

Workforce Innovation Technical Assistance Center

**FORMATIVE AND SUMMATIVE EVALUATION: YEARS 1 & 2
DECEMBER 21, 2017**



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II. Executive Summary

The Workforce Innovation Technical Assistance Center (WINTAC) provides training and technical assistance (TA) to State Vocational Rehabilitation Agencies (SVRAs) and related agencies and rehabilitation professionals and service providers to help them develop the skills and processes needed to meet the requirements of the Workforce Innovation and Opportunity Act (WIOA). The WINTAC offers three types of TA: (1) intensive, sustained TA, (2) targeted, specialized TA, and (3) universal, general TA in five key areas: (1) Pre-Employment Transition Services, (2) Section 511, (3) Competitive, Integrated Employment, (4) Integration of VR into the Workforce Development System, and (5) Common Performance Measures, along with Workforce Innovation Pilot Programs and Special Projects.

This report documents the findings of the program evaluation for the first two years of WINTAC implementation, with emphasis on formative issues and short-term outcomes given the early stages of progress to be expected at this juncture.

In Year 1 an aggregation across conceptual programmatic and conceptual evaluation frameworks yielded an integrated set of principles by which WINTAC's formative structure and progress could be evaluated. Using those principles (*understanding SVRA context, ensuring stakeholder engagement, and assessing needs*), Year 1 and 2 evaluations find WINTAC to be making strong progress. These principles were met both at the time of the proposal and continue to be important as WINTAC implements its activities in all areas. The partnerships that drive and support stakeholder engagement and inform WINTAC of current needs remain vibrant.

A comparison of stakeholders' articulated needs (from the collaborative needs assessment conducted in Year 1 by PEQA-TAC on behalf of TACs) and the nature and amount of WINTAC services across topic areas clearly demonstrates that WINTAC is meeting needs and providing

services beyond those which were even anticipated by the SVRAs themselves – notably, the need for Pre-ETS.

And finally, an initial examination of collective impact achieved by WINTAC demonstrates the effective architecture and relationships in place for the partners that form the WINTAC to be successful in progressing WIOA implementation nationally and increasing best practices by SVRAs to increase employment outcomes for their clients in a way that exceeds what any individual entity would have been able to do operating independently. Future evaluations of collective impact by the WINTAC will examine and highlight the strategies it is using to deal with the highly complex ecosystem of VR services, particularly with the rapidly changing economic and regulatory context within which WINTAC and SVRAs operate.

As the gateway to Universal TA, it is important to ensure the WINTAC's website is effective in providing information that stakeholders need and which they ultimately use. Now that the WINTAC has completed two years of implementation and conducted extensive personal outreach through dedicated subject matter and regional TA representatives, it is clear fewer requests for TA are coming through the website itself, so the pace has decreased from Year 1 (but enough come through that it is important to leave the mechanism for requesting TA through the website available).

Website traffic statistics showed an increase each quarter in terms of unique visitors, page views, and visits/session and a steady pace for returning visitors, new visitors, pages viewed per session and duration per session. Cumulatively, since going online in October of 2015, the WINTAC website has had 21,795 visitors with 18,435 returning (85%) – a strong return rate demonstrating that stakeholders indeed view WINTAC as an important and trustworthy resource

for information, updates, and assistance. As in Year 1, Year 2 saw the highest demand for information related to Pre-ETS.

Stakeholder evaluations for the website are done in two ways: (1) through a button on the website that allows visitors to evaluate the specific page they are viewing and (2) through follow-up surveys we send to individuals who conducted the web-page evaluations. Both forms of evaluation demonstrated positive experiences, with the majority of individuals predicting they would use the information for “general knowledge development.” Very preliminary data from the follow-up surveys demonstrates that use across categories is occurring, including “implementation of specific activities.”

WINTAC has provided over 1,000 instances of targeted TA with 50 SVRAs throughout Year 2 through webinars, live trainings, calls and emails. The most common topic area was Pre-ETS followed by common performance measures. Eleven of the 50 SVRAs that received targeted TA developed intensive TA agreements with WINTAC over the course of Year 2, with two more under development. Agencies and organizations other than SVRAs, such as State Departments of Education and CRPs, also made a few requests for WIOA related targeted TA. Participants expressed high levels of satisfaction with trainings provided immediately following the trainings as well as in follow-up evaluation surveys conducted over 6 to 12 months after the trainings. Participants have also started putting the knowledge gained through the targeted TA trainings into action at their agencies. Suggestions for future improvements include making the training sessions longer time to allow more time to go over the materials, opportunities for ongoing and continuous learning, and getting more practical knowledge through other agencies’ practices or hands-on learning. Community of Practice distribution lists collectively number at

2,745 and robust plans for evaluation have been outlined and will be collaboratively finalized for implementation in Year 3.

WINTAC is implementing 21 intensive TA agreements signed with 23 SVRAs. Eighty-three percent of the agreed-upon activities have been initiated, and close to a third are complete. Evaluation of activities over the course of Year 2 shows steady incremental progress towards achieving the short-term outcomes for each topic area. In most cases, SVRAs and WINTAC topic area teams are still collecting data that will be used as measures to determine if intended outcomes have been met. The preliminary data and information available shows that SVRAs are trying to take targeted steps to fill areas where they are lagging such as developing targeted spending plans and improving agency capacity and resource to achieve expected outcomes.

WIPPs and Special projects offer WINTAC an opportunity to engage in focused activity in innovative areas, using innovative techniques and technology, and to elevate the evaluations of impact associated with WINTAC's primary topic areas. Year 2 saw the development of robust plans of evaluation for several of these areas, notably SARA and the Integration Continuum Tools. Efforts and discussions have already begun to reshape some activities and features of tools being provided, a reflection of WINTAC's commitment to continuous quality improvement. Year 3 will see further progress with SARA and the Integration Continuum tools, and implementation in other areas as well. As noted in the description of plans, this work provides a strong opportunity for an integrative perspective to the work of the WINTAC by drawing connections in impact across topic areas and special initiatives.

WINTAC's performance demonstrates its unmitigated commitment to providing the highest level of service to any SVRA that needs it. Meeting the minimum requirements is the least of any TA Specialist's concern. WINTAC staff are driven to ensure WIOA implementation

is effective, and most importantly, impactful. WINTAC's WIPPs and Special Projects also highlight this level of commitment. When the tools to implement or measure WIOA implementation are not available or are insufficient, WINTAC staff develop, validate, improve, and provide them. Resources developed will not only have value for states currently receiving intensive TA, but the field of vocational rehabilitation, workforce development, and disability employment at large.

III. Introduction

The Workforce Innovation Technical Assistance Center (WINTAC) provides training and technical assistance (TA) to State Vocational Rehabilitation Agencies (SVRAs) and related agencies and rehabilitation professionals and service providers to help them develop the skills and processes needed to meet the requirements of the Workforce Innovation and Opportunity Act (WIOA). Led by the Interwork Institute at San Diego State University, the WINTAC is a collaboration of the National Disability Institute and their LEAD Center, the George Washington University's Center for Rehabilitation Counseling Research and Education, the University of Arkansas CURRENTS, PolicyWorks, the Career Index, the Council of State Administrators of Vocational Rehabilitation, and the Burton Blatt Institute at Syracuse University. The WINTAC is funded by a five-year grant from the Rehabilitation Services Administration. The WINTAC focuses on five topic areas:

- Pre-ETS: Provision of pre-employment transition services to students with disabilities and supported employment services to youth with disabilities;
- Section 511: Implementation of the requirements in section 511 of the Rehabilitation Act that are under the purview of the Department of Education;
- Competitive Integrated Employment (CIE): Provision of resources and strategies to help individuals with disabilities achieve competitive integrated employment, including customized and supported employment;
- Integration of the State VR program into the workforce development system; and
- Common Performance Measures (CPM): Transition to the new common performance accountability system under section 116 of WIOA, including the collection and reporting of common data elements.

The WINTAC engages in three categories of activities: knowledge development activities, technical assistance and dissemination activities, and coordination activities. Its primary focus is on providing TA for each topic area. The WINTAC offers three types of TA: (1) intensive, sustained TA, (2) targeted, specialized TA, and (3) universal, general TA. Partners with a lead role in the five topic areas are responsible for providing TA to SVRAs and their partners in that topic area, with support and in concert with the partners that have a supportive role in the identified topic area.

This report documents the findings of the program evaluation for the first two years of WINTAC implementation, with a primary focus on Year 2 (with the first half of Year 1 involving start-up activities, some of the summative data from Year 1 pertaining to universal technical assistance has been aggregated with Year 2 to provide a more comprehensive examination). In these first years of implementation, the emphasis of the evaluation is on formative issues: it focuses on the initiation of the WINTAC, the establishment of organizational structures and processes to facilitate its operation, and the approaches to service delivery the WINTAC has taken. It also documents the nature, range, and beneficiaries of activities undertaken. Patterns of customer engagement, knowledge development, and customer reflection to inform continuous quality improvement are also presented. This reflects the early stages of the logic model guiding the WINTAC. The end of Year 2 brings the WINTAC closer to the mid-point of the grant cycle, also allowing for some preliminary assessment of short-term outcomes.

IV. Evaluation Methods and Sources

The evaluation staff are represented on the WINTAC Leadership Team and participate in all Leadership Team conference calls and in-person meetings. The evaluation thus includes first-hand observation of the team's performance through participation in activities with them. In addition, this evaluation uses materials and communications produced by the WINTAC in the conduct of its activities and formal reporting and tracking data. In Year 1, materials reviewed included quarterly reports, google analytics, needs assessment data, the TA tracking system, the WINTAC Google drive folder, meeting notes, draft and final TA agreements, and follow-up Targeted TA training evaluations. In Year 2, additional sources of data included webpage evaluations and follow-up surveys of webpage visitors, follow-up surveys of recipients of targeted TA, and TA Team provided responses on the output and outcome tracking spreadsheet. Year 2 has also brought additional progress on the development and implementation of individual plans of evaluation for the topical areas that reflect a specialized approach tailored to specific subject matter areas and projects (e.g., development of the integration continuum assessment tool, SARA evaluation, and other areas).

As described in the Year 1 report, formative evaluation questions were developed based on the collaborative partnerships forming the WINTAC itself, as well as theoretical frameworks grounding its approach to services and evaluation and summative evaluation questions were developed based on the workplan, expected deliverables, and the nature and types of services being provided by the WINTAC.

A. Theoretical Frameworks Guiding WINTAC Structure and Services

Three key conceptual frameworks or theoretical approaches, as well as additional evidence-based approaches and strategies inform the structure and services of the WINTAC.

These frameworks guide the formative evaluation of the WINTAC; although critically important to laying the foundation down for WINTAC establishment in early years, an evaluation of WINTAC's incorporation of principles from these frameworks will be conducted in all years. These frameworks include (1) Bryson's (2011) model for organizational planning and systems change emphasizing early and ongoing planning discussions that include stakeholders and clear definitions of inputs, outputs, and outcomes as defined by the use of logic models; (2) the Quality Enhancement Research Initiative (QERI) (Stetler, McQueen, Demakis & Mittman, 2008) noting the importance of identifying cultural norms, capacity, and supportive infrastructures to ensure change efforts fit into or modify those constraints (Van Achterberg, Schooven & Grol, 2008); (3) Bolman & Deal's (2013) Four Frames Model advocating integration across four key pillars (structural, human resource, political and symbolic frames); and (4) principles from adult learning and implementation science emphasizing evidence-based approaches to tailoring TA (Bryan et al., 2009; Knowles, 2006; Odom, Cox & Brock, 2013).

B. Theoretical Frameworks Guiding WINTAC Evaluation

In addition to the conceptual, theoretical, and evidence-based frameworks reviewed above which guide the approach to WINTAC's structuring and provision of TA services, the WINTAC turns for guidance to other models when implementing knowledge translation / dissemination strategies for universal TA and when evaluating its impact. With an emphasis on performance feedback and continuous quality improvement, the WINTAC evaluation draws from (1) several effective evaluation practices including Utilization Focused Evaluation, Stakeholder Based Evaluation, and Real World Evaluation (Bamberger, Rugh, & Mabry, 2006; Cousins & Earl, 1992; Patton, 2008; Rossi et al., 2004); (2) the Knowledge-to-Action framework (Graham et al., 2006); (3) and The Collective Impact Model (Kania & Kramer, 2011). The

formative and summative evaluation techniques examine “how well the WINTAC is working” and “what difference the WINTAC is making,” key questions identified by all evaluation models.

i. Logic Model and Theories of Change

The WINTAC and its evaluation are guided by a logic model that outlines in broad strokes the inputs (partnerships and expertise that form the backbone and resources available to WINTAC), activities (from knowledge development to all levels of training and technical assistance), outputs (from reports to curricula to communities of practice), and to outcomes (short-, mid-, and long-term). Figure 1 below represents the logic model as it was co-developed by partners (representing stakeholders) at the time of the proposal. In the first two years of WINTAC operation, this logic model has continued to be applicable and relevant.

Though some suggest that logic models and theories of change are the same, others have argued a theory of change represents a far more detailed understanding of causal links between program activities and outcomes achieved (De Silva, Breuer, Lee, Asher, Chowdhary, Lund, et al., 2014) and that logic models are more of an overview and tool for conducting summative evaluation that tracks results, usually for funders (Prinsen, & Nijhof, 2015). WINTAC’s mandate and scope of work is vast and broad, preventing an adequate one-size captures all framing or universal theory of change. Instead, its logic model is parsimonious and high-level and intended to evolve towards greater detail and specification. This evolution is primarily occurring through the development of several logic models for each of its specified subject matter areas, with details additionally identified in intensive TA agreements developed collaboratively with SVRAs and other TACs. These more specified and expansive models may be more appropriately

considered theories of change and are reviewed in the section below analyzing progress of intensive TA activities by subject matter area.

Increasing SVRA Skills & Processes, Implement Significant New Activities, Collaborate With Workforce Development System, And Meet Requirements Of WIOA			
Partners/Inputs	Activities	Outputs	Short/Mid Outcomes
SDSU-II, CSAVR, GU, NDI-LEAD, BBI, SMEs' <u>Expertise:</u> *State & Federal VR Program and Practices *Existing Capacity, Needs, & Resources of SVRAs *WIOA and the Rehabilitation Act *Workforce Development System *Pre-employment transition services *Customized & Supported Employment *Common Performance Accountability System *Adult Learning Principles *Implementation Science *Evaluation	<u>Knowledge Development:</u> *Needs Assessment of all SVRAs & surveys of all stakeholders *Systematic review of literature, RSA monitoring reports, RSA-911 data, DOE and DOL policies and guidance, and SVRA MOUs/MOAs <u>Training & TA:</u> *Intensive sustained TA *Targeted specialized TA *Universal TA *Training on collaboration with Workforce Dev. System *Training on performance accountability system, Career Index Plus & Career GPS *Webinars on emerging & best practices Create: *Collaborations through peer mentor networks, 5 CoPs *IT platform	*Public reports of evidence-based and promising practices *Documentation of existing SVRA capacity and needs for training & TA related to WIOA *5 Curriculum guides for SVRA training *5 Communities of Practice *Comprehensive Evaluation Report in Year Three, with standard reports in other years and a summative report in Year Five	*Increased skills of SVRAs to meet WIOA requirements *Enhanced SVRA processes to meet WIOA requirements *Increased pre-employment transition services to SWD *Increased supported employment services to YWD *Implementation of Section 511 of the Rehabilitation Act *Increased access to supported employment and customized employment supports for youth and adults with MSD *Implementation of new common performance accountability system.
<u>Long-term Outcome:</u> Improved and increased competitive integrated employment outcomes for VR clients due to increased and improved service delivery and collaboration with the workforce development system as a result of innovative, WIOA-focused employment strategies.			

Figure 1. WINTAC Logic Model

V. Formative Evaluation Focus Areas and Findings

In this first year, the emphasis of the evaluation is on formative issues: the coming together of partners to create the consortium that serves as the WINTAC, the establishment of organizational structures and processes to facilitate its operation, and the approaches to service delivery the WINTAC has taken. While it is too early for most outcomes to have manifested, the WINTAC had a workplan in place for its first year that delineated specific activities and outputs and an accounting of the achievement of those objectives thus far is conducted in the following section on Summative Evaluation.

A. Implementing Conceptual, Theoretical, and Evidence-Based Frameworks

Several different frameworks inform both the services and evaluation of WINTAC as reviewed above. Across those theoretical models, conceptual frameworks, and evidence-based approaches are articulated several constructs or elements, with each model or framework having its own terms of art. Despite the differences in nomenclature, we find these elements are defined similarly and thus represent a consensus in the literature on core issues that impact a successful approach to constructing a multi-partner center and providing effective, impactful services resulting in change. An analysis conducted for the Year 1 report revealed the following core issues: (1) Context: the values, cultures, norms, infrastructures, human resource capacity, politics, and symbolic environments in which constituents operate, (2) Engagement: the degree to which constituents, as key stakeholders, are a part of the development of plans for what services will be delivered, how they will be delivered, and how services will be evaluated, and (3) Assessment of Need: surveying one's constituents to determine their priority areas of need so that expertise is matched and provided appropriately.

