assistance centers. The outreach that occurred at the end of the first year of the project was all a part of some kind of follow-up activity, and not an initial contact. The WINTAC communicates with VR programs though the State liaisons, the website, the CSAVR communication network (weekly newsletters), the CSAVR conferences, ongoing universal, targeted and intensive TA efforts, and periodic presentations to other core Workforce Development partners. There is not a need to conduct outreach efforts to VR programs any longer. The WINTAC is well known enough, we believe, to move beyond basic information about our role and purpose, to providing technical assistance in all of its forms.

**Section II: Universal TA Quarterly Reporting**

The frequency and number of contacts to the WINTAC have increased steadily over the course of the first year of the project. The vast majority of the contacts have been from and to State VR agencies. Several other types of organizations have initiated contact and asked questions and received TA from the WINTAC. Table 1 below identifies the number of center contacts by entity through the end of Year One.

Table 1

|  |
| --- |
| **Center Contacts by Entity - Year One Total** |
| **Entity** | **Number** |
| State VR Agency to WINTAC | 420 |
| Federal Agency to WINTAC | 6 |
| WINTAC to State VR Agency | 26 |
| WINTAC to Federal Agency | 47 |
| Secondary or Postsecondary Education | 43 |
| Community Rehabilitation Program | 54 |
| Other Rehabilitation Professional | 4 |
| Other public organizations (Including other TACs) | 65 |
| Other private organizations | 5 |
| Individual | 5 |
| Other | 142 |
| **Total:** | 817 |

 The WINTAC gathered data on the type of requests coming to the center. Table 2 below indicates that information on pre-employment transition services was the most frequent request, with information on the common performance measures second, and Section 511 third. Many of the requests noted below developed into targeted and/or intensive TA.

Table 2

|  |
| --- |
| **Number of WINTAC Contacts by Type of Request - Year One Total** |
| **Type** | **Number**  | **# Agreed to Follow-up** |
| Information on implementation of Pre-ETS | 218 | 96 |
| Information on Section 511 implementation | 112 | 46 |
| Information on customized and supported employment | 93 | 42 |
| Integration of VR into the Workforce Development System | 52 | 36 |
| Information on common performance measures | 112 | 76 |
| General information about WINTAC | 73 |   |
| Available resources on WIOA | 9 |   |
| Other (WIPPS) | 21 | 8 |
| **Total** | 690 | 304 |

The WINTAC website has developed into the primary way that we provide universal TA. The website has developed in this last quarter to include a training management system (TMS), where individuals can go to view archived webinars and online training available for CRC credit. Although there is only one item in this online training area at this point, the system will grow in the second year as the WINTAC develops its ability to provide training in a number of topic areas to VR staff and other partners for CRC credit. The TMS allows us to track usage for evaluation purposes. We have delayed adding a pop-up survey or survey link until we reached a point on the website where we had enough information to make the process meaningful. We believe that we have reached that point at the end of Year One and will be developing this evaluation method in the first quarter of Year Two.

Table 3 below identifies the content for the website by topic area developed during the first year of the project.

Table 3

|  |  |
| --- | --- |
| **Item** | **Number by Topic Area** |
| **Pre-ETS** | **511** | **CIE** | **Integration** | **Common Measures** |
| Promising practices and literature review | 36 | 48 | 45 | 8 | 0 |
| Resources | 37 | 6 | 25 | 24 | 6 |
| Training | 4 | 0 | 20 | 20 | 0 |
| Webinars | 4 | 0 | 3 | 3 | 0 |
| On-line training | 4 | 0 | 0 | 1 | 0 |
| Law, Regulations and Policy Implications | 6 | 18 | 6 | 13 | 7 |
| FAQs | 1 | 1 | 1 | 1 | 3 |
| Intensive TA results | 0 | 0 | 0 | 0 | 0 |
| **Total** | 92 | 73 | 100 | 70 | 16 |
| **Total items for year one available for universal TA** | 351 |

The traffic to the website increased dramatically in the fourth quarter as identified in the Information Technology Report below:

Table 4

|  |
| --- |
| **Website Traffic Overview – 4th Quarter Year One** |
| **Item** | **Number** | **Difference from previous quarter** |
| Unique visitors | 2,670 | increase by 1,410 |
| Page views | 17,732 | increase by 9,037 |
| Visits | 4,420 | increase by 2,280 |
| Returning visitors | 43% | decrease by 1% |
| New visitors | 57% | increase by 1% |
| Pages per session | 4 | decrease by 0.1 |
| Average duration per session  | 3 min. 46 sec | decrease by 8 sec. |

Table 5

**Top 10 Pages Visited – 4th Quarter Year One**

| **Pages** | **Page Views** | **Percentage** |
| --- | --- | --- |
| 1. [Home page](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/work-based-learning-experiences)
 | **2,839** | 16.01% |
| 1. [Pre-employment Transition Services](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/work-based-learning-experiences)
 | **2,136** | 12.05% |
| 1. [Log in](http://www.wintac.org/user/login)
 | **1,178** | 6.64% |
| 1. [Implementation of Section 511 Requirements](https://calendar.google.com/calendar/render?pli=1&gsessionid=YxJTtr-ItvJ1ghoxndyU2g#main_7http://www.wintac.org/topic-areas/implementation-of-requirements/)
 | **637** | 3.59% |
| 1. [Training](http://www.wintac.org/training)
 | **400** | 2.26% |
| 1. [Resources](http://www.wintac.org/resources)
 | **390** | 2.20% |
| 1. [Pre-employment Transition Services > Overview > Job exploration counseling](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/job-exploration-counseling#overlay-context=topic-areas/pre-employment-transition-services/overview/job-exploration-counseling)
 | **385** | 2.17% |
| 1. [Pre-employment Transition Services > Overview: Required Pre-ETS](http://www.wintac.org/topic-areas/pre-employment-transition-services#required_preemployemnts)
 | **354** | 2.00% |
| 1. User Profile (Login required)
 | **294** | 1.66% |
| 1. [Pre-employment Transition Services > Resources](http://www.wintac.org/topic-areas/pre-employment-transition-services/resources)
 | **293** | 1.65% |

Table 6

**Traffic Overview by States – 10 States with Higher Traffic**

| **Region** | **Sessions** | **% New Sessions** | **New Users** | **Pages / Session** | **Avg. Session Duration** |
| --- | --- | --- | --- | --- | --- |
| 1. California
 | 468 (11.63%) | 50.21% | 235 (10.69%) | 4.15 | 0:04:19 |
| 1. Texas
 | 283 (7.03%) | 66.08% | 187 (8.51%) | 3.87 | 0:03:36 |
| 1. Florida
 | 221 (5.49%) | 48.87% | 108 (4.91%) | 3.26 | 0:03:02 |
| 1. District of Columbia
 | 186 (4.62%) | 47.31% | 88 (4.00%) | 5.34 | 0:05:15 |
| 1. Michigan
 | 164 (4.07%) | 45.12% | 74 (3.37%) | 4.33 | 0:05:32 |
| 1. Pennsylvania
 | 154 (3.83%) | 50.65% | 78 (3.55%) | 4.62 | 0:05:22 |
| 1. Virginia
 | 148 (3.68%) | 47.30% | 70 (3.18%) | 5.00 | 0:05:25 |
| 1. North Carolina
 | 140 (3.48%) | 48.57% | 68 (3.09%) | 2.55 | 0:02:49 |
| 1. Illinois
 | 139 (3.45%) | 50.36% | 70 (3.18%) | 2.83 | 0:02:15 |
| 1. Arkansas
 | 120 (2.98%) | 26.67% | 32 (1.46%) | 7.28 | 0:07:13 |

The IT and traffic analysis report for the entire first year is below:

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**WINTAC Year-to-Date Report**

**Website Traffic Analysis and IT Related**

**Reporting Period: Year One**

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**Website Traffic Overview**

* Unique visitors 4,141
* Page views 32,218
* Visits 7,448
* Returning visitors 45%
* New visitors 55%
* Pagers per session 4.3
* Average duration per session 3 min. 58 sec.