Year 1 findings indicated a strong integration of all principles throughout WINTAC's operation. "*Context*" of SVRAs was a part of the planning process for the WINTAC during its proposal stage through partnership with individuals from organizations who have worked with and/or provided services previously to SVRAs, as well as CSAVR who is the guild agency representing the interests of SVRAs nationally.¹ These partnerships have continued from the proposal phase to Year 1 and Year 2 of WINTAC's operation ensuring a continuous process of reevaluating the context within which SVRAs operate – an important consideration given the changing landscape of regulations, funding, and mandates at the state and federal levels (particularly the ongoing regulations resulting from WIOA implementation).

"*Context*," "*engagement*," and "*assessment of need*"²³ were also built in to the very process of TA provision itself and continue to be important in Year 2 through the collaborative process of both drafting the intensive TA agreements and conducting ongoing updates. WINTAC intensive TA agreements have been structured to ensure all elements are addressed and documented.⁴ These agreements are not static contracts; rather, it is important to note that they can be iterative and ongoing and be amended to become consistent with changing SVRA needs and resources when significant changes occur and expectations for outcomes become

¹ These groups are, represent, and/or serve stakeholder populations including youth and adults with disabilities; ethnically and geographically diverse groups with disabilities; rehabilitation professionals; administrators and executives; workforce development professionals; and researchers.

² In year 1 a baseline needs assessment was conducted of all 80 SVRAs. Data relevant to WINTAC was analyzed for the Year 1 Formative Evaluation Report.

³ WINTAC has commendably operationalized a distinction between "*engagement*" and "*assessment of need*." Though these elements have clear overlap when done well (assessing need through direct contact with affected stakeholders, rather than through use of secondary source reports only), perfect overlap would mean not only redundancy but also sub-optimal or superficial interaction with stakeholders. Rather, "*engagement*" must mean more than reporting on need (and later on satisfaction); "*engagement*" must also mean the involvement of stakeholder voices in the development of service plans and the ways in which to assess their efficacy or utility. In this way, "*engagement*" entails full participation and enhances relevance for targeted audiences.

⁴ Indeed, the template for the intensive TA agreements follows a logic model approach adapted from the 2004 Kellogg Foundation's Logic Model Development Guide.

further clarified. Indeed, as described more fully below, intensive TA agreements drafted at the very start of WINTAC are more variable (even within the same subject matter area) than now, demonstrating a growth in understanding between both SVRAs and WINTAC staff about critical needs to be addressed, services best addressing them, and common expectations for outputs and outcomes that are both reasonable and important to achieve.

B. Achieving Collective Impact

Collective impact is a way to examine whether social sector initiatives can coordinate across sectors and, involving multiple partners and systems, create large-scale social change and impact better than individual organizations. Based on Kania and Kramer's (2011) articulation, collective impact is successful when five specific conditions are met: (1) there is a common agenda, (2) there is a shared management system, (3) there are mutually reinforcing activities, (4) there is continuous communication, and (5) there are backbone support organizations for the overall initiative.

In its first two years, WINTAC represents a successful implementation of these five guiding principles. *(1) Common Agenda:* RSA's expectations for WINTAC set the foundation for the common agenda that is proscribed by the provision of funding to SDSU and its partners. These expectations involve provision of services in five core subject matter areas (see Section II. Introduction), but also involve special projects. *(2) Shared Management:* SDSU has created multiple mechanisms and platforms for shared management involving information technology solutions (e.g., a common email system, online document sharing and archiving, and online reporting of activities amongst others), as well as leadership-based systems whereby each partner is represented on a leadership team and has primary responsibility for either a subject matter area or a jurisdictional area. *(3) Reinforcing Activities:* As a team, WINTAC brings an extensive

depth of expertise across a breadth of subject matter relevant to disability employment including, but not limited to, rehabilitation counselor training, continuing education, and leadership; cross-agency partnering and collaborations; serving populations in transition, across the spectrum of disability, and across diverse geographic and ethnic populations; career pathways; supporting SVRA systems change efforts; knowledge translation and knowledge brokering of innovative and evidence-based best practices; implementation of Communities of Practice and Peer Mentoring Networks; development and use of electronic tools supporting SVRA provision of services, administration, case management, access to career information, and other activities; and program evaluation. This expertise is shared across subject matter areas, rather than divided up piecemeal into silos. Additionally, subject matter areas blend naturally into one another and leverage knowledge gained from one area to support implementation in another. One example is the connection between improved integration (one area) supporting reporting of common performance measures (another area). States that are piloting *The Career Index Plus* also benefit from a tool to support improved integration and reporting. Thus, different teams of the WINTAC work together to provide universal, targeted, or intensive technical assistance seamlessly and collaboratively ensuring both effective service provision to SVRAs, but also (importantly for SVRAs), efficient service provision. This commitment to collaborative and reinforcing activities is also seen in the way “joint” intensive technical assistance activities are carried out between the WINTAC and other TACs funded by RSA which may have partially overlapping foci (e.g., JDVRTAC, Y-TAC and NTACT). (4) *Continuous Communication:* SDSU has established multiple standard channels for ongoing and regular communication and strategic decision-making through shared management systems as described above, and regularized meetings which take place for all teams every two weeks virtually and twice a year

in-person. In addition, subject matter teams have ongoing meetings to organize their work and are regularly joined by staff from SDSU. (5) *Backbone Support*: SDSU serves as the backbone to a cohesive set of partners who function as one entity and have become more than the sum of their individual parts.⁵ WINTAC is not a loose collaboration of disparate entities providing services in a silo. Rather, partners are all actively and continuously engaged as part of a leadership group, ensuring the inputs of resources and expertise into the WINTAC is as needed on an ongoing basis. SDSU provides core funding for WINTAC-related activities to all partners and requires defined workplans, and updates shared on teleconferences, online via management systems, during in-person meetings, and as part of documented update reports. As such, SDSU ensures consistent engagement with WINTAC's defined mission and is able to adapt to a changing environment as informed by its partners.

WINTAC has been structured by SDSU and implemented collectively by SDSU and partners to integrate all five key elements of successful collective impact. Over the course of Year 3, we will continue to examine achievement of collective impact by examining emergent principles to address the significant complexity inherent in WINTAC's mission (Kania & Kramer, 2013) and assessing specific indicators under each of the five key elements.

C. Meeting Needs

As reviewed earlier, all 80 SVRAs were surveyed in Year 1 to determine their need for various services from the several TACs funded by RSA. Data from this survey relevant to WINTAC were summarized in the Year 1 report. Here, we map the needs identified to the

⁵ In addition to the partnerships that create the WINTAC, there are further collaborations or partnerships that have been developed between the WINTAC as a whole and other groups. These collaborations stem from: (1) a recognition of the substantially high performance of the WINTAC in a short period of time and its strong leadership in the field, (2) a significant need by a major segment of SVRAs for assistance related to WIOA, and (3) overlap between the expertise provided by WINTAC and that provided by other TACs.

breadth of services provided thus far by WINTAC to examine the degree of needs being met.⁶

As a reminder, these findings represent the needs articulated by 53 of the 80 SVRAs who responded to the survey, representing a 65% response rate.

Respondents were asked to identify their level of need for TA in each of the topic areas of the WINTAC along a four-point scale: none, low, medium, and high. If ambivalent or uncertain, respondents could also select “unsure,” though in practice very few did. Except for the topic area of common performance measures, the other four areas each garnered about a third of respondents expressing a “high” need. Collapsing the four levels of need, by combining “none” with “low” and combining “medium” with “high,” yields a clearer way to distinguish which topic areas seem to be of higher priority for respondents. Table 1 below presents the reflection of need according to this structure, and compares it to the nature of services currently being provided by WINTAC through targeted TA activities and intensive TA agreements.

Table 1. Needs and Services Provided by WINTAC by Topic Area

Topic Area	Year 1 Expressed Level of Need	WINTAC Targeted TA Activities	WINTAC Intensive TA Agreements
Pre-Employment Transition Services	18%	82%	86%
Subminimum Wage	38%	30%	52%
Competitive, Integrated Employment	35%	32%	67%
Integration of VR into WDS	37%	30%	43%
Common Performance Measures	41%	50%	67%

⁶ It is important to note that a lack of 1:1 correspondence between needs articulated in the Year 1 assessment and the current list of services in progress by WINTAC does not reflect a failure to meet needs. WINTAC has three more years to provide services and needs may have changed. Survey responses anticipating need in the face of a changing regulatory environment where some mandates have not been clarified are in fact likely to significantly alter as regulations are clarified.

D. Summary

In Year 1 an aggregation across conceptual programmatic and conceptual evaluation frameworks yielded an integrated set of principles by which WINTAC's formative structure and progress could be evaluated. Using those principles (*understanding SVRA context, ensuring stakeholder engagement, and assessing needs*), Year 1 and 2 evaluations find WINTAC to be making strong progress. These principles were met both at the time of the proposal and continue to be important as WINTAC implements its activities in all areas. The partnerships that drive and support stakeholder engagement and inform WINTAC of current needs remain vibrant.

A comparison of stakeholders' articulated needs (from the collaborative needs assessment conducted in Year 1 by PEQA-TAC on behalf of TACs) and the nature and amount of WINTAC services across topic areas clearly demonstrates that WINTAC is meeting needs and providing services beyond those which were even anticipated by the SVRAs themselves – notably, the need for Pre-ETS.

And finally, an initial examination of collective impact achieved by WINTAC demonstrates the effective architecture and relationships in place for the partners that form the WINTAC to be successful in progressing WIOA implementation nationally and increasing best practices by SVRAs to increase employment outcomes for their clients in a way that exceeds what any individual entity would have been able to do operating independently. Future evaluations of collective impact by the WINTAC will examine and highlight the strategies it is using to deal with the highly complex ecosystem of VR services, particularly with the rapidly changing economic and regulatory context within which WINTAC and SVRAs operate.

VI. Summative Evaluation Focus Areas and Findings

A. Universal Technical Assistance

i. Website Resources

The WINTAC website serves as the main gateway for providing Universal TA to SVRAs and other relevant organizations. Materials uploaded to the WINTAC website for Universal TA include a mix of peer-reviewed journal articles and other publications, fact sheets, government reports, webinars, links to self-paced training courses, laws and regulations, and policy documents.

In the Year 1 Evaluation Report, the characteristics of the Universal TA provided were assessed and reported in terms of choice and flexibility, access, cumulative knowledge and skill building, accessibility, innovative interactive challenges, and continuous quality improvement. This year, the report addresses traffic and website generated contacts to WINTAC, as well as feedback obtained from WINTAC website visitors through (1) webpage evaluations and (2) follow-up surveys of webpage evaluators.

ii. WINTAC Contacts Through Website

State VR agencies and other groups can reach out to WINTAC by phone, email or in-person for universal TA requests. Table 2 shows the number of requests that the WINTAC received and responded to in Year 1 by type of request:

Table 2. Number of non-intensive and targeted TA requests via website in Year 1 and 2

Type	Year 2 Quarter One	Year 2 Quarter Two	Year 2 Quarter Three	Year 2 Quarter Four	Year 2 Total
Pre-ETS	2	4	1	3	10
Section 511 implementation	4	4	3	1	12
Customized and supported employment	-	1	2	-	3
Integration of VR into the Workforce Development System	-	1	1	3	5
Common performance measures	1	-	2	2	5
Other (WIPPS)	1	3	1	-	5
Total	8	13	10	9	40

iii. WINTAC Website Traffic

WINTAC regularly tracks website usage data using Google Analytics to understand traffic volume as well as trends in usage over time. Website traffic statistics showed an increase each quarter in terms of unique visitors, page views, and visits/session and a steady pace for returning visitors, new visitors, pages viewed per session and duration per session as shown in Table 3.

Table 3. Website Traffic Data for Year 2

Metric	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Unique Visitors	2, 889	4, 689	4, 569	6, 312
Page views	17, 996	32, 535	30, 231	39, 638
Visits/Sessions	4, 848	8, 261	7, 766	10, 654
Returning visitors	46%	47%	48%	47%
New visitors	54%	53%	52%	53%
Pagers per session	3.7	3.9	3.9	3.7
Average duration per session	3 min. 52 sec.	3 min. 51 sec.	3 min. 59 sec.	3 min. 48 sec.

Cumulatively, since going online in October of 2015, the WINTAC website has had 21, 795 visitors with 18, 435 returning (85%) – a strong return rate demonstrating that stakeholders indeed view WINTAC as an important and trustworthy resource for information, updates, and

assistance. There were a total of 39,924 entrances to the website, ranging from 1 to 565 with 153 days of “100+” entrances and an overall daily average of 86 entrances. Once again, this data buttresses the interpretation that stakeholders are coming to WINTAC as a trusted resource for WIOA information that they need. Data from page views is similarly high, indicating that stakeholders are staying with the website and browsing it for information rather than coming to the site and leaving right away; to wit, the total page views is 154,111 (ranging from 1 to 1,304) with an average of 330 page views per day.

Another way to examine website traffic is by days of particularly high intensity. These patterns may be explicable by considering the importance of the day to the stakeholder (e.g., an upcoming implementation date for a WIOA regulation may drive information-seeking to ensure compliance) or an outreach effort of WINTAC or a related entity (e.g., CSAVR or RSA). Table 4 below examines two different ways of looking at high intensity traffic days: the top 10 days of highest page entrances and the top 10 days of page views. Looking at time-based trends in yet another way, the following weeks had either 3 to 5 consecutive days in the “top 50” of page visits:

- ❖ 7/17/2017 (5)
- ❖ 7/24/2017 (4)
- ❖ 1/30/2017 (4)
- ❖ 9/11/2017 (3)
- ❖ 2/6/2017 (3)

Table 4. Top 10 Days of Entrances and Page Views for WINTAC Website

Ranking	Entrances	Page Views
#1	9/15/2017	8/1/2017
#2	8/1/2017	1/31/2017
#3	1/31/2017	2/7/2017
#4	7/14/2017	9/15/2017
#5	2/7/2017	7/13/2017
#6	9/12/2017	7/14/2017
#7	7/13/2017	7/17/2017
#8	7/17/2017	2/1/2017
#9	2/21/2017	4/26/2017
#10	2/1/2017	9/12/2017

Analysis of high traffic timeframes and discussion with WINTAC TA Team members indicates that many traffic spikes coincide with upcoming trainings and similar events. From a continuous quality improvement perspective, this makes clear that relevant sections of the website should be up-to-date before important webinars and site visits. These timeframes can also be important opportunities to capitalize on a large incoming audience.

Beyond “how much,” we can also ask “what” do visitors see? And, “how do they get there?” Particularly when looking at days of high traffic, it becomes clear that one topic was driving most of the traffic thus far: Pre-Employment Transition Services (Pre-ETS). Given the significant changes and complex regulations, it is apparent that stakeholders needed guidance related to these areas and the WINTAC was a resource for them. In fact, 90% of website visitors went to the Pre-ETS landing page as their first or second page, and approximately 50% started

on the Pre-ETS page instead of the home page (having come from the learning management system for webinars).

iv. WINTAC Webpage Evaluations

As discussed in the Year 1 report, a review of best practices was conducted to inform approaches to conducting evaluations of the website and key questions to ask of evaluators. Based on the review and WINTAC Leadership preferences for maintaining an efficient experience for stakeholders, the use of pop-up surveys was eliminated as an option and instead key pages of the website have a clear (but not obtrusive) “evaluate this page” button (see green button in screenshot below). Website visitors can click this button and are directed to a short survey.



Figure 2. Screenshot of WINTAC Webpage with Evaluation Button

As the volume of responses makes clear, this strategy of requiring active selection by the respondent generates fewer survey respondents than a strategy of pop-up surveys that are administered to all or a subset of website visitors (or as with some websites, to those that aim to

register for resources or download materials); however, the data may be more meaningful as choosing to respond is entirely self-generated and not imposed upon the visitor. The WINTAC website was evaluated by 35 respondents over Years 1 and 2, with the following breakdown in Table 5 once again demonstrating the importance of the Pre-ETS topic area.

Table 5. WINTAC Webpage Evaluations by Topic Area

Area	# of Evaluations
State Liaisons	1
Announcements	1
WIPPs	3
Training	5
Distribution List/User/Login	8
Pre-ETS	17

Thirty-three out of 35 respondents (94%) indicated they found the information they obtained useful and the same number (but not same respondents) said they *planned* to use the information in the future as follows:

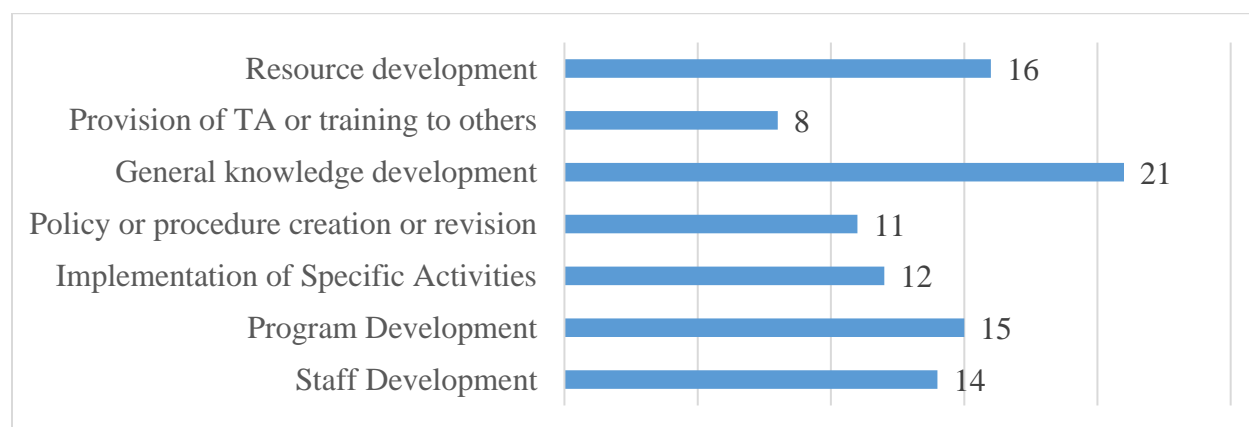


Figure 3. Planned Use of Information Obtained by WINTAC Webpage Evaluators

Respondents were asked if they would be willing to be contacted in the future and those who did were sent a follow-up survey inquiring about *actual* use of the information. Very few of those contacted have responded thus far (see Figure 4 below), but their initial responses when

asked if they used the information the way they planned (the survey reminded them of the options they had originally chosen) suggests they are following through:

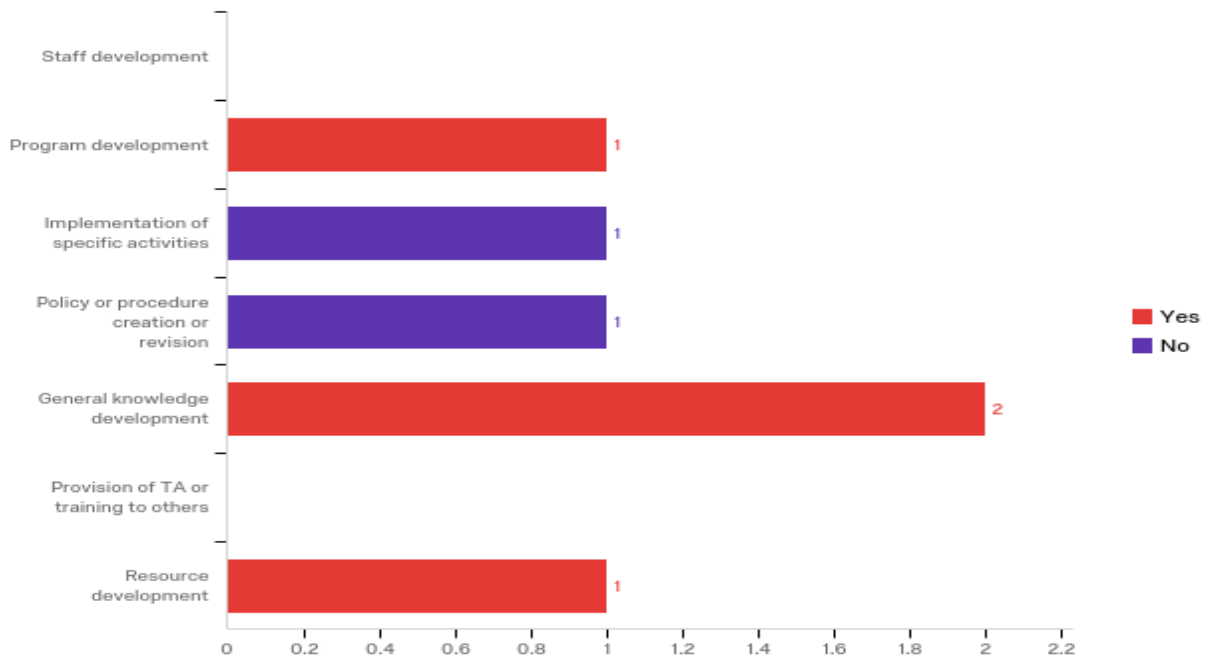


Figure 4. Actual Use of Information Obtained by WINTAC Webpage Evaluators

In addition, those surveyed by follow-up were asked if they had used the information for any of the other “planned use” categories and so far one respondent indicated they did use the information for implementation of a specific activity and others had identified new, additional planned uses:

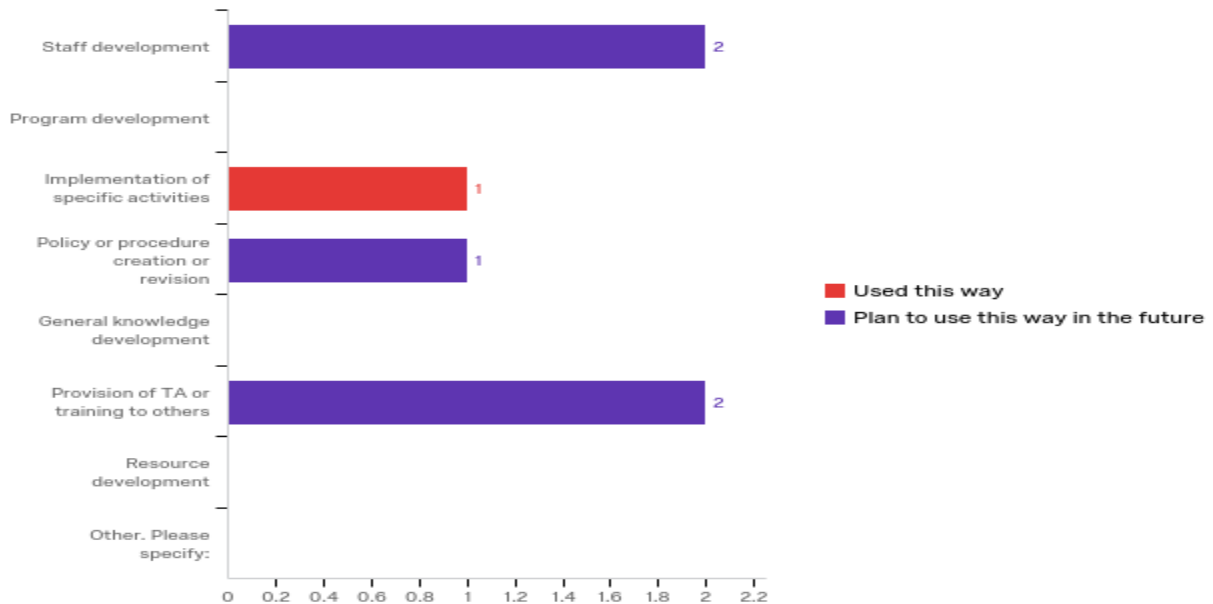


Figure 5. Unplanned and Future Possible Uses of Information Obtained by WINTAC Webpage Evaluators

When stakeholders turn to the WINTAC as a resource, such as by visiting the website for information-seeking purposes, it is important to examine the quality of that experience in several ways. The data reviewed above demonstrates that stakeholders see WINTAC as a resource and turn to it for information, spending time on the website and making plans for use of the information they obtain. A particularly positive sign is that two-thirds of survey respondents also indicated they had further contact with the WINTAC by returning to the website, applying for and engaging in Intensive Technical Assistance agreements, and joining Communities of Practice.

Knowing that the WINTAC website is an important portal to information and services provided by WINTAC, it becomes important to consider referral sources. As seen earlier, some website visitors were coming over from the webinar portal directly onto the website. In follow-up surveys, two-thirds of respondents indicated they had heard of the WINTAC website from RSA's and others' websites and RSA's newsletter. Now that SVRAs have become much more

familiar with the various Technical Assistance Centers (TACs) funded by RSA, and particularly with the WINTAC as seen from the high level of engagement with the website and in TA activities described below, there is less of a pressing need to consider how best to redirect stakeholders to the website. Nevertheless, this information on referral is instructive for those occasions in the future when WINTAC will post particularly important and time-based information to the website or needs stakeholders to register through it as a portal for some other activity. Existing RSA, CSAVR, and other guild Listservs, Newsletters, and Websites are likely to be good “connectors.”

Finally, no analysis is complete without assessing a baseline of satisfaction. Though not a sufficient condition to achieving outcomes, it is a necessary one as stakeholders will simply not avail of ongoing information, training, or technical assistance without it. In follow-up surveys to website visitors, two-thirds of respondents found information they accessed “very relevant” to their organization and rated it “high quality.” Another one-third of respondents felt the material would very useful to improving their agency’s policies, procedures, practices, capacities, or outcomes.

v. Summary

As the gateway to Universal TA, it is important to ensure the WINTAC’s website is effective in providing information that stakeholders need and which they ultimately use. Now that the WINTAC has completed two years of implementation and conducted extensive personal outreach through dedicated subject matter and regional TA representatives, it is clear fewer requests for TA are coming through the website itself, so the pace has decreased from Year 1. Enough come through (40 total came through in Year 2) that it is important to leave the mechanism available for stakeholders to request TA through the website.

Website traffic statistics showed an increase each quarter in terms of unique visitors, page views, and visits/session and a steady pace for returning visitors, new visitors, pages viewed per session and duration per session. Cumulatively, since going online in October of 2015, the WINTAC website has had 21, 795 visitors with 18, 435 returning (85%) – a strong return rate demonstrating that stakeholders indeed view WINTAC as an important and trustworthy resource for information, updates, and assistance. As in Year 1, Year 2 saw the highest demand for information related to Pre-ETS.

Stakeholder evaluations for the website are done in two ways: (1) through a button on the website that allows visitors to evaluate the specific page they are viewing and (2) through follow-up surveys we send to individuals who conducted the web-page evaluations. Both forms of evaluation demonstrated positive experiences, with the majority of individuals predicting they would use the information for “general knowledge development.” Very preliminary data from the follow-up surveys demonstrates that use across categories is occurring, including “implementation of specific activities.”

B. Targeted Technical Assistance

i. Overview

SVRAs can reach out to WINTAC for targeted technical assistance under the five topic areas. The WINTAC’s website includes a “Request TA” section that allows users to formally request targeted, specialized, or intensive TA. In addition, SVRAs shared their need for TA in the needs assessment. After an initial self-selection for targeted, specialized TA by a SVRA either through the initial assessment process, or through a request received directly from the SVRA, WINTAC followed up with the agency Point of Contact to gather more information and develop a plan to address their needs.

ii. One-on-one targeted and specialized TA

Over Year 2, WINTAC engaged in one-on-one targeted TA with 50 SVRAs (up from 30 in Year 1), and several joint TA sessions with multiple SVRAs. Several SVRAs received targeted TA multiple times, either to follow up on processes initiated through earlier TA sessions or on other topic areas. Targeted TA can occur through different means including webinars, face-to-face trainings, on-demand discussions over calls and emails, teleconferences, meetings, and presentations at conferences. Targeted TA can include consultation, policy and procedure review, development or revision of processes and documents, and sharing of best practices. WINTAC poses questions or requests for clarifications from SVRAs to RSA to provide accurate guidance. Figure 6 provides the percentage of SVRAs who received one on one targeted TA for each topic area in Year 2.

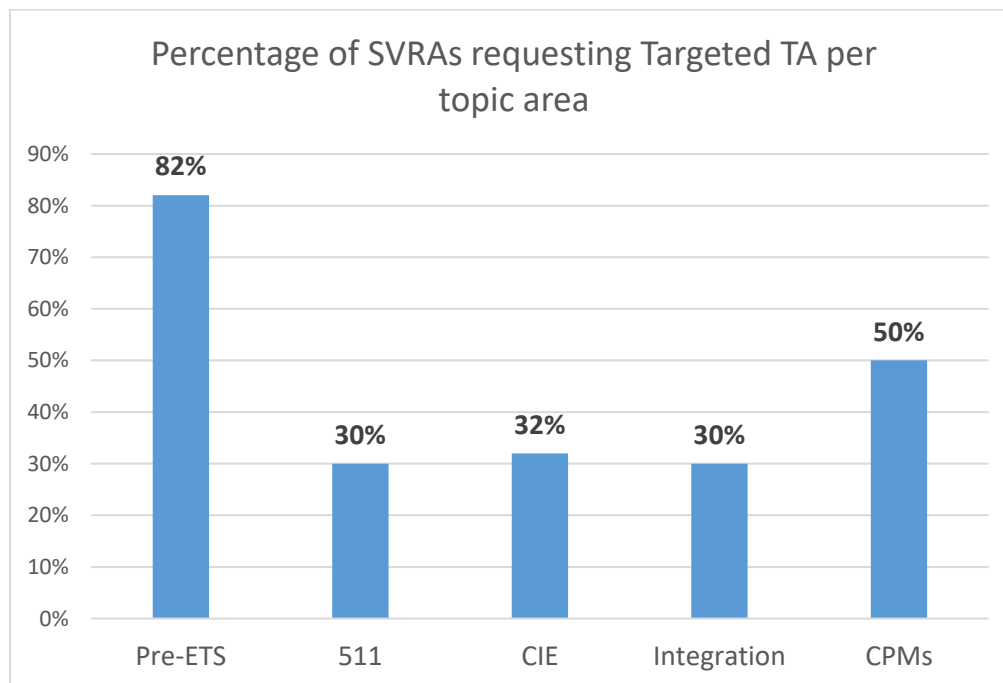


Figure 6. Topic areas requested by SVRAs in Year 2

WINTAC provided multiple joint TA sessions i.e. targeted TA for multiple SVRAs jointly. Examples include a weeklong face-to-face training on all five topic areas with the Island

VR programs including Hawaii combined, American Samoa combined, CNMI combined, Guam combined and US Virgin Islands combined. The information was tailored to address some of the implementation issues that island programs may face. Each of the islands requested an intensive TA plan as a result of the weeklong session.

In addition to SVRAs, WINTAC also received requests for targeted TA from other stakeholders such as the Arizona and Illinois Departments of Education, Michigan CIL, and the Oklahoma Rehabilitation Association. WINTAC has also taken benefit of conferences and other gatherings to reach a wide audience of SVRAs and relevant stakeholders including CSAVR conferences, NCSAB conference, and at the National Rehabilitation Leadership Institute. Table 6 provides the topic areas requested by different SVRAs.

Table 6. SVRAs receiving targeted TA by topic areas

Agency	Targeted TA Areas				
	Pre-ETS	511	CIE	Integration	CPMs
American Samoa Combined	X		X		X
Arkansas general	X		X		
California Combined	X				
Colorado Combined	X	X			
Commonwealth of the Northern Mariana Islands	X		X	X	X
Connecticut Blind	X		X	X	
Connecticut General	X			X	
DC Combined	X		X		X
Florida Blind	X	X	X	X	X
Florida General	X		X	X	
Guam Combined					X
Indiana Combined	X	X			
Iowa Blind					X
Iowa General				X	
Louisiana combined	X	X	X	X	X
Massachusetts Blind	X				X

Massachusetts General	X				
Maryland Combined					X
Michigan Blind	X			X	X
Michigan General	X	X		X	X
Minnesota General		X			
Mississippi Combined	X	X	X	X	X
Missouri Blind	X				
Missouri General	X				
Montana Combined	X			X	X
Nebraska Blind	X	X			
Nebraska General	X	X	X		
New Hampshire Combined	X		X		
New Jersey General			X		
New York Blind	X		X		
New York General	X				
North Carolina General/Blind	X	X	X	X	X
North Dakota Combined	X	X		X	X
South Dakota					X
Oklahoma Combined			X		X
Oregon General	X				
Pennsylvania Combined	X	X			
Puerto Rico combined	X	X	X	X	X
Utah	X	X		X	X
Texas Blind	X				
Texas General	X				
Tennessee Combined	X				X
Virginia DARS	X				
Vermont Blind	X				
Vermont General	X				
Washington General	X				
Wisconsin Combined	X				X
Wyoming Combined	X	X			X

The most common topic area was Pre-ETS (requested by 82% of the SVRAs receiving targeted TA), followed by common performance measures (50%), competitive integrated employment (32%), Section 511 (30%), and integration of VR into the workforce development

system (30%). Eleven of the 50 SVRAs that received targeted TA in the early quarters developed intensive TA agreements with WINTAC over the course of Year 2; two more are under development (Massachusetts General and Utah Combined).

Some SVRAs – California Combined and Maryland Combined - with intensive TA agreements also requested targeted TA for topic areas not covered by the agreement and when intensive, ongoing assistance is not needed. Thus, targeted TA can also supplement ongoing intensive TA offered by WINTAC to SVRAs.

iii. Immediate Post-Training Evaluations

WINTAC conducts brief evaluations with attendees of webinars and other trainings immediately following the trainings. Figure 7 offers a summary of planned use for the TA by attendees of onsite trainings.⁷

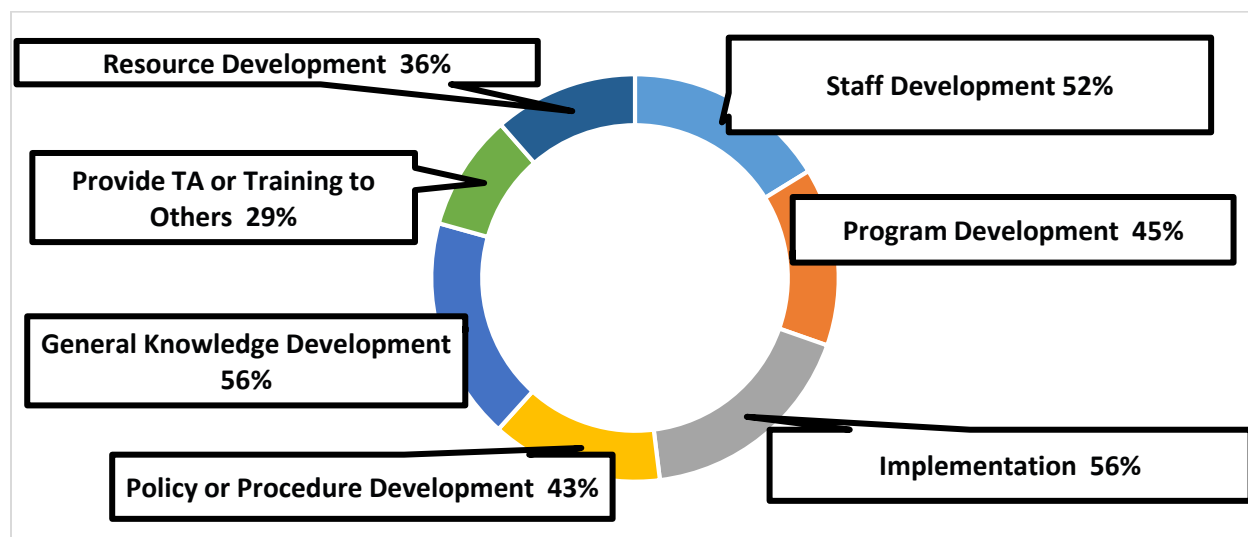


Figure 7. Onsite Training participant responses on planned use of TA

Participants at onsite trainings indicated that trainings:

⁷ Preliminary results based on fifteen returned surveys so far.