**Top 10 Pages Visited**

| **Pages** | **Page Views** | **Percentage** |
| --- | --- | --- |
| 1. [Home page](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/work-based-learning-experiences)
 | **5,527** | 17.16% |
| 1. [Pre-employment Transition Services](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/work-based-learning-experiences)
 | **3,560** | 11.05% |
| 1. [Log in](http://www.wintac.org/user/login)
 | **1,719** | 5.34% |
| 1. [Implementation of Section 511 Requirements](https://calendar.google.com/calendar/render?pli=1&gsessionid=YxJTtr-ItvJ1ghoxndyU2g#main_7http://www.wintac.org/topic-areas/implementation-of-requirements/)
 | **1,086** | 3.37% |
| 1. [Resources](http://www.wintac.org/resources)
 | **757** | 2.35% |
| 1. [Training](http://www.wintac.org/training)
 | **737** | 2.29% |
| 1. [Pre-employment Transition Services > Overview > Job exploration counseling](http://www.wintac.org/topic-areas/pre-employment-transition-services/overview/job-exploration-counseling#overlay-context=topic-areas/pre-employment-transition-services/overview/job-exploration-counseling)
 | **615** | 1.91% |
| 1. [About Us > Information about Us](http://www.wintac.org/about-us/information-about-us)
 | **604** | 1.87% |
| 1. [Pre-employment Transition Services > Laws, Regs, and Policy](http://www.wintac.org/topic-areas/pre-employment-transition-services/laws-regs-and-policy)
 | **592** | 1.84% |
| 1. [Pre-employment Transition Services > Resources](http://www.wintac.org/topic-areas/pre-employment-transition-services/resources)
 | **540** | 1.68% |

**Traffic Overview by States – 10 States with Higher Traffic**

| **Region** | **Sessions** | **% New Sessions** | **New Users** | **Pages / Session** | **Avg. Session Duration** |
| --- | --- | --- | --- | --- | --- |
| 1. California
 | 985 (14.60%) | 38.38% | 378 (10.84%) | 5.83 | 0:05:40 |
| 1. Florida
 | 408 (6.05%) | 44.36% | 181 (5.19%) | 3.71 | 0:03:18 |
| 1. District of Columbia
 | 383 (5.68%) | 42.56% | 163 (4.67%) | 4.53 | 0:04:15 |
| 1. Pennsylvania
 | 350 (5.19%) | 36.29% | 127 (3.64%) | 5.41 | 0:05:41 |
| 1. Texas
 | 345 (5.11%) | 65.51% | 226 (6.48%) | 3.87 | 0:03:13 |
| 1. Michigan
 | 303 (4.49%) | 43.89% | 133 (3.81%) | 4.41 | 0:05:17 |
| 1. Arkansas
 | 221 (3.28%) | 32.58% | 72 (2.06%) | 6.34 | 0:06:09 |
| 1. Ohio
 | 215 (3.19%) | 25.58% | 55 (1.58%) | 6.53 | 0:06:16 |
| 1. Indiana
 | 213 (3.16%) | 52.11% | 111 (3.18%) | 4.58 | 0:05:04 |
| 1. Virginia
 | 210 (3.11%) | 53.81% | 113 (3.24%) | 4.44 | 0:04:47 |

**IT Related Accomplishment/Progress**

The WINTAC-IT Team has been working closely with staff members from the five topic areas to provide consistent and reliable support on the following areas:

1. **Website with 5 Sub-Sites**

The WINTAC-IT team manages and supports the project website, which contains 5 sub-sites. After the initial set up of the site, each of the topic areas went through changes in the page structures and the format of each page. IT Team worked with each of the topic area to implement the changes in both front- and back-ends as needed.

1. **Domain Name Renewal**

WINTAC domain name has been renewed.

1. **Apps – TimeCert**

The TimeCert application allows project staff to certify the hours allocated in the project. The WINTAC-IT team designed, developed, and released the web application. Based on the feedback from the project staff, the application went through a revision.

1. **Apps - TA Trac**

The WINTAC-IT team designed, developed, and released the TA Trac, which allows the project staff to record their Technical Assistance efforts. After the release, the WINTAC IT team received feedback from the project staff and made the 1st revision on the application. Currently the WINTAC-IT team is going through the 2nd revision to create integration with the intensive technical assistance agreement (ITAA).

1. **Apps - Intensive TA Agreement (ITAA)**

The WINTAC-IT Team designed, developed, and released another web application, the Intensive TA Agreement (ITAA). Using the application, project staff will create an electronic draft of the Intensive TA Agreement. Based on the feedback received after the release, the WINTAC-IT team is going through the 1st revision on the application. For more accurate tracking, the information entered into the ITAA will get integrated with the TA Track in the upcoming project year.

1. **Distribution Lists (one per each topic area) integrated with the Website**

Project staff requested to use a mailing list, through which various information, resources, training opportunities can be sent out to those who are interested in different topics. The WINTAC-IT team set up and configured distribution lists for each topic area. After setting up the distribution lists, the team also created a customized page on the website where visitors can subscribe the email address to one or more topic areas. The initial 300 subscribers collected by the topic areas 4 and 5 are imported manually by the IT Team.

In addition, the team provided the following support for each of the topic areas:

* 1. Design template for each distribution list;
	2. Programing the messages for each distribution, ensuring the accessibility of the message;
	3. Scheduling/sending designed message through the distribution list; and
	4. Export subscriber list, as requested.
1. **Training Management System (TMS)**

The WINTAC-IT team installed and customized a learning management system to create the WINTAC’s Training Management System (TMS), which will be the main environment to provide various training. The training delivery methods include live training, recorded webinars, self-paced training, and other types of training materials.

The WINTAC-IT team created the integration between the CMS-based website and the LMS-based TMS to allow a single user login. This allows users to use only one login to access both WINTAC website where the logging in is required and the TMS.

1. **Live Training System in place – integrated with TMS**

Some of the WINTAC training will be provided in live format by utilizing a webinar system. The WINTAC-IT team researched and implemented a webinar system. Based on the reporting requirements, the team went through the intensive customization to create an integration between the webinar system, TMS, and the website, so that users will use only one login to access the live training, take quizzes, and acquire a Certificate of Completion or a CRC Credit.

Based on the feedback from the project staff and the live training participants, the project team decide to change the live training/webinar access separated from the TMS access. The team is currently working on this adjustment.

1. **On-going Technical Support**

In addition to the development and customization of the applications and tools listed above, the WINTAC-IT Team provided on-going technical support for the following:

* 1. **Website and Accessibility**

The team worked with each topic area to make content updates on the websites. For the materials sent to the team to be posted on the website, the IT Team ran the accessibility check and communicated with the project staff to ensure the website accessibility.

* 1. **WINTAC Apps - TimeCert, TA Trac, and ITAA**

When any issues are reported, the IT team communicate with the users to resolve the issue.

* 1. **TMS and Training**

The IT Team worked closely with the topic areas 4 and 5 to prepare their first live training sessions. Through the process, the IT Team set up and shared the WINTAC Training guidelines to assist the project staff to plan their training. The team supported the first live training session, which included using a webinar room, a quiz, an issuing of certificate of completion upon successful completion of the quiz.

* 1. **Email and WINTAC and TACC listserv**

When requested, the IT team creates a new WINTAC email address for newly hired/started WINTAC project staff. The team also provides technical support for both WINTAC and TACC listservs.

* 1. **Distribution list**

Project staff from different topic areas sent the message to be disseminated to their distribution list. The IT team create the message using the proper HTML format and sent them out to the appropriate distribution list.

* 1. **Google Drive**

WINTAC Google Drive is managed and supported by the IT team. When requested, a new user is added or removed from the WINTAC Google Drive.

The WINTAC website is starting to get populated with promising, effective or best practices as more VR programs create materials and develop programs in response to WIOA. There haven’t been many best practices to post to this point, because most of the VR programs have not fully developed or implemented WIOA-based programs. As an example, it has been very difficult to gather best practices for Section 511 implementation because most agencies have not fully developed their career counseling and information and referral (CC&I&R) materials yet. The WINTAC met with the Idaho general VR program to develop CC&I&R documents over the course of two days in September this quarter. The product of that meeting was a presentation that IDVR staff will make to individuals working in subminimum wage employment in Idaho. This presentation has been shared with four VR programs since its development, and each program expressed tremendous gratitude for giving them something to work from. In effect, the WINTAC was able to develop a best practice with Idaho that has already impacted other programs. We anticipate that much of our information on best practices across the topic areas may stem from this kind of activity.