- Improved their understanding of topics and increased the clarity of regulations and requirements
- Spurred policies and practices and gave them a strategic plan
- Gave them direction on how to move forward and get to implementation
- Helped them learn how they could train staff
- Gave them useful specific examples
- Taught them how changes would impact their work and promote long-term change.

Participants at onsite trainings felt that the following would be useful changes in future trainings:

- Splitting training up over two days
- Having more time to go over all the useful information
- Getting PowerPoint materials in advance
- Having examples from other state agencies
- Having some hands-on activities.

Figure 8 offers a summary of planned use for the TA by attendees of online (live/archived) trainings.⁸

⁸ Preliminary results based on eleven returned surveys so far.

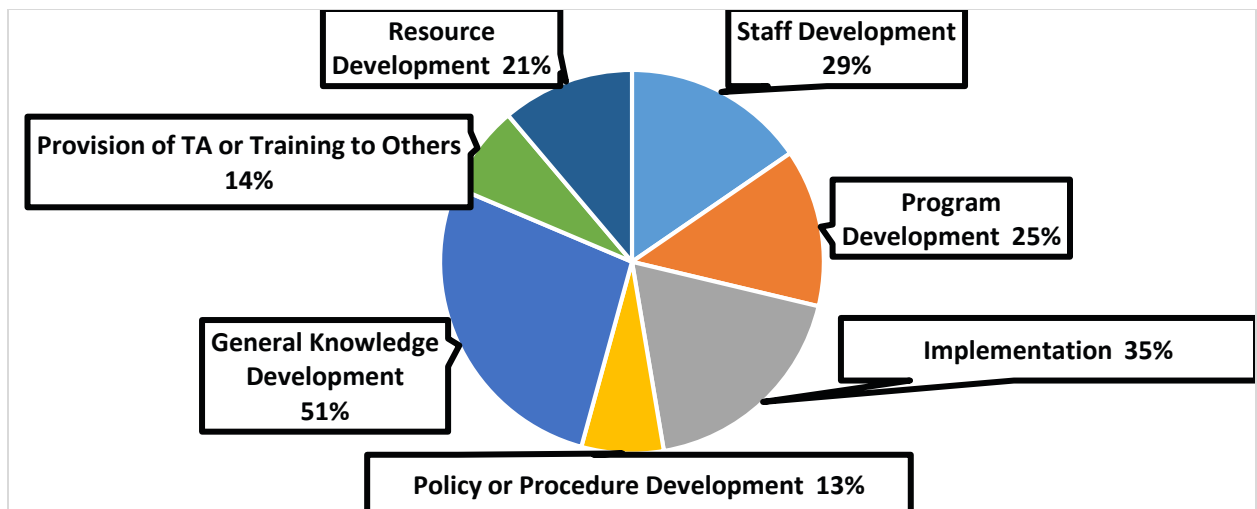


Figure 8. Online Training participant responses on planned use of TA

In general, participants of online trainings:

- Appreciated examples from other states when available
- Planned to use information as a resource to understand state reports
- Indicated that it was good to learn about new strategies (e.g., for data sharing) as that was one of the most difficult things to achieve in the past
- Found the webinars great for policy development and training tools for staff
- Appreciated the clarification on the meaning of definitions
- Felt the information would be useful in working with clients (some indicating they were already doing that).

iv. Six-Month Training Follow-up Evaluations

In addition, WINTAC's evaluation team is conducting follow-up surveys after six months post training that seek to assess the following:

- Self-perceived change in knowledge about the topic area by asking about perception of knowledge before (ideally include in baseline) and after the training;

- Confidence in being able to apply the knowledge to their work;
- Reasons for attending the training;
- How knowledge was applied, facilitators and barriers to applying knowledge;

The survey also repeats questions on satisfaction with the training (e.g. relevance, accessibility, benefits, evaluator feedback etc.). Surveys are disseminated to participants that provide contact information for follow-up evaluation. Up to the end of the fourth quarter, twenty-six participants had responded to follow-up surveys and select responses are summarized in the figures below (the full report is available in Annex 1):

Relevance of training: Respondents listed different reasons for participating in the targeted TA trainings (Figure 9): to improve skills and knowledge (32%), because it was required for their work duties or requested by their manager (27%), general knowledge (21%), due to new processes introduced at work (13%), and continuing education credits (6%).

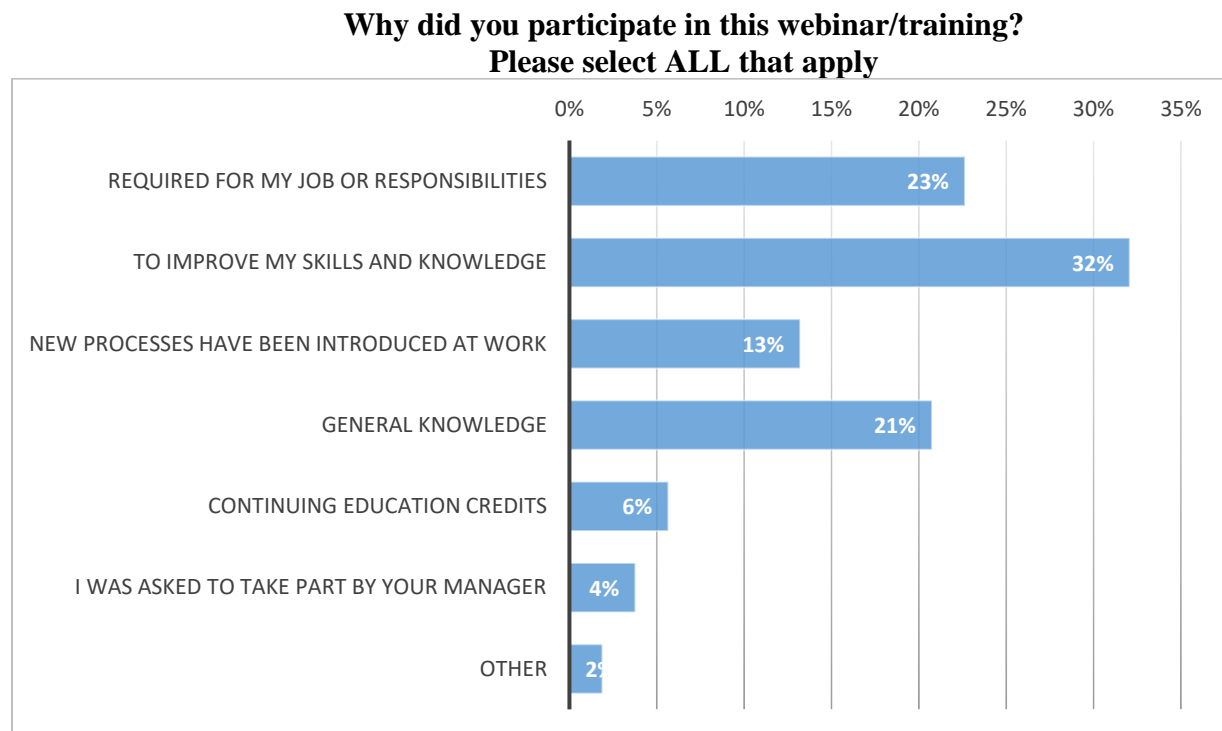


Figure 9. Reasons for participating in training

The charts below show participant reactions to the relevance of the training they received, after a 6-12 month period. 92% of the respondents agreed (42% strongly agreed) that the assistance received through targeted TA trainings was relevant to the goals of the agency (Figure 10), and 88 % agreed (46% strongly agreed) that the assistance they received will be useful in improving my agency's policies/practices/capacity and/or outcomes (Figure 11). 81% found the targeted TA received to be quality technical assistance (Figure 12).

The assistance provided was relevant to the goals of my agency

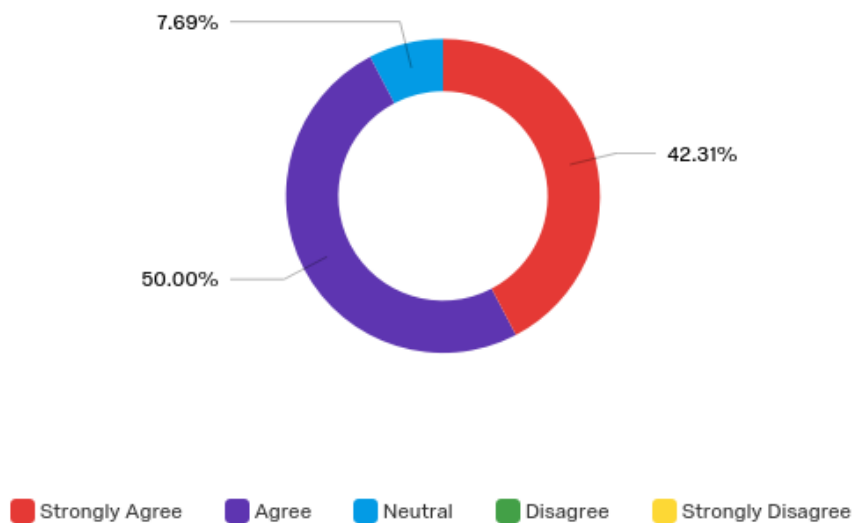


Figure 10. Relevance of training to agency goals

These technical assistance activities will be useful in improving my agency's policies/practices/capacity and/or outcomes

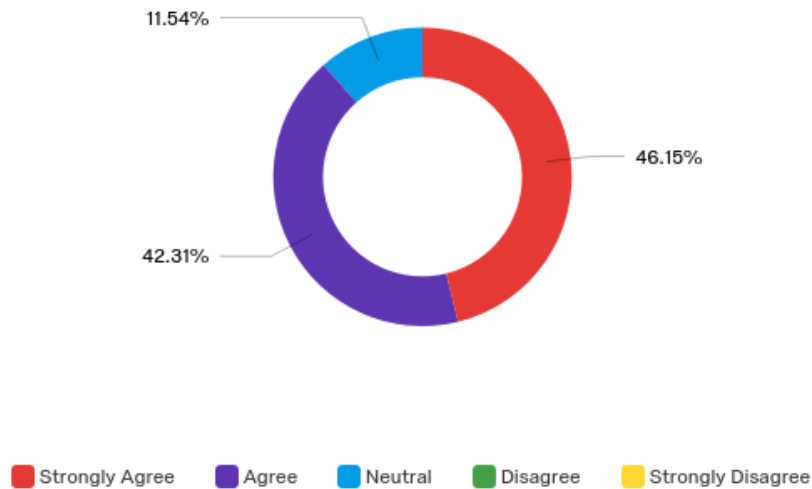


Figure 11. Usefulness of TA activities

Overall I found this was quality technical assistance

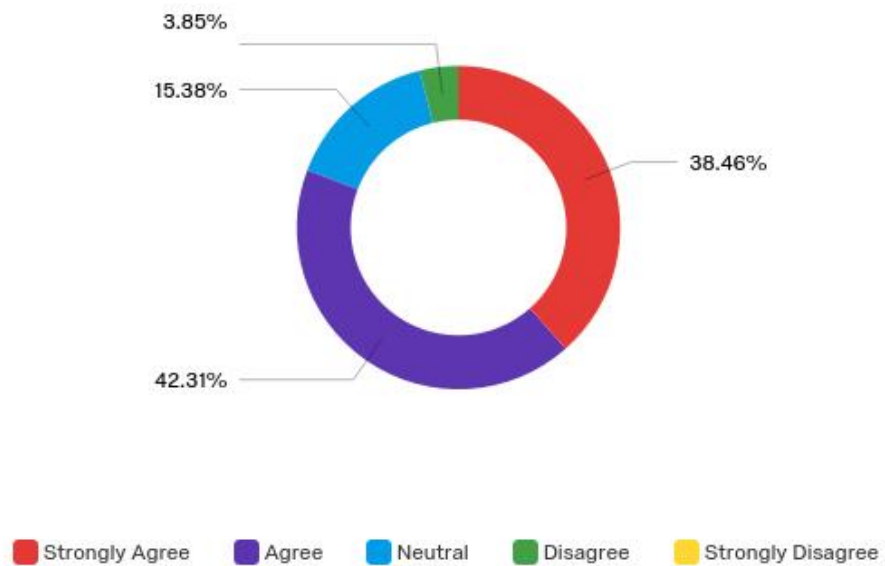


Figure 12. Quality technical assistance

Using the information provided in the training: The evaluation surveys specifically asked about how the information was being used by the respondents. 96% of the respondents said that they planned on using the information received during the training. 63% of the respondents were already using the information, while 21% plan to use the information although they have not had the opportunity yet. A majority are already putting the information into practice: 50% of the respondents stated that they have you been able to use the knowledge or skills learned in their job to a great extent and 45% to some extent.

Do you plan to use this information in the future?

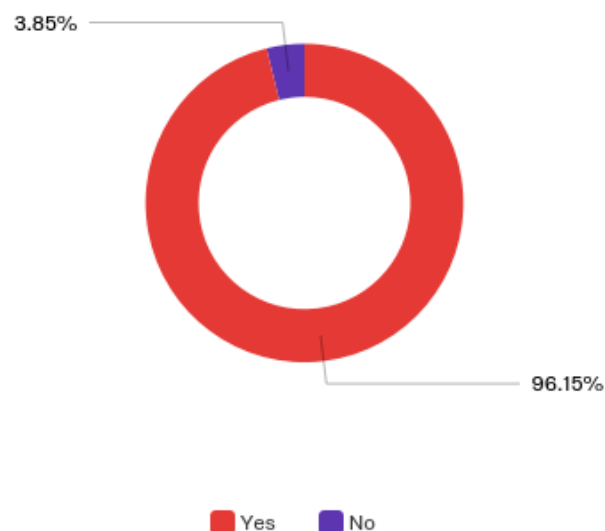


Figure 13. Plan to use information

Are you currently using the training content in your job?

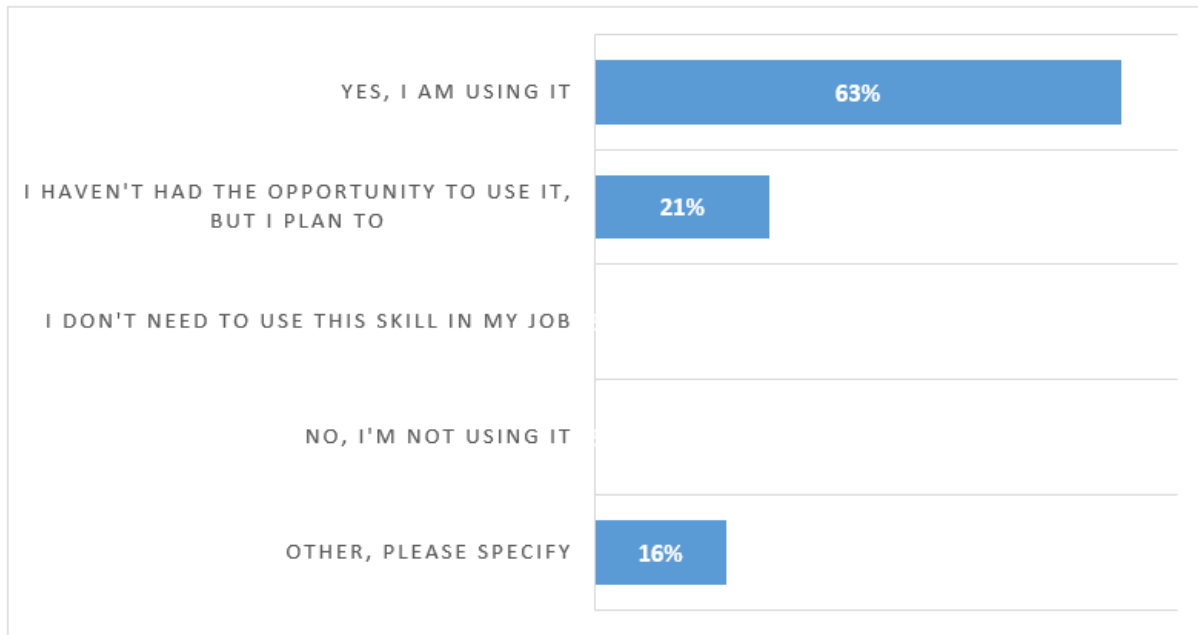


Figure 14. Current use of information

How much have you been able to use the knowledge or skills you learned in your job?