The WINTAC is utilizing RSA to review questions submitted by VR programs, and to review Tool Kit items like MOU templates for VR programs. The pre-employment transition services team developed a template of an MOU between a VR program and a local education agency. This MOU template has been shared numerous times since its approval by RSA and we are duplicating this effort in the MOU requirements between VR and DD agencies, core partners in the Workforce System, and other agencies.

The “Request TA” link available from the website has increased in usage in the last quarter. The WINTAC received 12 requests for TA from the link in the fourth quarter, which was the total requested for the year. These questions, primarily regarding implementation of Section 511, came from CRPs, DD agencies, school and university staff, and VR staff. Table 7 below identifies the requests by agency type and topic:

Table 7

|  |  |
| --- | --- |
| **Agency Type** | **Topic Area** |
| **Pre-ETS** | **511** |
| VR Agency | 1 | 1 |
| Developmental Disabilities Agency |   | 3 |
| Secondary or postsecondary education |   | 3 |
| CRP |   | 4 |
| **Total** | 1 | 11 |

Most of the universal TA requests that began in the 2nd and 3rd quarters have developed into targeted or intensive TA. The fourth quarter only included four requests for TA that would be considered universal in nature through avenues other than the website, such as phone or e-mail. These requests came from Colorado combined, DC combined, New York general, and Pennsylvania combined. These requests were as follows:

* Colorado combined: A series of questions regarding Section 511
* DC combined: A series of questions on pre-employment transition services and common performance measures. This activity is likely to lead to an intensive TA agreement with them.
* New York general: A series of questions on common performance measures and best practices for transitioning to these measures. This is likely to lead to a Targeted TA intervention.
* Pennsylvania combined: Although we have been working with Pennsylvania to become a SARA pilot site, they had their first request for information/TA outside of that area in the fourth quarter. They requested information on pre-employment transition services and Section 511.

**Section III: Targeted TA**

The fourth quarter of Year One was a very busy time for targeted TA. In tables 8-10 below, the progression and intensity of targeted TA by quarter is illustrated:

Table 8

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| **Targeted TA 1st and 2nd Quarters Year One** |
| **Number of Attendees/Participants by Agency**  |
| **Agency** | **Number** |
| State VR Agency | 28 |
| Federal Agency | 14 |
| Secondary or Postsecondary Education | 9 |
| Community Rehabilitation Program |   |
| Other Rehabilitation Professional | 5 |
| Other public organizations | 7 |
| Other private organizations |   |
| Individual |   |
| Other |   |
| **Total:** | 63 |

Table 9

|  |
| --- |
| **Targeted TA in the 3rd Quarter Year One** |
| **Number of Attendees/Participants by Agency**  |
| **Agency** | **Number** |
| State VR Agency | 422 |
| Federal Agency | 1 |
| Secondary or Postsecondary Education | 2 |
| Community Rehabilitation Program | 94 |
| Other Rehabilitation Professional |   |
| Other public organizations |   |
| Other private organizations | 3 |
| Individual |   |
| Other |   |
| **Total:** | 522 |

Table 10

|  |
| --- |
| **Targeted TA in the 4th Quarter Year One** |
| **Number of Attendees/Participants by Agency**  |
| **Agency** | **Number** |
| State VR Agency | 624 |
| Federal Agency |   |
| Secondary or Postsecondary Education | 101 |
| Community Rehabilitation Program | 60 |
| Other Rehabilitation Professional | 25 |
| Other public organizations | 7 |
| Other private organizations | 32 |
| Individual | 1 |
| Other |   |
| **Total:** | 850 |

 There were a total of 55 targeted TA interventions in Year One, most of which included several contacts. Table 11 below includes the totals for each type of organization for Year One:

Table 11

|  |
| --- |
| **Targeted TA Total for Year One** |
| **Number of Attendees/Participants by Agency**  |
| **Agency** | **Number** |
| State VR Agency | 1074 |
| Federal Agency | 15 |
| Secondary or Postsecondary Education | 112 |
| Community Rehabilitation Program | 154 |
| Other Rehabilitation Professional | 30 |
| Other public organizations | 14 |
| Other private organizations | 35 |
| Individual | 1 |
| Other |   |
| **Total:** | 1435 |

The details of the targeted TA that was provided in the fourth quarter are below:

1. Date: 7-14-16 to 9-30-16
2. State VR agency(s) receiving TA: **Alaska VR and Workforce Partners**
3. Type of event/activity: Four SARA demos
4. Topic areas: common performance measures
5. Number of attendees/participants by agency: 5 State VR and 7 workforce partners
6. Description: A series of SARA demos to Alaska and their workforce partners. We included this as a targeted TA because it was a repeated process over three months and led to inclusion of Alaska into the SARA pilot ultimately.
7. Number of participants that agreed to follow-up: part of the intensive TA agreement and SARA pilot
8. Date: 7-22-16
9. State VR agency(s) receiving TA: **Arkansas General**
10. Type of event/activity: Teleconference series
11. Topic areas: 511
12. Number of attendees/participants by agency: 3
13. Description: This was a series of calls and emails regarding implementation of section 511
14. Number of participants that agreed to follow-up: 0
15. Date: 7-15-16
16. State VR agency(s) receiving TA: **Arizona combined**
17. Type of event/activity: Face-to-face meeting
18. Topic areas: Pre-ets 511, CIE and CPM
19. Number of attendees/participants by agency: 11
20. Description: This was a face-to-face meeting that involved three members of the WINTAC and the Executive management team in Arizona to review their needs around the four topic areas noted above. This meeting resulted in an intensive TA plan that is still active
21. Number of participants that agreed to follow-up: 11 – follow-up resulted in an intensive TA agreement
22. Date: 9-13-16 through present
23. State VR agency(s) receiving TA: **None. This TA was provided to 25 secondary school educators and 27 private non-profit staff** that work for the Family Resource Centers in California and who provide services to youth in the PROMISE program in California.
24. Type of event/activity: Seminar presentation and a series of follow-up calls and e-mails
25. Topic areas: Pre-ETS, 511 and common performance measures.
26. Number of attendees/participants by agency: 52 total as identified above
27. Description: I was asked to present a training to individuals that provide services to youth in the CaPROMISE program at their annual training in San Diego. I would typically consider this presentation on WIOA to be universal TA, but the series of calls and e-mails that followed rose to the level of targeted TA in my opinion. The secondary school staff were very interested in more information on WIOA as they have not had any organized training on the law.
28. Number of participants that agreed to follow-up: 3 staff from the Desert Mountain SELPA and San Diego Unified have been the most active in reaching out for further information and follow-up.
29. Date: 7-21-16 through present
30. State VR agency(s) receiving TA: **CNMI combined**
31. Type of event/activity: Teleconferences and e-mail TA
32. Topic areas: Common performance measures and pre-ets
33. Number of attendees/participants by agency: 4
34. Description: A series of teleconferences and e-mail has occurred with CNMI at their request to cover the areas of pre-employment transition services and the CPMs.
35. Number of participants that agreed to follow-up: 4
36. Date: 7-27-16 through 8-31-16
37. State VR agency(s) receiving TA: **Florida general**
38. Type of event/activity: Series of calls and meeting to provide TA
39. Topic areas: Pre-ETS, 511, service alignment and CPMs
40. Number of attendees/participants by agency: 6
41. Description: A series of call to discuss TA needs regarding Section 511, CPMs, and service alignment.
42. Number of participants that agreed to follow-up: 1
43. Date: 8-15-16
44. State VR agency(s) receiving TA: **Southeastern State VR agencies** including Florida, North and South Carolina, Alabama, Mississippi, Louisiana and Puerto Rico.
45. Type of event/activity: Teleconference call
46. Topic areas: CPMs and 911 reporting
47. Number of attendees/participants by agency: 25
48. Description: This was a scheduled conference call for Southeastern states to discuss among themselves how they are responding to the implementation of the Common Performance Measures and the new 911 data elements. Among topics discussed were materials and training approaches being used the different states to prepare their staff - managers and counselors - for the new performance measures.
49. Number of participants that agreed to follow-up: 0
50. Date: 8-5-16
51. State VR agency(s) receiving TA: **Mississippi combined**
52. Type of event/activity: Teleconference
53. Topic areas: CPMs
54. Number of attendees/participants by agency: 4
55. Description: This was a teleconference with Mississippi VR staff on the common performance measures and the challenges that the agency is facing in transitioning to the new measures and reporting. Areas addressed included implications for CRPs, contracts and performance evaluations.
56. Number of participants that agreed to follow-up: 1
57. Date: 8-24-16 to present
58. State VR agency(s) receiving TA: **Indiana combined**
59. Type of event/activity: Face-to-face meeting following form e-mails and calls
60. Topic areas: pre-ets and 511
61. Number of attendees/participants by agency: 6
62. Description: Following a series of calls and e-mails regarding questions on pre-employment transition services and Section 511, WINTAC staff had an in-person meeting with Indiana and the Y-TAC, which will be a partner in the eventual intensive TA agreement.
63. Number of participants that agreed to follow-up: 5
64. Date: 7-1-16 through 9-30-16
65. State VR agency(s) receiving TA: **Iowa Blind**
66. Type of event/activity: Face-to-face meeting, calls and e-mails over an extended period that led to a pending intensive TA agreement
67. Topic areas: Pre-ETS, competitive integrated employment (customized employment), integration of VR and CPMs.
68. Number of attendees/participants by agency: 7
69. Description: This entry represents a targeted TA process that led to the development of an intensive TA agreement in cooperation with the Y-TAC, the TC-TAC, and the JDVRTAC. The meetings included:

7/8 & 15 - Completing analysis of General Needs Assessment with TC-TAC (Dr. Kundu) - (1 hour)
8/5 - Pre-ETS activities w/ SMEs (1 hour)
8/5 - CPM activities w/ SMEs (1 hour)
8/8 - Service integration activities (1 hour)
8/11 & 31 - activity discussions with IDB Program Administrator (2 hrs)
9/15 - Meeting with 5 staff and 5 SMEs (5 hrs)
9/27 - review activity outcomes with Program Administrator - (1 hour)
9/28 - coordination with JDVRTAC (1 hr)
9/30 - coordination with YTAC (.5 hr)

1. Number of participants that agreed to follow-up: 1
2. Date: 7-6-16
3. State VR agency(s) receiving TA: **Kentucky, Florida, Washington, North Dakota, Virginia, Texas, West Virginia, Missouri, Wisconsin and Nebraska**.
4. Type of event/activity: Teleconference
5. Topic areas: Integration of VR
6. Number of attendees/participants by agency: 24
7. Description: This was a teleconference that generated from those VR programs that signed up for the service integration distribution list. The purpose was to discuss creating partnerships with DOL partners and sharing effective practices and tools that contribute to service alignment in the AJCs. This group forms the basis for the beginning of the community of practice in this area.
8. Number of participants that agreed to follow-up: All agencies present
9. Date: 7-18-16 through present
10. State VR agency(s) receiving TA: **Kentucky general and blind**
11. Type of event/activity: face-to-face and calls and emails
12. Topic areas: all 5 areas
13. Number of attendees/participants by agency: 4
14. Description: This series of targeted TA culminated in a face-to-face meeting that forms the foundation for a pending intensive TA agreement in partnership with the Y-TAC.
15. Number of participants that agreed to follow-up: 4
16. Date: 8-4-16
17. State VR agency(s) receiving TA: **Louisiana combined**
18. Type of event/activity: phone calls
19. Topic areas: Pre-ets and integration of VR
20. Number of attendees/participants by agency: 2
21. Description: Louisiana indicated that they wanted to follow-up with the WINTAC after the final Regs were published. A series of conversations occurred regarding questions they had about pre-employment transition services and integration of VR. These conversations and questions and answers are ongoing.
22. Number of participants that agreed to follow-up: 0
23. Date: 8-15-16
24. State VR agency(s) receiving TA: **Massachusetts combined, Connecticut Blind, New York general and blind and Rhode Island general and blind**
25. Type of event/activity: Teleconference
26. Topic areas: CPMs and 911 reporting
27. Number of attendees/participants by agency: 25
28. Description: This was another multiple agency teleconference set up to help VR agencies get answers to questions around the common performance measures and 911 reporting.
29. Number of participants that agreed to follow-up: 25
30. Date: 8-10-16
31. State VR agency(s) receiving TA: **Minnesota General**
32. Type of event/activity: Face-to-face training
33. Topic areas: Competitive integrated employment
34. Number of attendees/participants by agency: 35
35. Description: On-site training and facilitation were provided by consultant Ellen Condon. The training was delivered to MVRS Regional Area Mangers and Specialist. They are challenged in determining a model for CIE employment. The training was designed to provide staff with knowledge and skills to place these individuals. Ongoing TA will be provided. Minnesota has an intensive TA agreement pending.
36. Number of participants that agreed to follow-up: 0
37. Date: 7-5-16 through present
38. State VR agency(s) receiving TA: **Mississippi combined**
39. Type of event/activity: calls, emails and videoconference
40. Topic areas: Pre-ets, 511 and CPMs
41. Number of attendees/participants by agency: 12
42. Description: A series of targeted TA calls and a videoconference to discuss TA needs in the identified areas. There was a series of questions and answers submitted and responded to in addition to discussion about the activities that would be included in an intensive TA agreement. This agreement is likely to develop as a result of these conversations.
43. Number of participants that agreed to follow-up: 2
44. Date: 7-5-16 through present
45. State VR agency(s) receiving TA: **Montana combined**
46. Type of event/activity: A series of calls, a focus group by teleconference, and an in-person visit.
47. Topic areas: all 5 topic areas
48. Number of attendees/participants by agency: 24
49. Description: This entry represents several calls, emails, and an in-person visit that have been aimed at helping the agency get answers to questions on all five topic areas, and which will form the basis for the intensive TA agreement with them.
50. Number of participants that agreed to follow-up: 4
51. Date: 7-13-16
52. State VR agency(s) receiving TA: **Multiple agencies**
53. Type of event/activity: Pre-conference session to answer agency and CRP questions on pre-employment transition services and 511.
54. Topic areas: Pre-ETS and 511
55. Number of attendees/participants by agency: 60 VR staff, 75 school staff, 40 CRP staff and 25 other professionals.
56. Description: PA Transition and TA Network hosts an annual training conference on Transition in partnership with the state VR agency. This year, WINTAC was asked to facilitate a pre-conference day with State VR agencies and stakeholders providing transition services in PA on pre-employment transition services.
57. Number of participants that agreed to follow-up: 1
58. Date: 9-3-16 through 9-30-16
59. State VR agency(s) receiving TA: **Nebraska General**
60. Type of event/activity: Teleconference
61. Topic areas: CIE (customized employment)
62. Number of attendees/participants by agency: 8
63. Description: A series of teleconferences regarding developing customized employment as a service in Nebraska. This will form the basis for an intensive TA agreement once the CE training certificate is developed.
64. Number of participants that agreed to follow-up: 3
65. Date: 9-29-16
66. State VR agency(s) receiving TA: **Multiple agencies attending NRLI**
67. Type of event/activity: In-person training/presentation
68. Topic areas: Common performance measures
69. Number of attendees/participants by agency: 20 State VR agency staff
70. Description: Provided a three hour presentation on the common performance measures to VR agency staff attending the National Rehabilitation Leadership Institute
71. Number of participants that agreed to follow-up: 0
72. Date: 9-16-16
73. State VR agency(s) receiving TA: **Multiple** including Oregon blind and general, Washington blind and general, Maine blind and general, Delaware blind and general, New Hampshire, Pennsylvania, North Dakota and Connecticut blind and general.
74. Type of event/activity: Teleconference
75. Topic areas: Pre-ets and VR integration
76. Number of attendees/participants by agency: 30 VR staff, one educational staff and one individual
77. Description: Information from each state had been requested regarding some aspect of Memos of Understanding with Educational Entities for transition services and pre-employment training services. John Connolly, CSAVR, elicited examples of MOUs, including self-identified best practices from State VR Directors. Lou Adams reviewed and compared MOUs from those submitted and compared those to WIOA. The headings required by law and the other common headings for the MOUs were placed into a document and shared with those who had submitted MOUs. Information shared included: What level of detail to you recommend for TA on MOUs. What have you found useful? What are your issues and concerns with the MOUs with Educational Entities? In what ways are you working/coordinating currently with Educational Entities on Transition Services, Who pays for which services, and coordination on Pre-employment Services and Section 511?