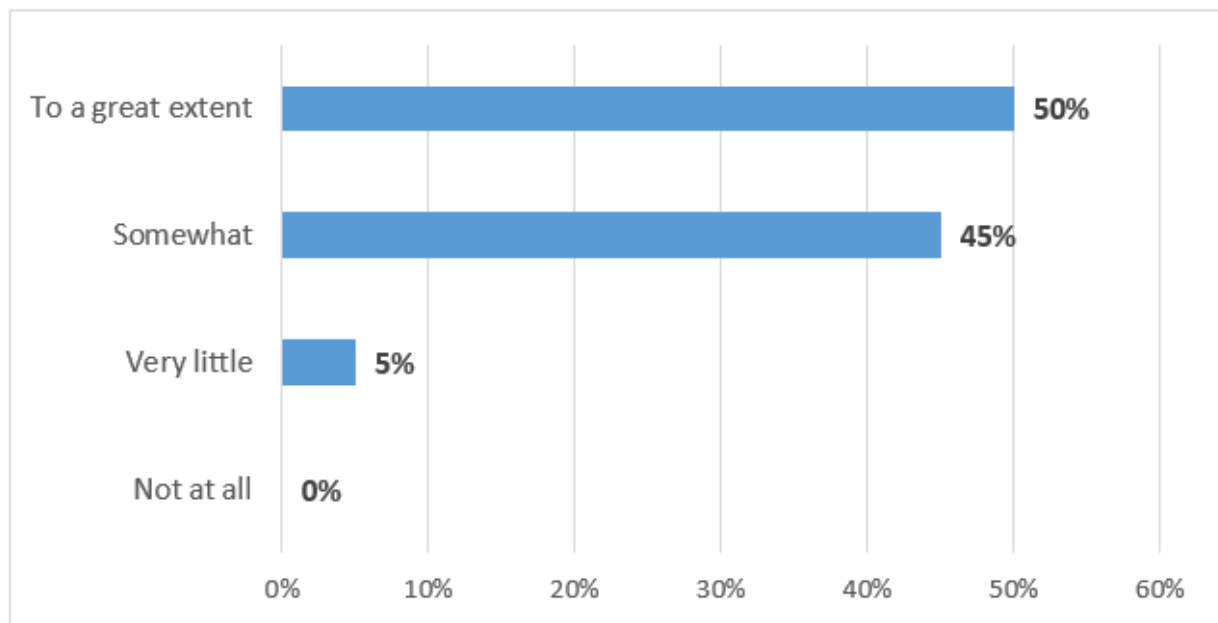


Figure 15. Extent of information use

Information provided through targeted TA (Figure 16) was mainly used for general knowledge development (29%) and staff development (15%). Other uses included implementation of specific activities (12%), policy or procedure creation or revision (12%), program development (10%), providing TA or training to others (10%), and resource development (5%).

How did you use the information in your organization?

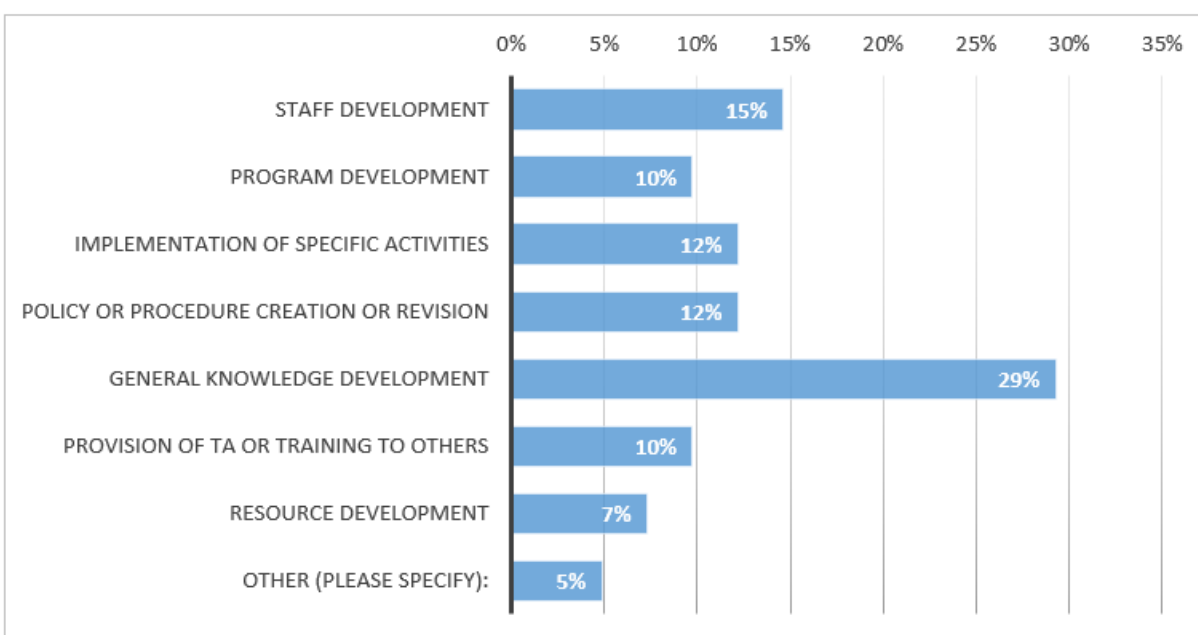


Figure 16. How was information used

The main facilitator of applying the knowledge or skills was that it was relevant to the participant's role in the agency, as mentioned by 40% of the respondents. Other facilitators include having effective tools to apply the knowledge (18%) and having opportunities to do so (10%) (See Figure 17).

What has helped you to use the knowledge or skills you learned?

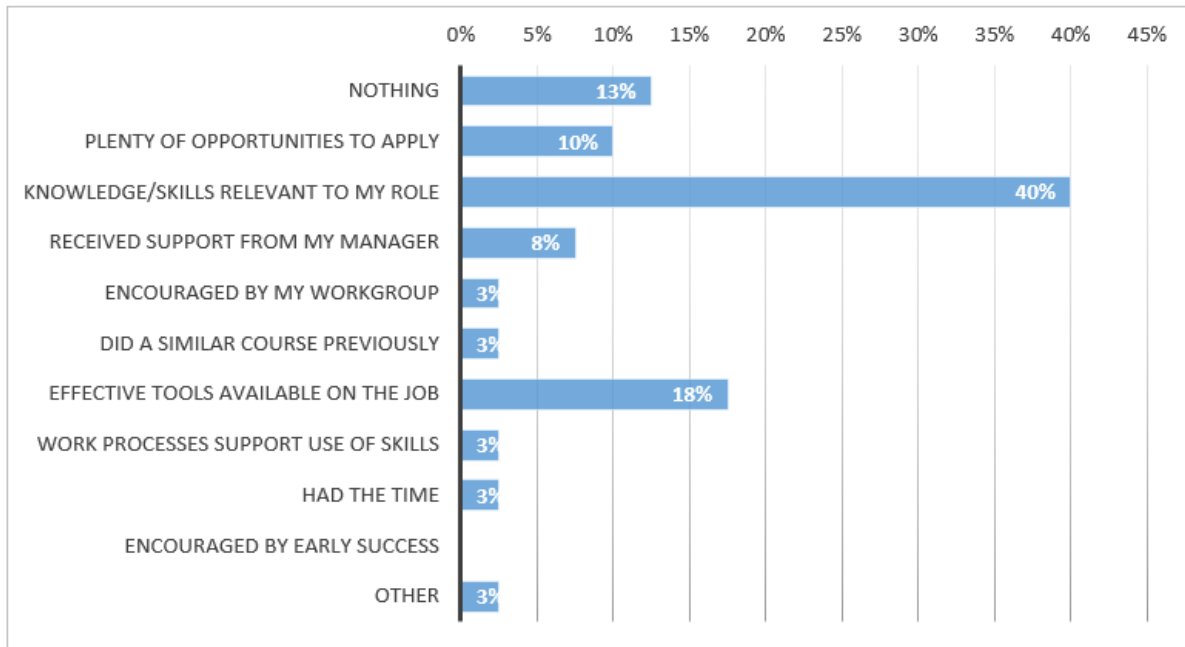


Figure 17. Facilitators to knowledge use

What has stopped you from using any of the knowledge or skills you learned?

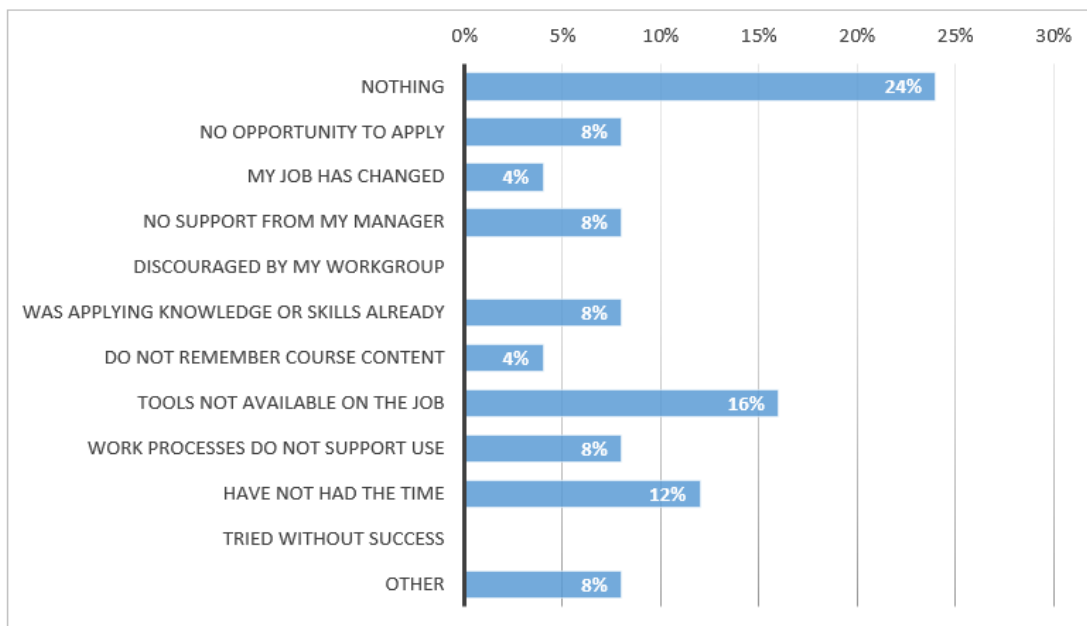


Figure 18. Barriers to knowledge use

Almost a quarter of the respondents said that they had not faced any barriers to putting the knowledge into action. A small number of participated cited barriers to use such as tools not

available on the job (16%), not had the time (12%), lack of opportunities (8%), work processes do not support use (8%), or they were working on these issues already (8%) (See Figure 18).

Change in Knowledge: The follow-up surveys on thematic areas also included questions on changes to assess self-perceived changes in knowledge and confidence in being able to apply the knowledge. Participants were asked to rate their knowledge/skills before and after training using a 5-point Likert scale as follows: 1 = None, 2 = Limited, 3 = Moderate, 4 = Good, 5 = Very good. The figures below show the differences in the mean rating on each knowledge/skill item before and after training. The number of responses for each topic area are very small to justify generalization, but offer a glimpse into the feedback offered by participants motivated to follow up.

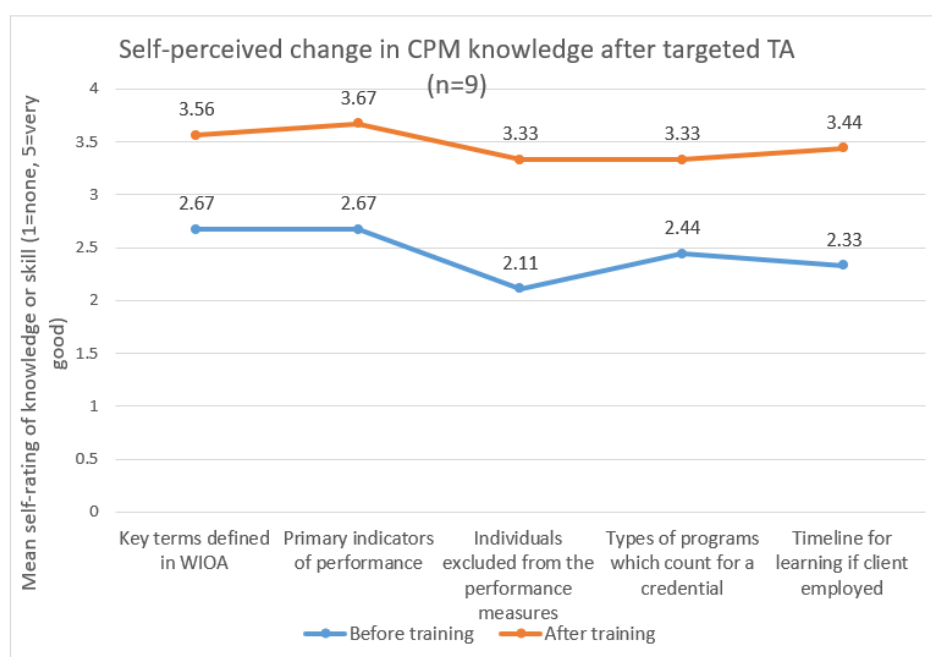


Figure19. Self-perceived change in CPM knowledge

Nine participants responded to the knowledge change assessments for the training on Common Performance Measures. The mean self-rating increased from 2.67 to 3.56 on the topic of key terms defined in WIOA (e.g. reportable individual, program participant, exit), 2.67 to 3.67 for

primary indicators of performance, 2.11 to 3.33 for individuals excluded from the performance measures, 2.44 to 3.33 for types of programs which count for a credential, and 2.33 and 3.44 for Timeline for learning if client employed 2nd and 4th quarter after exit.

The respondents also rated their overall confidence in being able to apply the knowledge as high.

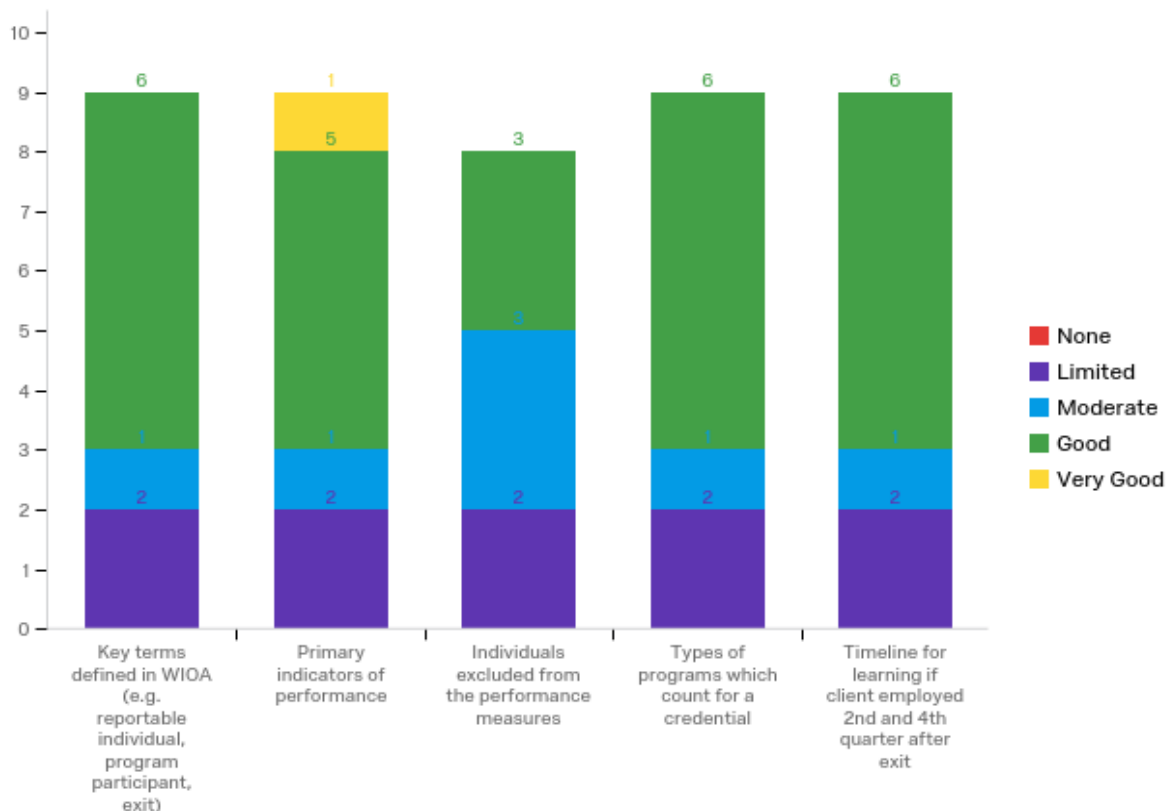


Figure 20. Confidence in applying CPM knowledge

Sixty-seven percent rated their confidence level as “good” on key terms defined in WIOA (e.g. reportable individual, program participant, exit), “good to very good” on primary indicators of performance, “good” on types of programs which count for a credential, and “good” on timeline for learning if client employed 2nd and 4th quarter after exit. Respondents displayed lower confidence on applying knowledge about “individuals excluded from the performance

measures,” with only 37.5% marking “good” while 37.5% marked it as moderate and a quarter (25%) said they had limited confidence in applying this.