The WINTAC Tool Kit Guide: The Formal Interagency Agreement Pre-Employment Transition Services and Transition Services was shared and discussed as a resource for the specific areas of MOUs addressing pre-employment services.
78. Number of participants that agreed to follow-up: 6
79. Date: 9-14-16
80. State VR agency(s) receiving TA: **Pennsylvania**
81. Type of event/activity: Teleconference
82. Topic areas: 511
83. Number of attendees/participants by agency: 1
84. Description: The VR program had follow-up questions on the Final Regulations regarding Section 511. This came as the result of a lengthy previous conversation we had regarding Section 511 and other topics.
85. Number of participants that agreed to follow-up: 1
86. Date: 8-19-16
87. State VR agency(s) receiving TA: **Rhode Island combined**
88. Type of event/activity: Teleconference
89. Topic areas: pre-employment transition services
90. Number of attendees/participants by agency: 4
91. Description: Rhode Island contacted the pre-ets team for a call with their Director, Ron, Kat, their field services chief, and Joanne Nanig, QA and data to discuss pre-ets questions. They are were seeking clarity on tracking requirements for potentially eligible as well as pre ets expenditures. They also had questions related to their plan for the provision of pre-ets. They are sending us a draft document for review of the services they are making available with the reserve requirements.
92. Number of participants that agreed to follow-up: 1
93. Date: 9-6-16 to 9-8-16
94. State VR agency(s) receiving TA: **Multiple**
95. Type of event/activity: Conference panel discussion
96. Topic areas: CPMs
97. Number of attendees/participants by agency: 140
98. Description: The WINTAC was part of a keynote panel at the 2016 Summit Conference on Program Evaluation. Our role on the panel was to talk about what WINTAC has heard from states about the challenges and successes in the implementation of the Common Performance Measures and 911 reporting. Also discussed the organizational culture changes that may occur as SVRA's work to meet the new Common Performance Measures.
99. Number of participants that agreed to follow-up: 0
100. Date: 7-21-16 through 9-5-16
101. State VR agency(s) receiving TA: **Tennessee**
102. Type of event/activity: Teleconference
103. Topic areas: Pre-ets and CPMs
104. Number of attendees/participants by agency: 8
105. Description: This 1 and 1/2 hour call was a follow-up to previous TA calls. It included TN staff responsible for district s, IT and case management documentation and expenditures. Specific questions are how to identify "potentially eligible" students, how to provide pre-ets statewide, ensuring that 15% reserve is spent, updating the interagency agreement with SEA, and strategies for competitive, integrated employment. Tennessee was moving towards an intensive TA plan and then decided to stick with targeted TA until they are through with the JDVRTAC in order to manage their time and resources.
106. Number of participants that agreed to follow-up: 1
107. Date: 9-19-16
108. State VR agency(s) receiving TA: **Wisconsin combined**
109. Type of event/activity: Teleconference
110. Topic areas: Pre-ETS
111. Number of attendees/participants by agency: 5
112. Description: Discussion was in the area of Pre-employment transition services. Specifically they asked about required documentation of disability for a student and potentially eligible students. What data had to be collected for 911 on Pre-ETS. Examples from other states on how they are providing services through providers..... We shared the Alaska examples. They have a lot of concerns with the Milwaukee metro area and are considering doing an outreach effort for potentially eligible students.
113. Number of participants that agreed to follow-up: 1

**Section IV: Intensive TA**

Year One resulted in the development of nine intensive TA agreements that have been approved by the respective VR agencies. This number far surpassed the requirement of two in the first year. It was the purposeful intention of the WINTAC to make the development of these agreements a task of the WINTAC staff and not the VR agency in order to make the process easy for them. Several of the intensive TA agreements included collaboration with other TA Centers. The process typically included the following steps:

1. Outreach by the state liaison to identify needs;
2. A series of calls and emails to clarify the needs and answer questions. This process often resulted in targeted TA for a period of time prior to the intensive TA agreement being developed and to assemble the team to meet the needs;
3. A face-to-face meeting to develop activities and identify outputs and desired outcomes;
4. The writing of the plan and submission to the VR agency for review and revision;
5. Agreement by the VR agency to the plan; and
6. Submission of the plan to the RSA project officer.

The most frequent topic areas identified as in need of TA included pre-employment transition services, implementation of the requirements of Section 511, and competitive integrated employment, specifically the development of customized employment as a service. The transition to the common performance measures was also a frequent need identified, though not at the level of the other three.

Significant progress has been made on the completion of activities identified in the early intensive TA agreements developed such as California and South Carolina Blind, while others are in the process of planning, implementation and completion. Table 12 identifies the VR agencies that have completed TA agreements in place, that have pending agreements, and that are in the process of being developed. Those identified as active States means that the intensive TA agreement has been completed, signed by the VR program and submitted to RSA. The “Agreements pending” list includes those VR agencies that have intensive TA agreements in some phase of completion, and the “Coming soon” list includes those that are very likely to have agreements developed in the first six months of Year Two.

Table 12 includes an identification of the topic areas covered by the TA agreement and the other TACs that are partners in the agreement. The Youth TAC has been the most frequent partner of the WINTAC in intensive TA to this point.

|  |
| --- |
| **Table 12:Intensive TA Agreements for Year One** |
| **Active States** | **Topic Areas Covered by the Agreement**  | **TAC Partners** |
| Pre-ETS | 511 | CIE | Integration | CPMs | Y-TAC | JDVRTAC | NTACT | PEQA | DEI |
| California Comb. |   | X | X |   |   |   |   |   |   |   |
| South Carolina Blind |   |   | X | X |   |   |   |   |   |   |
| Alaska Comb. | X | X | X | X | X | X |   | X | X |   |
| Arizona Comb. | X | X |   |   | X | X |   | X |   |   |
| Hawaii Comb. | X | X | X | X | X |   |   |   |   |   |
| Idaho General |   | X | X |   |   |   |   |   |   |   |
| Maryland Comb. | X |   |   |   |   |   |   |   |   |   |
| Nevada Comb. | X | X | X |   | X | X |   | X |   |   |
| Virginia Blind | X |   |   |   |   | X |   |   |   |   |
| **Agreements Pending** |   |   |   |   |   |   |   |   |   |   |
| Indiana Comb. | X | X |   |   | X |   |   |   |   |   |
| Iowa Blind | X |   | X | X | X | X | X |   |   | X |
| Kentucky Gen/Blind | X |   |   |   | X | X |   |   |   |   |
| Minnesota Gen. | X | X |   |   |   | X |   |   |   |   |
| Colorado Comb. |   |   |   |   | X |   |   |   |   |   |
| **Coming Soon** |   |   |   |   |   |   |   |   |   |   |
| Mississippi Comb. |   |   |   |   |   |   |   |   |   |   |
| Louisiana Comb. |   |   |   |   |   |   |   |   |   |   |
| Montana Comb. |   |   |   |   |   |   |   |   |   |   |
| Rhode Island Comb. |   |   |   |   |   |   |   |   |   |   |

**Intensive TA Activities, Outputs and Outcomes:**

 Each of the intensive TA agreements is developed around a logic model that identifies the activities, outputs and outcomes (short and long term). It is not possible yet to determine if the intended outcomes of the activities have been achieved because there has not been enough time that has passed since the implementation of the activities. The status of the activities and the outputs are able to be reported, and is contained in Table 13. The outputs are highlighted in yellow to easily separate them from their associated activities.

**Table 13: Intensive TA progress in Activities and Outputs by VR Agency Year One**

|  |  |  |
| --- | --- | --- |
| **VR Agency, Activities and Outputs** | **Activity Progress** | **Output Progress** |
| Complete | In Progress | Not Started | Met | Partial | Not Met |
| **California Combined** |  |  |  |  |  |  |
| Strategic planning for implementation of Section 511 | X |   |   |   |   |   |
| Strategic plan with steps identified to implement Section 511 requirements |   |   |   |   | X |   |
| Develop service team responsibilities for 511 | X |   |   |   |   |   |
| Duty statements for each team member completed |   |   |   | X |   |   |
| Develop timeline for 511 implementation | X |   |   |   |   |   |
| Completed timeline |   |   |   |   | X |   |
| Develop CC&I&R resources | X |   |   |   |   |   |
| Completed CC&I&R resources developed |   |   |   | X |   |   |
| Develop self-advocacy resources |   | X |   |   |   |   |
| Number of resources developed |   |   |   |   | X |   |
| Develop statewide WIOA training plan | X |   |   |   |   |   |
| Completed plan |   |   |   | X |   |   |
| Research CE models nationally | X |   |   |   |   |   |
| Number of CE models provided to DOR |   |   |   | X |   |   |
| Research rates paid for the provision of CE by other VR programs | X |   |   |   |   |   |
| Rate structure provided to DOR |   |   |   | X |   |   |
| Training on CE to CRPs and VR staff |   |   | X |   |   |   |
| Number of CRP and DOR staff that receive training |   |   |   |   |   | X |
| Feasibility study of in-house CE provision |   | X |   |   |   |   |
| Completed feasibility study provided to DOR with recommendations |   |   |   |   |   | X |
| **South Carolina Blind** |  |  |  |  |  |  |
| TCI training for core team of SCCB who will become TCI trainers | X |   |   |   |   |   |
| A trained cadre of staff who will train other staff |   |   |   | X |   |   |
| Development of a plan to expand and sustain LMI training using the career index | X |   |   |   |   |   |
| A written plan outlining activities, time lines, roles and responsibilities |   |   |   |   | X |   |
| Development of agency policy and procedures regarding LMI training |   | X |   |   |   |   |
| Written and promulgated agency policies and procedures |   |   |   |   | X |   |
| Evaluation of TCI+ utilization by SCCB staff |   | X |   |   |   |   |
| Completed evaluation that identifies utilization of TCI+ by SCCB staff and the effect on vocational counseling and employment outcomes of consumers |   |   |   |   |   | X |
| **Idaho General** |  |  |  |  |  |  |
| Strategic planning with IDVR for implementation of Section 511requirements | X |   |   |   |   |   |
| A completed strategic plan with responsibilities and timelines |   |   |   | X |   |   |
| Assist the VR program to develop process mapping and policies and procedures that will ensure they are compliant with all of the requirements of Section 511 |   | X |   |   |   |   |
| Completed mapping and policies and procedures that address documentation requirements of Section 511 |   |   |   |   | X |   |
| Assist in the development of career counseling, and information and referral services to be provided to youth and adults prior to entering into SMW jobs, and those currently employed in SMW jobs that are known to IDVR at the prescribed time intervals | X |   |   |   |   |   |
| Number and type of CC&I&R resources developed and the number and percentage of youth and adults that receive this information at prescribed intervals |   |   |   | X |   |   |
| Assist IDVR to identify and provide information on self-advocacy, self-determination and peer mentoring training opportunities that can be made available to individuals working in SMW for employers with less than 15 people |   | X |   |   |   |   |
| Percent of individuals that receive information on self-advocacy, self-determination and peer mentoring opportunities available in their geographic area at prescribed intervals |   |   |   |   |   | X |
| Provide information to IDVR on customized employment models and rates as a foundation for the development of their model and rate structure for the provision of CE in Idaho | X |   |   |   |   |   |
| The number of rates and models provided to IDVR from other State VR agencies that provide CE |   |   |   | X |   |   |
| Review and/or development of policies and procedures for CE |   |   | X |   |   |   |
| Completed and approved policies and procedures governing the provision of CE |   |   |   |   |   | X |
| Arrange for the provision of training on CE to IDVR staff and CRPs in Idaho to assess when CE should be provided and to develop capacity to provide CE |   |   | X |   |   |   |
| The number of CRP and IDVR staff that attend and completed the training |   |   |   |   |   | X |
| **Nevada Combined** |  |  |  |  |  |  |
| WINTAC will work with NRD to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   | X |   |
| WINTAC will work with NRD to explore and expand pre-ets services delivery through an online /electronic modality for students with disabilities |   |   | X |   |   |   |
| A completed assessment, analysis and recommendations for possible online or electronic options for providing pre-ets services to the large geographic areas of Nevada |   |   |   |   |   | X |
| Work with NRD to develop and implement a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for Pre-ETS |   | X |   |   |   |   |
| A completed plan that identifies allowable expenditures and the activities and services on which the funds will be spent |   |   |   |   | X |   |
| Development and/or review of existing documentation policies and procedures for the provision of Pre-ETS and expenditures |   |   | X |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   |   | X |
| Review current interagency agreements with NRD and LEAs and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA; and develop and implement inter-local agreements with each of the 16 school districts in Nevada consistent with the template identified above |   | X |   |   |   |   |
| Completed review of agreements with the development of a template that can be used across all school districts in the State |   |   |   |   | X |   |
| Strategic planning with NRD for implementation of Section 511requirements |   | X |   |   |   |   |
| A completed strategic plan with responsibilities and timelines |   |   |   |   | X |   |
| Development and/or review of CC&I&R and self-advocacy materials |   | X |   |   |   |   |
| Completed CC&I&R and self-advocacy materials |   |   |   |   | X |   |
| Arrange for the provision of training on CE to NRD staff and CRPs in Nevada to assess when CE should be provided and to develop capacity to provide CE |   |   | X |   |   |   |
| Number of individuals that attend training |   |   |   |   |   | X |
| Assist NRD to identify processes to capture and report data necessary for the CPMs |   | X |   |   |   |   |
| Completed process-mapping; and a vision/plan for how NRD will use CPM/911 data for future agency and resource development |   |   |   |   |   | X |
| Assist NRD staff to understand the CPMs and the potential impact on policies and procedures, and specific implications for various NRD positions |   | X |   |   |   |   |
| The number of staff that understand the impact of the CPMs on current policies and procedures and their implications for various NRD positions |   |   |   |   | X |   |
| Assist NRD to develop policies and procedures and work performance standards for staff evaluation that reflect the new CPMs |   | X |   |   |   |   |
| Completed revisions or creation of policies and procedures and work performance standards |   |   |   |   |   | X |
| In partnership with NRD, provide agency-wide training on the CPMs to NRD staff |   | X |   |   |   |   |
| The number of staff that attend training  |   |   |   |   | X |   |
| **Virginia Blind** |  |  |  |  |  |  |
| WINTAC will work with DBVI to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   |   | X |
| Exploration of how to expand pre-ets service delivery through DBVI's Center for the Blind and possible electronic/online options and modalities |   | X |   |   |   |   |
| A completed assessment, analysis and recommendations for possible options for providing pre-ets statewide using the Center for the Blind as well as online or electronic options |   |   |   |   | X |   |
| Work with DBVI to develop and implement a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for pre-ets |   | X |   |   |   |   |
| A completed plan that identifies allowable expenditures and the activities and services on which the funds will be spent |   |   |   |   | X |   |
| Development and/or review of existing documentation policies and procedures for the provision of pre-ets and expenditures |   | X |   |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   | X |   |
| Develop a marketing plan inclusive of both direct and indirect strategies to increase the engagement of students/youth with disabilities receiving pre-ets and/or traditional DBVI services |   |   |   |   |   |   |
| Completed marketing plan |   |   |   |   |   |   |
| Review current interagency agreements with DBVI and SEA and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA; and develop and implement interagency agreements with LEAs |   | X |   |   |   |   |
| Completed review of agreements and development of template agreement with SEA that can be used with LEAs |   |   |   |   | X |   |
| Develop a plan to provide and expand the provision of supported employment services for students and youth that includes the expending of the 50% SE funds and 10% match |   |   | X |   |   |   |
| A completed plan |   |   |   |   |   | X |
| **Hawaii Combined** |  |  |  |  |  |  |
| WINTAC will work with DVR to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   |   | X |