Four participants responded to the knowledge change assessments for the training on Ethics and WIOA. The mean self-rating increased from 4 to 4.5 on the topic of the ethical decision-making model, 3.5 to 4.25 for potential ethical dilemmas associated with working with youth as a rehabilitation counselor in the public VR program, 3 to 4 for changes in the Rehabilitation Act found in title IV of WIOA, from 2.75 to 4 for new common performance measures and their potential effect on multiple VR systems, and 3 to 3.75 for the ethical considerations of integrating VR with the Workforce Development System.

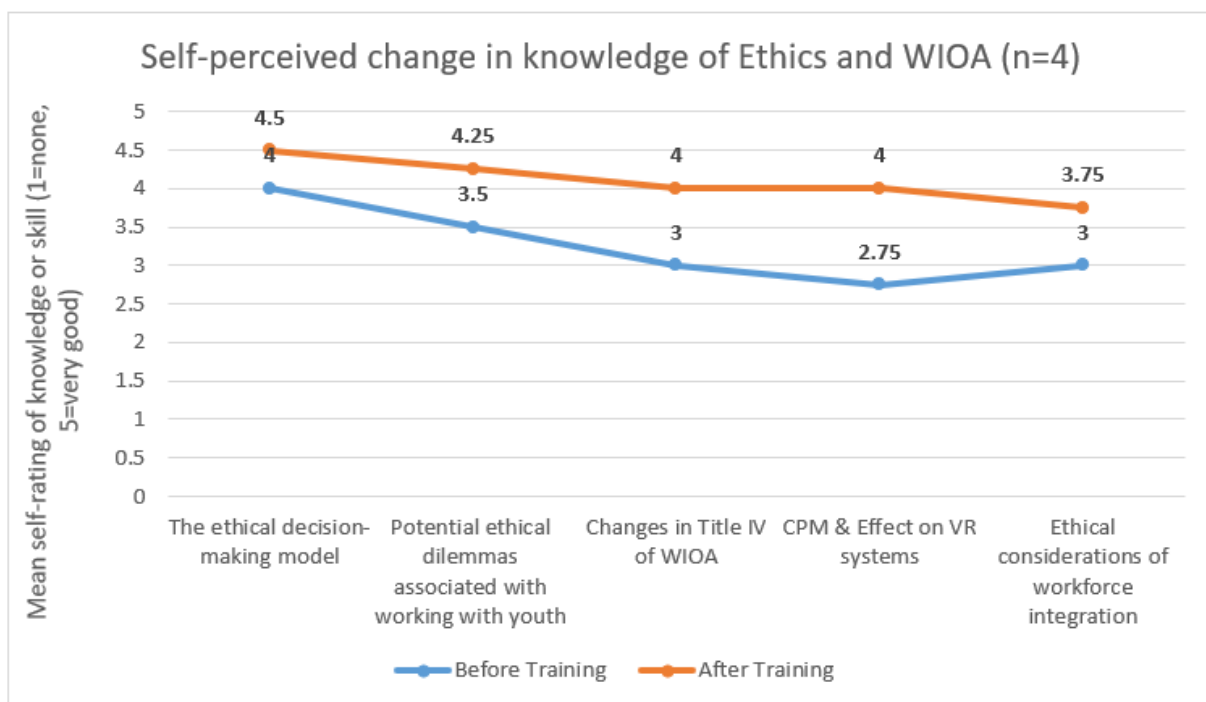


Figure 21. Ethics and WIOA Knowledge Change

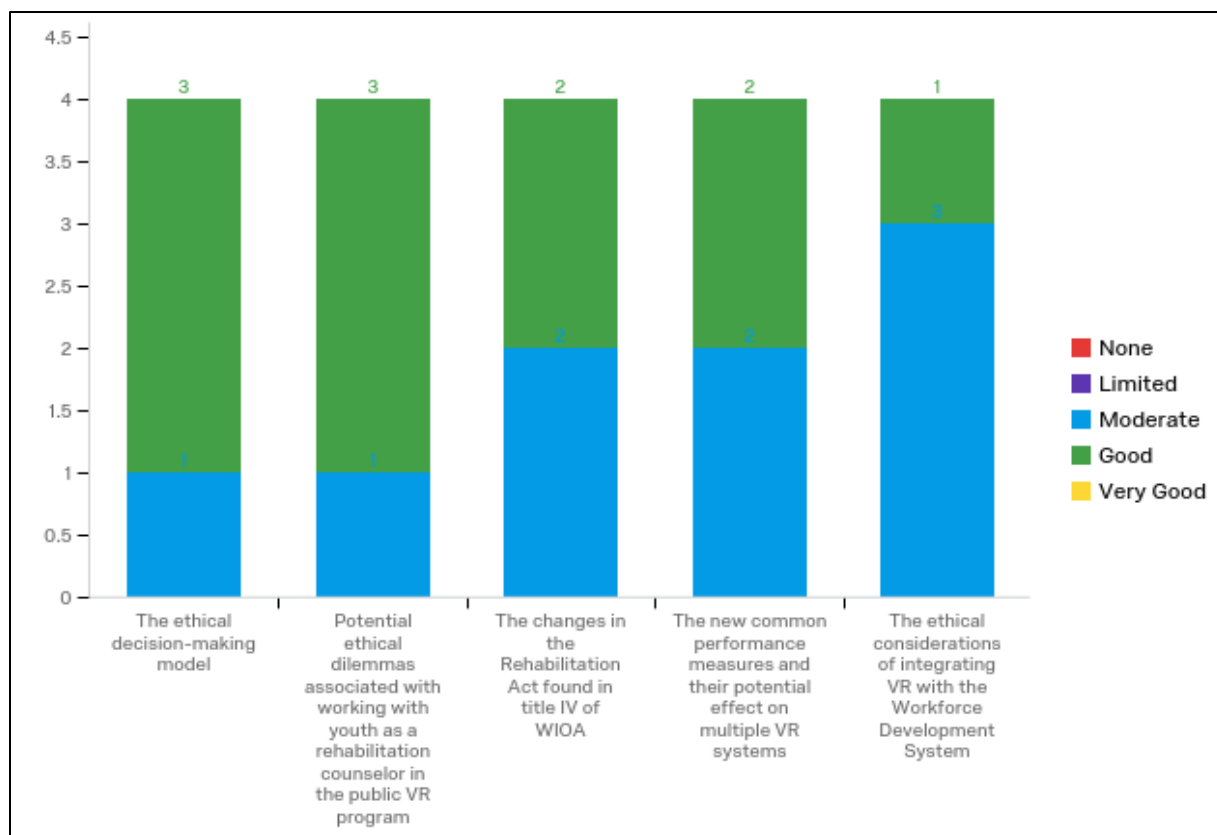


Figure 22. Confidence in applying knowledge on WIOA related ethics

For confidence levels in applying the knowledge or skills gained, 75% marked it as good for the ethical decision-making model and potential ethical dilemmas associated with working with youth as a rehabilitation counselor in the public VR program, and 50% marked it as good on changes in the Rehabilitation Act found in title IV of WIOA and the new common performance measures and their potential effect on multiple VR systems. For the ethical considerations of integrating VR with the Workforce Development System, 75% said they had moderate confidence in applying the knowledge with the remaining 25% marking it as good.

Only one participant responded to the follow-up surveys for Section 511 but demonstrated a positive change in knowledge on all topic areas. Mean score increased from 3 to 5 for the requirements for a youth 24 or younger to begin work at subminimum wage, 4 to 5 for

the requirements for a youth or adult to continue to work in subminimum wage employment, 4 to 5 for the responsibilities of VR programs, 14c employers and State or local educational agencies identified in Section 511, and 2 to 5 for the documentation requirements necessary for compliance with Section 511. The respondent also marked their confidence level as good to very good on all items.

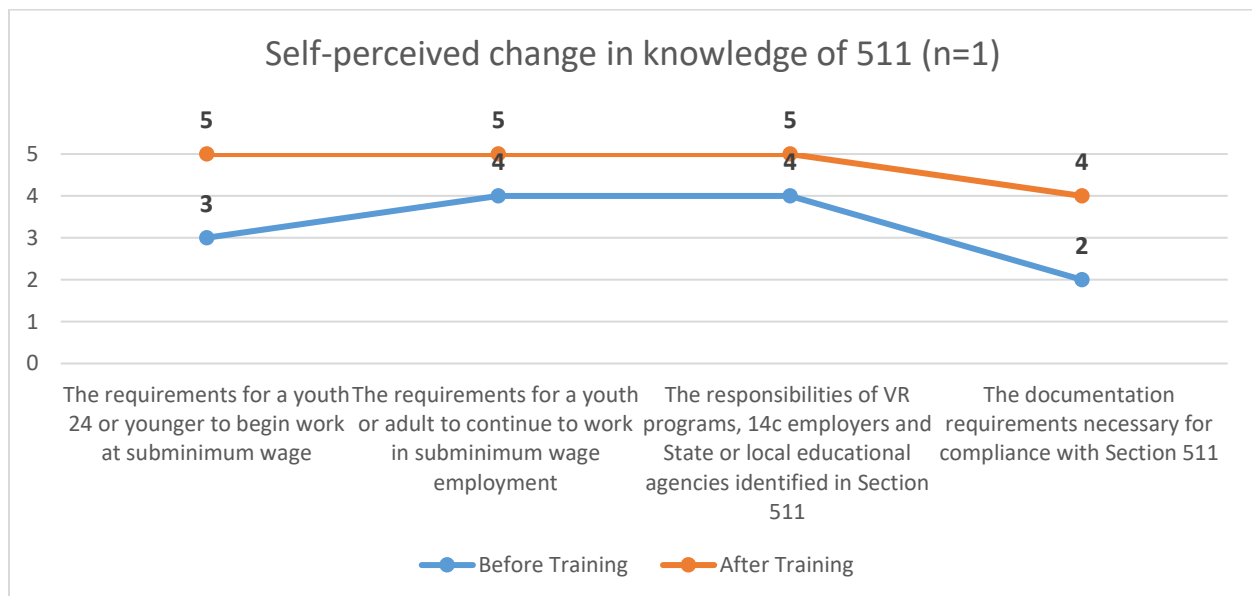


Figure 23. Change in 511 Knowledge

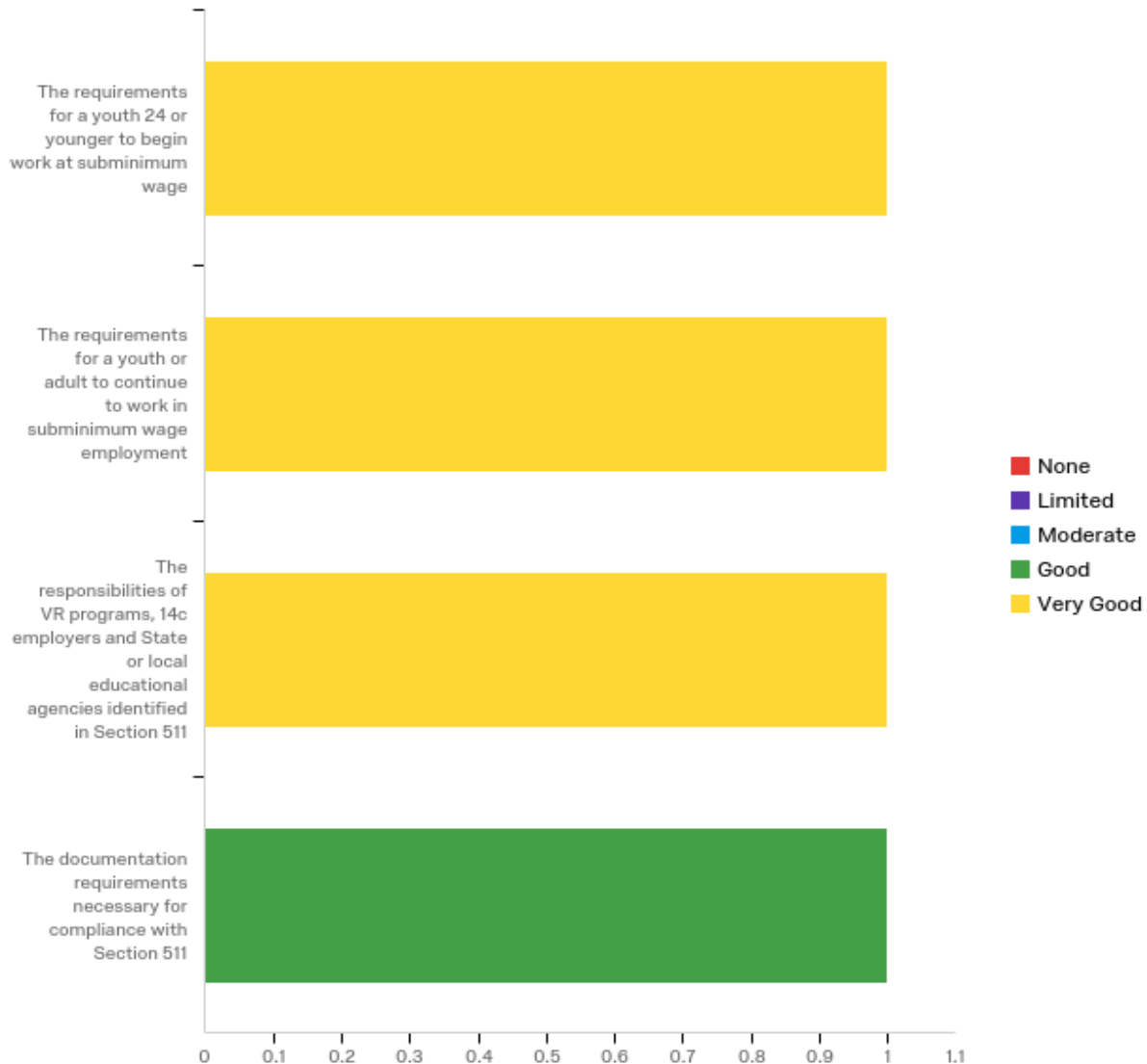


Figure 24. Confidence in applying 511 knowledge

The number of surveys completed in time for the reporting period were low due to the proximity in time to the end of the reporting period itself, as well as the typically low follow-up survey response rates to trainings. During year 3, one of the tools being provided to SVRAs as part of one of the WIPPs will be utilized by the WINTAC itself to assist with conducting these follow-up surveys: SARA. In the same way that SARA’s functionality serves to make client communication, engagement, and follow-up efficient for counselors and easy to be responsive to for clients, WINTAC will benefit from entering TA training recipients into SARA as “clients”

and communicating with them to remind them of upcoming trainings and will make conducting follow-up surveys an automated function with a built-in schedule of reminders and a simple to respond interface.⁹ In addition, the system can be used to “interview” upcoming training recipients about any needs and to conduct surveys that assess baseline levels of knowledge for a “pre-test” assessment. Current survey implementation by SARA is demonstrating response rates of over 60%.

v. Communities of Practice

Over the course of Year 2, Communities of Practice (CoPs) began implementation (distribution lists across the five CoPs for each topic area had over 500 members each, with a total distribution list of 2, 745 members) and draft evaluation plans have been developed. In Year 3 evaluation plans for each of the CoPs will be collaboratively refined with WINTAC TA Specialists (and CoP members as desired) and initiated. Substantive progress metrics for CoPs could include: identification of evidence-based practices, promising, and emerging practices; successful implementation of new practices; the capacity to expand and sustain new practices; and the capacity to replicate new practices in other locations.

Each CoP should articulate specific substantive goals and outcomes towards which progress can be evaluated. Evaluations could also examine CoP participation and engagement through attendance and discussion levels for synchronous meetings and CoP site metrics, content analysis, communication quantity, and responsiveness to posts for asynchronous activity. In addition, the evaluation can include follow-up surveys to determine satisfaction with experience, follow-up use of WINTAC and CoP websites, actual use and outcomes of information obtained,

⁹ Indeed, the WINTAC Evaluation Team suggested SARA be adapted for WINTAC to facilitate TA tracking as well, but more robust systems than the original TA Tracker were already well into development by the WINTAC Team and should address the needs of the WINTAC Leadership, TA, and Evaluation Teams.

whether participants are converted to Intensive TA recipients, and the impact of participation and learning for existing ITA recipients.

Wenger and colleagues have also provided evaluation frameworks for CoPs that outline cross-sectionally examining issues of: Domain (topics, issues), Community (relationships, roles, conflict, and structure), and Practice (learning activities and knowledge repositories developed) and longitudinally examining immediate value, potential value, applied value, realized value, reframing value (Wenger, Trayner, and de Laat, 2011).

The World Bank utilizes CoPs frequently in its work and identifies the following key evaluation questions:

1. What kinds of knowledge are the CoPs creating?
2. Is the knowledge being used?
3. What has been the impact of the CoPs on the members?
4. How will/are the CoPs sustaining themselves?