| Work with DVR to develop and implement a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for pre-ets |   |   | X |   |   |   |
| A completed plan that identifies allowable expenditures and the activities and services on which the funds will be spent |   |   |   |   |   | X |
| Development and/or review of existing documentation policies and procedures for the provision of pre-ets and expenditures |   |   | X |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   |   | X |
| Review current interagency agreements with DVR and LEAs and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA |   | X |   |   |   |   |
| Completed review of agreements with the development of a template that can be used across all school districts in the State |   |   |   |   |   | X |
| Strategic planning for implementation of Section 511 | X |   |   |   |   |   |
| Strategic plan with steps identified to implement Section 511 requirements |   |   |   | X |   |   |
| Develop CC&I&R resources |   | X |   |   |   |   |
| Completed CC&I&R resources developed |   |   |   |   | X |   |
| Arrange for the provision of training on SE to DVR staff and CRPs in Hawaii to assess when SE should be provided and to develop capacity to provide SE |   |   | X |   |   |   |
| Number of individuals that attend training |   |   |   |   |   | X |
| Assist DVR in the development of MOUs with partner agencies that include all of the required elements |   |   | X |   |   |   |
| Completed MOUs |   |   |   |   |   | X |
| Assist DVR to identify processes to capture and report data necessary for the CPMs |   | X |   |   |   |   |
| Completed process-mapping; and a vision/plan for how DVR will use CPM/911 data for future agency and resource development |   |   |   |   | X |   |
| Assist DVR to develop policies and procedures and work performance standards for staff evaluation that reflect the new CPMs | X |   |   |   |   |   |
| Completed revisions or creation of policies and procedures and work performance standards |   |   |   | X |   |   |
| In partnership with DVR, provide agency-wide training on the CPMs to DVR staff |   | X |   |   |   |   |
| Number of staff that attend training |   |   |   |   | X |   |
| **Alaska Combined** |  |  |  |  |  |  |
| Peer Mentoring: WINTAC TA team will work with Alaska VR to develop a plan for the development of a custom-designed Peer Mentoring Pilot program. It is anticipated that Alaska will chose to provide these services through community providers and partners |   |   |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities; and A written plan outlining strategies and specific target dates for training. |   |   |   |   |   |   |
| WINTAC TA team will work with Alaska VR to explore the use of technology in training of staff and peer mentoring training and services to ensure the availability of program services delivery throughout the state. Content will include Alaska Specific resources and references |   |   |   |   |   |   |
| A plan to customize existing electronic training modules for both project coordinators and peer mentors reflecting Alaska’s priorities; and Evaluation plan for project coordinator and mentor training and service delivery |   |   |   |   |   |   |
| WINTAC will work with AKDVR to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   | X |   |
| Pre-ETS: WINTAC will work with AKDVR to explore and expand Pre-ETS services delivery through an online /electronic modality for students with disabilities |   |   | X |   |   |   |
| A completed assessment, analysis and recommendations for possible online or electronic options for providing Pre-ETS services to students in rural Alaska |   |   |   |   |   | X |
| Development and/or review of existing documentation policies and procedures for the provision of pre-ets and expenditures |   |   | X |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   |   | X |
| Review current interagency agreements with AKDVR and LEAs and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA |   |   | X |   |   |   |
| Completed review of agreements with the development of a template that can be used across all school districts in the State |   |   |   |   |   | X |
| Common Measures: Assist AKDVR counselors to identify relevance of data collection and reporting necessary for the CPMs |   | X |   |   |   |   |
| A completed data crosswalk matrix |   |   |   |   | X |   |
| Assist AKDVR to develop policies and procedures for staff evaluation that reflect the new CPMs |   |   | X |   |   |   |
| Common Measures: Completed revisions or creation of policies and procedures |   |   |   |   |   | X |
| Implement SARA as a pilot project statewide in Alaska with VR and Title I, II and III as a method for collecting and documenting client data necessary for CPM reporting, cross agency case management, and an improved consumer experience |   |  X |   |   |   |   |
| Alaska specific design of SARA and implementation of SARA across multiple divisions for inclusion of Titles; I, II, III and IV |   |   |   |   | X  |   |
| Strategic planning for implementation of Section 511 |   | X |   |   |   |   |
| Strategic plan with steps identified to implement Section 511 requirements |   |   |   |   | X |   |
| Expansion of integrated Business Engagement to include Customized and Supported Employment (CE & SE) strategies and inclusion of LMI training for counselors. In addition, targeted work with Alaska DVR’s assessment teams & staff to incorporate these tools |   |   | X  |   |   |   |
| Increased counselor and CRP capacity to utilize LMI, CE and SE tools and statewide expansion of existing Business Engagement Services Team (BEST) to effectively engage in businesses |   |   |   |   |   | X  |
| **Maryland Combined** |  |  |  |  |  |  |
| WINTAC will work with DORS to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   | X |   |
| Work with DORS to develop and implement a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for pre-ets |   | X |   |   |   |   |
| A completed plan that identifies allowable expenditures and the activities and services on which the funds will be spent |   |   |   |   | X |   |
| Development and/or review of existing documentation policies and procedures for the provision of pre-ets and expenditures |   | X |   |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   | X |   |
| Review current interagency agreements with DORS and LEAs and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA |   |   | X |   |   |   |
| Completed review of agreements with the development of a template that can be used across all school districts in the State |   |   |   |   | X |   |
| WINTAC will work with DORS to explore and expand pre-ets services delivery through an online /electronic modality for students with disabilities |   |   | X |   |   |   |
| A completed assessment, analysis and recommendations for possible online or electronic options for providing pre-ets services statewide |   |   |   |   |   | X |
| Assist DORS with development of a collaborative pre-ets/ transition coordination institute | X |   |   |   |   |   |
| Implementation of an annual cross-agency collaborative pre-ets transition institute |   |   |   | X |   |   |
| **Arizona Combined** |  |  |  |  |  |  |
| WINTAC will work with AZRS to develop a plan for the provision of each of the required pre-ets services through community providers, education partners, contracting staff, or VR staff |   | X |   |   |   |   |
| A written plan that identifies how each of the required services will be provided by which entity and by various modalities |   |   |   |   | X |   |
| Work with AZRS to develop and implement a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for pre-ets |   | X |   |   |   |   |
| A completed plan that identifies allowable expenditures and the activities and services on which the funds will be spent |   |   |   |   | X |   |
| Development and/or review of existing documentation policies and procedures for the provision of pre-ets and expenditures |   | X |   |   |   |   |
| A completed review of documentation policies and procedures and the provision of recommendations for any changes to ensure compliance with Section 113 of WIOA and 2CFR 200 |   |   |   |   | X |   |
| Review current interagency agreements with AZRS and LEAs and develop an updated interagency agreement with an education agency to use as a template that encompasses the required elements in WIOA |   | X |   |   |   |   |
| Completed review of agreements with the development of a template that can be used across all school districts in the State |   |   |   |   | X |   |
| Strategic planning for implementation of Section 511 |   | X |   |   |   |   |
| Strategic plan with steps identified to implement Section 511 requirements |   |   |   |   | X |   |
| Develop CC&I&R resources |   | X |   |   |   |   |
| Completed CC&I&R resources developed |   |   |   |   | X |   |
| Arrange for the provision of training on SE to AZRS staff especially related to the development of natural supports |   |   | X |   |   |   |
| Number of individuals that attend training |   |   |   |   |   | X |
| Assist AZRS to identify processes to capture and report data necessary for the Common Performance Measures (CPMs) |   | X |   |   |   |   |
| Completed process-mapping; and a vision/plan for how AZRS will use CPM/911 data for future agency and resource development |   |   |   |   |   | X |
| In partnership with AZRS, provide agency-wide training on the CPMs to AZRS staff that focuses on how the CPMs affect the counseling process and client planning |   | X |   |   |   |   |
| The number of staff that attend training |   |   |   |   |   | X |
| Assist AZRS to develop policies and procedures and work performance standards for staff evaluation that reflect the new CPMs |   | X |   |   |   |   |
| Completed revisions or creation of policies and procedures and work performance standards |   |   |   |   |   | X |

**Workforce Innovation Pilot Projects (WIPPs)**

 There has been major progress on the WIPPs that were planned for the WINTAC. The Career Index Plus (TCI+) has been piloted in South Carolina Blind and is being rolled out nationally, with a phased-in approach. Idaho, Colorado and Kentucky will be part of the second phase of the roll-out, with seven states following these three, and then all 80 VR programs will have access. The WINTAC was awarded a supplement that will be used to provide a much deeper level of training to VR agencies in Year Two than was originally planned. In addition, we will be establishing ten communities of practice (one in each region), that will consist of TCI+ users that will become adept at using TCI+ and that can act as trainers for the programs, helping to ensure that the use of LMI is infused in the VR process in the future. The TCI+ training is being conducted in partnership with the JDVRTAC, who will be conducting the ethical and clinical practice training piece, which applies not only to TCI+, but LMI generally. This component will help to ensure that TCI+ users will use the information to enhance informed choice.

 The SARA pilot project is well ahead of schedule. We have identified the three pilot sites, which includes Kentucky, Nevada and Alaska (three active intensive TA states). We are meeting with these VR program administrative staff and IT staff over the course of the next two months to initiate the pilot. All three States were recipients of the TEGL grants, and wrote the use of SARA statewide into their grant proposals. This is an exciting development and will allow us to use the pilot projects as a way to get the projects up and running in time for statewide implementation.

 The peer mentoring pilot is active in Alaska, putting this project well ahead of schedule. Utah was also recently confirmed as the second pilot site. Maryland expressed interest in becoming the third site, so we may end up being a year ahead of schedule in implementing this project.

**Collaboration with other TACs**

 The WINTAC has been very active in collaborating with other TA Centers in planning and implementing TA. Some of the collaborations include:

* Partnering with the JDVRTAC to coordinate and run the monthly technical assistance center collaborative (TACC) calls;
* Developing intensive TA agreements with several different TACs, most frequently with the Y-TAC, but the NTACT, JDVRTAC, PEQA and DEI centers were also included;
* Partnering with the JDVRTAC to deliver TCI+ training;
* Function as the liaison for the TACs to the NCRTM;
* Partnering with the Y-TAC to develop customized employment training as a national certificate that will be available to VR programs and CRPs nationally; and
* Partnering with the Y-TAC to develop resources for pre-employment transition services and other youth services electronically.

The WINTAC will continue to work closely with the other TACs as we develop intensive TA plans and begin projects to serve our VR customers. Several of our pending or planned intensive TA agreements are collaborations with other TACs, and it is becoming the norm to have at least one other TAC as a partner in every agreement.

**Section 2: Review of Application and Cooperative Agreement**

No changes identified at this time

**Section 3: Work Plan**

 The Year Two work plan is contained in Table 14 below. The edits/additions to the work plan from the plan submitted at the beginning of the project include the removal or revision of objectives reached and the inclusion of the customized employment and electronic pre-employment transition services resources that will be developed with carry-over funds. The Career Index Plus pilot project was revised to include the increased training available through the supplement funds. The SARA and peer mentoring pilots were revised to include the identified SVRAs for each pilot that are known to date.

**Budget and Narrative**: Please see Part C below.

**Person Loading Chart for Year 2 and beyond**: Please see attachment

**Subcontracts**: Each of the subcontracts for Year two is being completed and will be sent the Project Officer upon completion.

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| **Table 14****Goal: To assist SVRAs and related agencies and professionals to successfully meet the requirements of WIOA** |
| **Objective 1**: Develop knowledge that will assist SVRAs and related professionals and agencies to meet effectively meet the requirements of WIOA |
| **Activities** | **Milestone - Outcomes** |  |
| **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Add to the literature review on evidence-based and promising practices in the five topic areas as they are identified and/or developed | Completed literature review | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** SDSU-CC, CK, LO and FS; NDI-DK; GW-MMK and MD; UA-JM and SO; CSAVR - WDC; PW-BB |
| Continue to develop and refine tool kits for all five topic areas  | Five curriculum guides completed with regular updates  | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** SDSU - Topics 2&3; NDI/LEAD Center - Topics 4&5; UA - Topics 3&4; GW - Topics 1 & 2; PW - Topics 4&5 |
| **Objective 2:** Provide technical assistance and dissemination activities to SVRAs and related agencies and rehabilitation professionals related to the five topic areas to help them develop the skills and processes needed to meet the requirements of WIOA. |
| Continue to provide intensive TA to the nine SVRAs with active agreements developed in the first year: Complete the intensive TA agreements and provide intensive TA to the five pending SVRAs in Year Two; develop the intensive TA agreements with four other VR agencies and begin providing intensive TA. | Nine active agreements sustained; 9 new agreements developed and signed by the SVRAs | at least 9 SVRAs | at least 7 SVRAs | at least 7 SVRAs | TBD |
| **Responsible Entity and Person(s):** SDSU - Topics 2&3; NDI/LEAD Center - Topics 4&5; UA - Topics 3&4; GW - Topics 1 & 2; PW - Topics 4&5 |
| A broad range of targeted, specialized and universal TA is provided to SVRAs and related professionals to effectively respond to the changes required by WIOA | State-of-the art IT platform continuously populated with information to assist SVRAs in responding to WIOA | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** SDSU- CDL |
| Grow the Career Index Plus pilot project through phases to national access and usage | Three SVRAs trained, then seven, then all SVRAs | Q 1-4 | Q 1-4 | Q 1-4 | Q 1-4 |
| **Responsible Entity and Person(s):** Career Index – KDN |
| Implements the SARA pilot project in Kentucky, Nevada and Alaska | SARA fully operational in all three SVRAs | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** Career Index – KDN |
| Implement the peer mentoring pilot project in identified SVRAs | Peer mentoring established in four sites, starting in Alaska and Utah. Two other sites to be determined | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** Policy Works – BB |
| Develop a customized employment national certificate that will be available to SVRAs and CRPs to develop capacity, ensure consistency and fidelity of service delivery, and increase the quantity and quality of employment outcomes for individuals with the most significant disabilities | A national certificate is developed and made available to SVRAs and CRPs | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** SDSU - CC and CK |
| Develop online/electronic resources to provide to SVRAs that will help them deliver the five required pre-employment transition services | Fully developed online/electronic resources that are available on the WINTAC website | Q1-4 | Q1-4 | Q1-4 | Q1-4 |
| **Responsible Entity and Person(s):** GW - MK, MD and CJ |
| Objective 3: Coordinate activities between SVRAs and their partners to assist in their effective response to the requirements of WIOA. |
| Establish CoPs in each of the five topic areas that act as vehicles for communication and exchange of information | CoPs established and functioning | Q 1-4 | Q 1-4 | Q 1-4 | Q 1-4 |
| **Responsible Entity and Person(s):** SDSU - Topics 2&3; NDI/LEAD Center - Topics 4&5; UA - Topics 3&4; GW - Topics 1 & 2; PW - Topics 4&5 |
| Communicate, coordinate and collaborate with other DOE, DOL, DOC, HHS funded projects to support learning and KD and KT. | Number of related TACs and other projects contacted and engaged | Q 1-4 | Q 1-4 | Q 1-4 | Q 1-4 |
| **Responsible Entity and Person(s):** Project Directors from each partner |
| Maintain ongoing communication with RSA project officer and other RSA staff as required | Frequency of communication and number of staff from RSA engaged | Q 1-4 | Q 1-4 | Q 1-4 | Q 1-4 |
| **Responsible Entity and Person(s):** Project Directors from each partner |