And finally, Cogburn and Levinson (2003) provide guidance on evaluating the structure and format of the CoP in a way that can support their continuous quality improvement for engagement by surveying members using the following items (The answers will be scaled on a 5-point Likert scale and the items are as follows):

1. You preferred the asynchronous technologies used over the synchronous technologies;
2. You would like all of the technologies used in the CoP to be synchronous;
3. You felt comfortable asking questions;
4. You asked questions very frequently;
5. You felt comfortable using all the software features of the platform;

6. The software used had a positive impact on your interaction with your peers and subject matter experts;
7. The activities helped translate knowledge and accelerate knowledge translation; and
8. The accessibility features and format met our needs

vi. Summary

WINTAC has provided over 1,000 instances of targeted TA with 50 SVRAs throughout Year 2 through webinars, live trainings, calls and emails. The most common topic area was Pre-ETS followed by common performance measures. Eleven of the 50 SVRAs that received targeted TA developed intensive TA agreements with WINTAC over the course of Year 2, with two more under development. Agencies and organizations other than SVRAs, such as State Departments of Education and CRPs, also made a few requests for WIOA related targeted TA. Participants expressed high levels of satisfaction with trainings provided immediately following the trainings as well as in follow-up evaluation surveys conducted over 6 to 12 months after the trainings. Participants have also started putting the knowledge gained through the targeted TA trainings into action at their agencies. Suggestions for future improvements include making the training sessions longer time to allow more time to go over the materials, opportunities for ongoing and continuous learning, and getting more practical knowledge through other agencies' practices or hands-on learning. Community of Practice distribution lists collectively number at 2, 745 and robust plans for evaluation have been outlined and will be collaboratively finalized for implementation in Year 3.

C. Intensive Technical Assistance

The WINTAC is required to provide intensive, sustained TA to a minimum of 23 State VR agencies and their associated rehabilitation professionals and service providers in the topic areas. Currently, WINTAC has signed 21 intensive TA agreements with 23 agencies.¹⁰ Table 7 provides a brief summary of intensive TA activities. See Annex 2 for progress reported by agencies for each SVRA.

Table 7. Summary of Intensive TA activities by status

Intensive TA Agreement Status	#
Number of Intensive intervention sites started	23
Number of activities started (all sites)	172
Number of activities completed (all sites)	60

Out of the total 206 intended activities for WINTAC noted in the intensive TA agreements, 83% have been initiated. Close to a third (29%) are already completed and the rest are at different stages of implementation (see Figure 25).

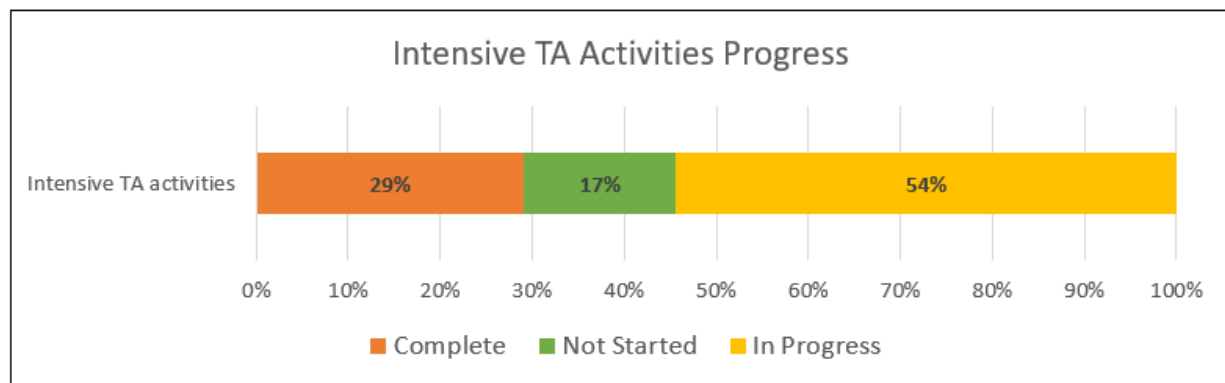


Figure 25. Implementation Progress for Intensive TA Activities

¹⁰ The General and Blind agencies in Kentucky and North Carolina have a common agreement.

i. Pre-ETS progress

18 of the 21 intensive TA agreements cover Pre-ETS – by far the largest area of intensive TA activity. The Pre-ETS team, on average, assists SVRAs through the following activities:

- Developing a plan for the provision of each of the required Pre-ETS services through community providers, education partners, contracting staff, or VR staff;
- Developing and implementing a plan to ensure that the 15% reserve of Federal funds are spent on allowable expenditures for Pre-ETS;
- Development and/or review of existing documentation policies and procedures for the provision of Pre-ETS and expenditures;
- Assisting with development of standards for provision of Pre-ETS services and establish a fee schedule for the provision of the 5 required Pre-ETS statewide; and
- Review current inter-agency agreements with SVRA and develop an updated inter-agency agreement with the State Education agency to use as a template that encompasses the required elements in WIOA to model, develop and implement local agreements for school districts/local education authorities.

Progress towards the short-term outcomes is summarized below:

Short-term outcome: All eligible and potentially eligible students with disabilities in need of Pre-ETS services will have access to the appropriate required services.

- **Expanding Pre-ETS coverage for all:** Most agencies are in process to ensure that all eligible students have access to Pre-ETS services. Four SVRAs (Alaska Combined, Iowa Blind, Maryland Combined and Nevada Combined) have already met this STO. These states have developed and put in action concrete

strategies and resources with WINTAC's assistance to ensure that Pre-ETS services are available to all eligible students with disabilities.

The strategies and resources are described and summarized through resource documents, policy notes, and fact sheets developed as outputs of WINTAC TA activities. As an example, WINTAC worked with Iowa Blind to develop and document the plan to provide and deliver Pre-ETS services to all eligible students with disabilities. A Resource Guide explains in detail about Pre-ETS services, eligibility and how students can access them. This is accompanied by fact sheets that offer examples of the types of services that students can receive (e.g. job exploration counseling, work-based learning experiences, workplace readiness training, instruction in self-advocacy) or guide school personnel on the process for referring students for Pre-ETS.

SVRAs that have met the outcome of making Pre-ETS available to all eligible students use a combination of direct services provided by a VR counselor, as well as in collaboration with local school districts and CRPs. Similarly, SVRAs that are still in the process of completely achieving this outcome, are undertaking several different actions to increase Pre-ETS coverage, such as:

- Writing Pre-ETS into agreements with education agencies;
- Establishing fee for service contracts and other contractual agreements to provide Pre-ETS services;
- Hiring more PETS Associates and training VR counselors to be able to deliver the five required services directly statewide; and
- Developing targeted Pre-ETS program options.

As an example, North Carolina Blind reports the following efforts to expand Pre-ETS services: Direct Services by DSB-VR Counselors & other field staff according to the IPE; Student Mini-Centers conducted by DSB staff and Community Partners; Direct services by DSB-VR Rehabilitation Center Programs including World of Work, Youth in Transition, College Prep.

Sponsorship of Blind/Career Specific Summer Programs; as Approved Direct Services Delivered by DSB-PETS Associates. Students that are VR clients receive these services in all of the ways listed above, while those that are not yet clients (potentially eligible) are targeted through the DSB-PETS Associates specifically.

- **Number of students who have received services over Year 2:** In addition to ensuring that Pre-ETS services are available to all eligible students statewide, WINTAC is supporting SVRAs to increase the actual number of students served. Current reported numbers by participating SVRAs range from 10% to 25%. Some of the numbers reported for FY17 are provided in Table 8. There is a wide variation in percentage of eligible students served, but it is important to note that the numbers just offer one glimpse into the Pre-ETS outcomes and we do not have the number of applications received for each state.

Table 8. Number of students who have received Pre-ETS

State	Number of Students Receiving Pre-ETS
Alaska Combined	850 served out of 3500 eligible (almost 25%); more than half (523), were students who live in rural or remote Alaska.
Arizona Combined	625 students have received services in FY17, there are 40,268 students with disabilities that have an IEP so the number is around 1.5%.
Iowa Blind	<i>Numbers provided for FY16</i> – 87 students received services out of 196 potentially eligible and eligible students (~44%).
Kentucky Gen/Blind	Services provided to 3,299 students out of 25,616 in Kentucky who have IEPs or 504 plan (14%).
Maryland Combined	Served 1,555 students with disabilities in first two quarters of FY17 out of potentially eligible students equal to 10,000 (~16%). <i>Expecting 2,440 applications in FY17.</i>
Nevada Combined	Served 1200 out of 16,888 eligible students (7%).

Another important factor is that many SVRAs have reported an increase in the number of students served in FY17 from FY16. SVRAs are also projecting substantial increases in coming years.

For example, in FY16, MA DORS served 826 students with disabilities through direct services provided by a VR counselor, as well as in collaboration with local school districts and CRPs. Comparatively, during the first two quarters of FY 2017, DORS served 1,555 students with disabilities. During federal FY 15, DORS received 1,061 applications from students in school who were less than age 22. During federal FY 16, DORS received 1,527 applications from students in school as of August 24, 2016. Given these numbers, DORS is projecting the number of applications from students with disabilities to increase by approximately 50% each year over a three-year period as follows: FY 17: 2,440 students; FY 18: 3,660 students; FY 19: 5,490 students. Nevada Combined is predicting a 10% increase in the number of students served in FY18.

Short-term outcome: 100% of the 15% Pre-ETS reserve funds will be expended on the required and/or authorized services.

Based on the figures provided during the reporting effort in September, five agencies are expected to meet or come close to expending all of the 15% reserve funds on required and/or authorized Pre-ETS services. Alaska Combined, Iowa Blind, Maryland Combined and Nevada Combined expect to meet or exceed their minimum reserve requirement and Rhode Island Combined reported expending 13% of the grant award on Pre-ETS by March 2017. Some agencies such as California Combined have received intensive TA on assessment of need and fiscal forecasting and are still in the process of developing or providing their fiscal data. All agencies that provided fiscal data and forecasting are on track to spend more on Pre-ETS in FY17 than FY16.

Some agencies had a substantial carryover from FY16 which will make it more difficult to meet the minimum requirement for FY17. Agencies are making targeted efforts to expend the reserve such as increasing the amount spent per student (North Carolina General/Combined) or planning to spend on authorized activities to build capacity in their state to provide Pre-ETS (Kentucky General/Blind).

ii. Section 511 progress

11 of the intensive TA agreements cover Section 511, of which six are at a stage to be able to report on some outcome measures. The Section 511 team, on average, assists SVRAs through the following activities:

- Providing technical assistance to agency staff to increase their knowledge of WIOA and Section 511 requirements;

- Strategic planning for implementation of Section 511 requirements. Strategic plans, developed over several interactions through email and phone calls, lay out responsibilities for different team members and timelines;
- Developing and/or reviewing CC&I&R and self-advocacy resources and materials; and
- Based on agency demands, assistance in the development of policies and procedures that will assure compliance with all of the requirements of Section 511 and evaluation of 511 compliance.

Progress towards the short-term outcomes is documented below.

Short-term outcome: 100% of the individuals in subminimum wage employment that are known to VR will receive career counseling, and information and referral (CC&I&R) services at the prescribed time intervals.

Five of the SVRAs have achieved STO of providing CC&I&R services to all of the individuals in subminimum wage employment – Alaska Combined (190), Arizona Combined (2,000), Hawaii Combined (100), Idaho General (600) and Nevada Combined (1000). The WINTAC team is currently reviewing data from the Wage and Hour Division’s 14c information for California Combined.

Short-term outcome: A decrease in the number of individuals with disabilities that choose to obtain or remain in subminimum wage employment.

The success towards meeting STO 1 in a way shows incremental progress towards meeting STO 2 on decreasing the number of individuals with disabilities that choose to obtain or remain in subminimum wage employment. The WINTAC team will have a better picture of the change in numbers as more data is gathered over time. It is still early to analyze any changes as

WINTAC is still waiting to receive data or observe case outcomes. At this point, numbers are available from three SVRAs and show minimal to no changes in the numbers for two of the agencies. In Arizona, there was a reduction of 752 individuals covered by 14 certificates from July of 2016 to July of 2017. 20 individuals applied for VR services in Arizona after receiving CC&I&R services provided by WINTAC. In Nevada, 191 youth were referred to VR services and 60 have already completed intake.

iii. Competitive Integrated Employment

14 of the intensive TA agreements cover CIE. The CIE team, on average, assists SVRAs through the following activities:

- Review and/or development of policies and procedures for CE, developing long-range plans to develop the capacity to implement CE;
- Provide training on supported employment (SE) to VR staff and CRPs to assess when SE should be provided and to develop capacity to provide SE;
- Provide information to SVRAs on customized employment models (CE) and rates as a foundation for the development of their model and rate structure for the provision of CE;
- Conduct a survey of CRP and in-house staff to determine CE experience and capacity; and
- Expansion of integrated Business Engagement to include Customized and Supported Employment (CE & SE) strategies and inclusion of LMI training for counselors. Development of plans to expand and sustain LMI capacity development and development of agency policy and procedures regarding LMI training.

The CIE team has achieved several interim outputs towards achieving the short-term outcomes. In assisting SVRAs to develop long term CIE plans, the team has provided presentations to VR and Core Partners including workforce partners and education outlining the elements of Customized Employment and strategies among core partners to develop competitive integrated employment pathways for individuals with the most significant disabilities. The team has completed or is in the process of developing models and rate structures for providing CE, based on researching what other SVRAs do.

Over the course of year 2, the WINTAC worked to establish a standardized framework for the model of customized employment services to be provided by SVRAs. As with other innovative approaches to providing services, multiple entities exist to provide training and technical assistance regarding the implementation of customized employment. WINTAC brought together the three largest training providers in the country to collaboratively develop a commonly agreed upon framework articulating the “essential elements” of customized employment. Thus, rather than tracking progress of individual ITAs, the WINTAC Evaluation Team will work with all parties to conduct a common evaluation that allows for a deeper understanding of the impact of customized employment implementation following the new “essential elements” model. Further detail is provided in the following section on WIPPs and Special Projects.

iv. Workforce Integration

Nine of the intensive TA agreements cover Workforce Integration. The Workforce Integration team, on average, assists SVRAs and other core WIOA partners to increase alignment and integration as a Workforce Development System through a range of activities:

- Assisting with the development of an annual cross-agency collaborative transition institute;
- Assisting in the development of MOUs with partner agencies that include all of the required elements;
- Establishing procedures to strengthen the role of American Job Centers in integrated resource team strategies and serving consumers with disabilities, particularly persons who are blind;
- Application of the Career Pathways model which can include establishing role of agency as full partner in common career pathway model, facilitating discussions between core partners to establish role, and assisting the SVRA and core partners in developing service delivery approaches using the model;
- Assisting SVRAs and Core Partners in the review and development of an effective Business Services strategy to coordinate with other core partner agencies.

The progress so far in meeting short-term outcomes is documented below.

Short-term outcomes: Promoting an integrated service delivery system

In each of the SVRAs, the Workforce Integration team is going through the steps of creating an improved and integrated service delivery process. One of the ways in which the team aimed to do this was organizing an annual transition institute in the state which would help in planning and knowledge transfer between the core partners to maintain alignment and would increase in participation and impact over time. Alaska Combined has decided to hold regional partner and resource institutes in lieu of one single event with narrow transition focus. In response, WINTAC is providing TA to individual regions.

One of the key measures of an integrated service delivery system will be to assess how many individuals with disabilities are being served at AJCs in partnership with SVRAs. While the WINTAC team is still awaiting relevant data from participating SVRAs to gauge quantitative progress towards meeting this outcome, interim steps have been accomplished. For example, Iowa Blind (IDB) has established a procedure that addresses how individuals with disabilities are engaged in Job Center Service Activities in all 15 Iowa local regions. IDB staff will be a part of the Disability Access Committees set up under the 15 Regional Workforce Development Boards (WDBs). The Disability Access Committees at the regional level, as well as a Disability Access Committee at the state level, have been set up to promote workforce system integration and ensure that Iowa's one-stop delivery system meets WIOA accessibility requirements.

WINTAC is also assisting SVRAs, for example Hawaii Combined and Virgin Islands Combined, to draft MOUs and establish shared service flow, cost-sharing arrangements, and common business practices with other workforce development partners. As another example, WINTAC is currently assisting Mississippi Combined in developing a written plan to identify and acquire the resources, capacities, role clarification, practices, processes and methods for provide an effective array of business services.

The Workforce Integration team is currently in the process of reviewing and redrafting the exact outcomes for this topic area. This is to clarify and sharpen the outcomes which will be used to evaluate the topic area.

Similar to Customized Employment, the topic area of Integration is another one for which WINTAC has taken on the effort of bringing together a diverse array of resources and approaches to create a common, model approach to implementation. WINTAC TA Specialists conducted a comprehensive literature and practice review and developed a measurement tool to

assess the nature (or lack) of integration across entities. The WINTAC Evaluation Team worked closely with the TA Specialists over Year 2 to conduct pilot testing of the tool to receive feedback and identify implementation challenges in preparation for its rollout in Year 3. Further details are provided in the next section on WIPPS and Special Projects.

v. Common Performance Measures

14 of the intensive TA agreements cover Section 511, of which six are at a stage to be able to report on some outcome measures. The Section 511 team, on average, assists SVRAs through the following activities:

- Increasing staff and leadership understanding of CPMs and the potential impact on policies and procedures, and specific implications for various VR positions;
- identifying processes to capture and report data necessary for the Common Performance Measures (CPMs);
- providing agency-wide training on the CPMs staff that focuses on how the CPMs affect the counseling process and client planning;
- developing policies and procedures and work performance standards for staff evaluation that reflect the new CPMs;

The progress so far in meeting short-term outcomes is documented below.

Short-term Outcome: SVRA staff are trained and have increased knowledge of CPM.

WINTAC has provided intended staff training for Hawaii Combined, Montana Combined, Mississippi Combined, and Nevada Combined and has partially completed staff training for Louisiana Combined and Rhode Island Combined. Additional training may be

provided as needed. Assessment of change in knowledge has not yet occurred. WINTAC staff offer ongoing TA via email and phone calls.

WINTAC is also assisting SVRAs in drafting performance standards for evaluating staff and developing templates for evaluating services to clients and employers. This activity is completed for Arizona combined and ongoing for other SVRAs.

Short-term Outcome: Gathering and reporting on the data elements necessary for the common performance measures; Successful achievement of all CPMs.

The SVRAs have begun collecting new data elements for CPM reporting. The first quarterly reports on number of Measurable Skills Gains and Credentials will start becoming available after 911 reporting in November 2017. Employment and earning data will be available at the earliest after summer 2018. Some of SVRAs, such as Rhode Island and North Carolina, are still in the process of negotiating targets with RSA.

WINTAC has completed (Nevada Combined) or is working on revising or creating policies, procedures, and work performance standards for the SVRAs. Part of the exercise has involved process mapping to identify processes to capture and report data necessary for the CPMs and developing a vision /plan for how the SVRAs will use CPM/911 data for future agency and resource development.

vi. Summary

WINTAC is implementing 21 intensive TA agreements signed with 23 SVRAs. Eighty-three percent of the agreed-upon activities have been initiated, and close to a third are complete. Evaluation of activities over the course of Year 2 shows steady incremental progress towards achieving the short-term outcomes for each topic area. In most cases, SVRAs and WINTAC topic area teams are still collecting data that will be used as measures to determine if intended

outcomes have been met. The preliminary data and information available shows that SVRAs are trying to take targeted steps to fills areas where they are lagging such as developing targeted spending plans and improving agency capacity and resource to achieve expected outcomes.

VII. Workforce Innovation Pilot Projects (WIPPs) and Special Projects

A. The Career Index Plus

WINTAC is offering all SVRAs and their workforce partners *The Career Index Plus* (TCI+) labor market information (LMI) system to facilitate their integration into the workforce development system. The Career Index Plus adds significant capabilities and functionality to the basic and free Career Index site which provides easy, convenient and fast access to all of the best-of-breed labor market and occupational, job openings and training provider information. TCI+ is currently an element of ITAs with five states.

Thus far, TCI+ has developed and conducted trainings with SVRAs to understand how to implement TCI+. Currently, there is a series of four webinars used as training documents and over the course of Year 3, trainees will have online, accessible, self-paced trainings available which will allow testing for CRC credits. These tests will also serve as evaluation data, to inform post-training knowledge gain and which may serve as a predictor of effective TCI+ use and consequently improved outcomes for clients. Evaluation of TCI+ use is currently in its planning and formative stages with the TCI+ TA Team, but preliminary reviews of usage by VRCs in SVRAs that have undergone training suggests that a small minority of users engage heavily with the system, many engage periodically, and many engage once. It is critical to emphasize that this pattern is an early one that may not be a reliable estimate. Rather, it is indicative of an exploratory pattern of use of an available resource.

In Year 3, SVRAs will be engaged in ITAs and pilot efforts specifically focused on SVRA adoption of TCI+. In addition, TCI+ will be more formally introduced to states engaged in ITAs in other topic areas where it can serve as an important facilitator of outcomes, such as the area of integration and common performance measures. These more systematic initiatives

will be evaluated to determine patterns and predictors of effective usage and the relation between effective engagement with TCI+ and improved client outcomes.

Year 3 will also see the development of more tailored trainings that are customized for the other topic areas across WINTAC and focus on how SVRAs need to use TCI+ to implement those other topic areas. For example, a training is in development for the topic area of Section 511 and additional ones are planned for Pre-ETS, Customized Employment, and Business Engagement. Once again, specific plans of evaluation will be developed to determine the impact of these tailored trainings to see how it improves TCI+ usage and integration into VRC counseling and guidance efforts, how it improves achievement of outcomes in ITAs related to other topic areas related to the customized training, and how client outcomes are improved.

As more SVRAs adopt TCI+, additional impact evaluation opportunities will arise, such as comparing various outcomes between “TCI+ implementing” and “non-TCI+ implementing” sites. These outcomes can be specifically related to other topic areas as noted above (e.g., level of integration). A set of common outcome measures that will always be tracked include mid- and long-term employment outcomes achieved by clients. Shorter-term outcomes will involve VR service improvements such as increased efficiency of the job development process; increased client engagement and responsiveness, satisfaction; and increased number of job matches and job placements. Even with a few, or just one, SVRA adopting TCI+ more systematically, an evaluation plan that uses a within-groups design is possible to examine impact through the use of pre-test, post-test measures. On certain client outcomes, more stable estimates of “pre-test” scores can be obtained by using a 3-5 year average prior to intervention.

B. SARA

The second WIPP is focused on facilitating SVRA transition to the common performance measures and the need to share common data elements among Workforce Development partner agencies in Section 116 of WIOA. SARA is a client engagement and communications system that automatically gathers needed information at the right time from consumers and providers without staff intervention. using artificial intelligence (AI) and natural language processing, it can engage in intelligent, two-way communications with consumers and third parties using two-way SMS (texting), email and IVR (interactive voice response). All interactions result in detailed case notes. SARA's AI engine can be easily taught to collect any kind of information a human could collect. It undertakes structured interviews with clients and providers to determine progress, barriers and milestones reached and can make basic decisions accordingly. As noted earlier, SARA is demonstrating response rates to client satisfaction surveys of over 60% and response rates that are even higher for routine engagement with clients.

In Year 1, WINTAC focused on building SVRA interest in SARA through demonstrations, holding 14 demonstrations for Nevada Combined and Workforce partners, Arkansas General, Hawaii Combined, North Carolina General, Washington General, Pennsylvania Combined, Pennsylvania Combined, Michigan General, Hawaii Combined and Adult Ed, Alaska Combined, and Washington Blind. Some agencies received multiple demonstrations. Currently, SARA is an element of ITAs with three different states: Alaska, Kentucky, and Nevada.

Over the course of Year 2, evaluation plans for SARA have been developing to systematically document its impact. Similar to the discussion above for TCI+, short-, mid-, and long-term outcomes would be documented spanning the continuum from system usage to client

outcomes: increased efficiency of job development process; increased client engagement and responsiveness, satisfaction; increased number of job matches, job placements; increased time spent on direct client interaction/follow-up and services, improved responsiveness to client; and increased continuous quality improvement as managers work with underperforming staff, cross-team strategy sharing. Some of these outcomes overlap with TCI+ and reflect what is expected when VRCs have their time freed by SARA to focus on improved client services to improve employment attainment and retention.

Also similar to the impact evaluation possibilities for TCI+, comparing various outcomes between “SARA implementing” and “non-SARA implementing” sites will be possible and valuable. In the states where ITAs are present and an explicit initiative to implement SARA exists, an evaluation plan that uses a within-groups design is being developed to utilize pre-test, post-test measures as possible. A further set of “SARA-implementing” and “non-SARA implementing” comparisons may also be possible in states with ITAs, if SARA is implemented only at certain sites. For example, in Kentucky SARA is being implemented in one of 10 workforce regions: TENCO.

Kentucky also exemplifies the type of evaluation conundrum that arises from only employing a “within-groups” or “pre-test/post-test” study design: when other changes take place during the intervention implementation phase (in our case, that is the SARA implementation phase) it is not possible to determine how outcomes are affected by these “other” changes. In Kentucky, these “other changes” reflect an over 40% reduction in the VRC workforce, and a simultaneous new mandate from the Governor to conduct outreach and follow-up to thousands of additional clients. Examining VRC client management outcomes and client employment outcomes between TENCO and Kentucky’s other nine workforce areas will allow one to

understand the impact of these “other” changes (changes that are significantly relevant to the outcomes of interest for WINTAC) and “partial” out their effects so we can look at the true impact of SARA.

A general plan of evaluation for SARA (and TCI+) can be outlined as follows in Figure 26. First, examine the effective use of SARA by VRCs; if SARA is not being utilized (or utilized sufficiently or effectively), it cannot lead to improved downstream outcomes with clients. Barriers to its usage need to be understood to facilitate continuous quality improvement in services and to effectuate the intent of SARA as an innovation. Next, understand the intermediate or “process” outcomes derived from SARA usage that should lead to the ultimate outcomes of interest: *how* is SARA changing VRC case management and client-VRC interactions. This understanding serves partly a continuous quality improvement function as well as SARA can be adapted to emphasize those functions and utilities which serve as levers to improved client outcomes and extraneous aspects of the system need not be prioritized by SVRAs for VRCs using the system. Finally of course, there is the important last step of understanding the client outcomes that derive from SARA as an intervention.

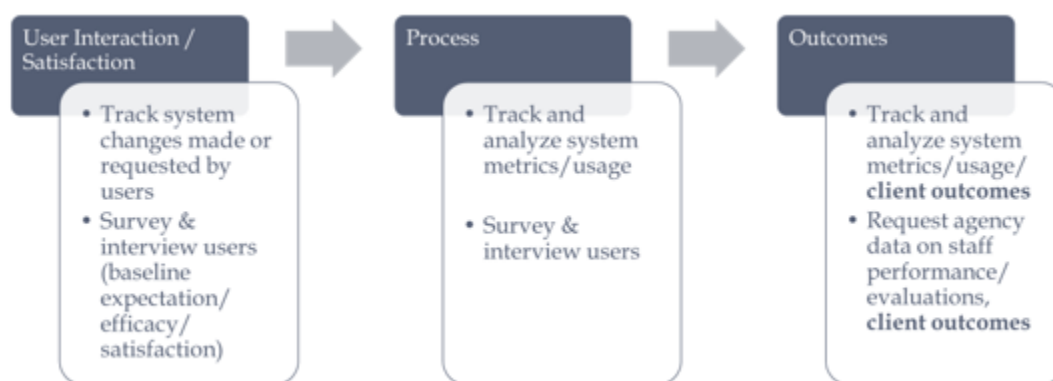


Figure 26. Conceptual Framework for SARA Impact Evaluation

The possibilities extend further; additional evaluation activities could examine SARA implementation from a cost-benefit perspective, or could examine its impact in states with order of selection where resources are constrained and an efficient client management tool could be very beneficial. As with TCI+, SARA should also improve integration outcomes by freeing up VRC time to focus on interacting with other agencies to benefit their clients.

Importantly, SARA can become an instrument of change management. SVRAs adopting SARA are doing so to facilitate improved VRC client engagement and service provision. While SARA can help manage some aspects of case management and client engagement, its value lies in its ability to allow the VRC to focus on client interaction as a part of improving counseling and guidance efforts that lead a client to employment outcomes. SVRAs adopting SARA are thus adopting a shift in service provision in many ways. As seen from extant literature (and real-world experience), change management is not always easy or effective. Even when all parties agree that a goal and shift in priorities is important, effectuating the shift can become difficult. Thus, another possible aspect of the evaluation in planning stages involves the use of an intervention strategy to improve effective SARA implementation and use. SARA use (follow-up with clients) should become a habit. Charles Duhigg wrote in “The Power of Habit” that a habit occurs when you have three key components: a cue, a response, and a reward. How do we use this to improve SARA usage and see the benefits of that we expect? We need this to happen with three sets of parties: (1) VRCs, (2) Managers, and (3) Administrators.

When SARA was rolled out to Alaska, Nevada, and Kentucky, it became apparent that not all VRCs were acting on “alerts” the system provides to let them know that it was time to re-engage with a client. It was also unclear whether managers were reading reports they receive from SARA regarding VRC system usage and alert rates. In order for SVRA administrators and

managers to effectively manage SARA implementation by VRCs, they need to review reports and check-in with VRCs when the data demonstrates a lower than desired level of usage. After WINTAC Evaluation Team and SARA Implementation Team discussions, SARA was modified to track whether managers were reading reports. This was an immediate change resulting from a continuous quality improvement process, but also facilitates additional data collection for a broader evaluation effort. Now that usage by all parties can be tracked, the next step is to conduct an intervention aimed at improving administrator, manager, and VRC use of the system.

The proposed intervention would involve each party (VRCs, Managers, Administrators) getting reports and being asked to respond to those reports. All parties could see icons indicating their report was sent and read by supervisors. In Duhigg's schema, this would represent the "cue." The system would then "ask" for a recorded response to provide to each other: Supervisors check-in with supervisees to offer strategies and support and supervisees explain performance (e.g., "I was away at conference, so alerts built up."). These documented explanations for performance status represent the "response" and serve to draw attention to the levels and types of VRC performance regularly and repeatedly. All parties will become accustomed to evaluating and planning for action. The final step is to build in a "reward" – preferably an intrinsic one rather than an extrinsic one.

Reports through SARA would be constructed to situate performance benchmarked against acceptable ranges for key measures for a given type of agency. Then, on a regular schedule (set by the agency), a report would be sent to each frontline staff member in the system. For each measure, it would graphically show them where they lie within (or outside) that range, where they lie in comparison to the rest of the staff, and ask for a comment. The comment can be dynamic (i.e., if they are outside the range of expected performance, we can ask why outside and

what they plan to do to get back inside. If performance is well inside recommended parameters, we could ask to what they attribute their success). SARA can track non-response and send reminders every two days with an alert to the manager after five consecutive non-responses. When the staff member hits "submit", the report is sent to the manager and for each comment box from staff, they will have their own comment box for a response back which SARA can also track. SARA can send reminders to managers in the same way as with frontline staff. Managers would also get a report staggered by one week. It would graphically show where their division falls in the acceptable ranges as well as compared to the rest of the agency with comment boxes for each. In addition, it would list each of their staff with a marker indicating whether a response has been received and an encouragement to respond to each as well as a link that allows them to send a message to non-responding staff. Similarly, SARA will also submit reports to administrators, staggered by one week from managers. This will be the same report as managers get, except it will show information for the entire agency with links to drill down all the way to frontline staff. The data will be saved to a reporting table for analysis. As the evaluation evolves, response options will be standardized for as many elements as possible to drop downs or radio buttons to ensure efficiency for SVRA staff.

C. Peer Mentoring

The third WIPP has been developed in response to topic areas 1-3 and includes the development and use of peer mentoring networks for young people with disabilities to help them transition from secondary education to postsecondary education and employment through the power and influence of high expectations, self-determination and the development of self-advocacy skills. Research has shown that mentors, especially peer mentors, can positively affect the movement of individuals with disabilities towards self-sufficiency through the establishment

of high expectations, support and empowerment. The WINTAC has established pilot sites/ITAs involving peer mentoring in four states currently.

The evaluation planning for peer mentoring is underway and involves both formative aspects and summative aspects. From a formative perspective, the evaluation can examine the structure of the peer networks, the number, nature, and functionality of the peer networks. In addition, it can examine which evidence-based approaches to implementation are being used, such as the utilization of mentor match (disability, work experience/interest), setting high expectations, and goal-setting strategies.

The summative aspect can of course examine changes to self-confidence and value, general and career self-efficacy, self-determination, agency, self-advocacy, self-sufficiency, an increase in persistence towards goals, academic success for youth in transition, and achievement (progress towards substantive goals set, e.g., employment).

It is possible to implement a randomized-controlled trial or experimental evaluation of peer mentoring and its impacts as well. An example would involve identifying a large group of youth in each SVRA who are interested in participating, then randomly assigning (matched pairs) some to peer mentoring groups and some to a wait-list for a period of time before they are assigned in as well. Conversely, “control” group participants could be assigned to a peer mentoring group, but given no structure or peer mentoring training. This would allow for a “business-as-usual” versus “model/intervention” comparison. Additional groups could be added if groups (networks, regions, or states) wish to implement more than one model allowing for a test of not just one but multiple models of peer mentoring. Outcomes assessed would include the summative outcomes outlined above.

D. Integration Continuum

As noted in the Intensive TA section, the topic area of integration is one in which Year 2 has seen the development of a specialized evaluation plan to facilitate the validation of a measurement tool to examine the nature and level of integration of VR into the workforce development system (WDS). The WINTAC Evaluation Team worked with WINTAC TA Specialists in this area to implement a three-phase rollout and testing of two tools: (1) a self-assessment for VR to use to determine its integration with the rest of the workforce development system and (2) an assessment for agencies across a state to use independently and as part of a facilitation to determine overall integration.

PROJECT PHASE	STARTING	ENDING	PROJECT PHASE DETAILS
PHASE 1: ALPHA TEST	Tests: 3/17/17 Revise: 5/29/17	Tests: 5/28/17 Revise: 6/11/17	REVIEW STRUCTURE, FORMAT, APPEARANCE, WORDING
PHASE 2: BETA TEST	Tests: 6/12/17 Revise: 7/10/17	Tests: 7/9/17 Revise: 7/30/17	REVIEW CONTENT, USABILITY REVIEW LEARNING IMPACT
PHASE 3: PILOT TEST	Tests: 7/31/17 Revise: 9/18/17	Tests: 9/17/17 Revise: 9/30/17	USE, PROVIDE INTENSIVE TA, RE-EVALUATE AT END-OF-YEAR
PHASE 4: YR 1 LIVE STARTS	Tests: 10/1/17 Revise: 9/1/18	Tests: 8/30/17 Revise: 9/30/17	

Figure 27. Timeline for Conducting Piloting of Integration Continuum Tool

The first phase was an “alpha” test where one small group of individuals was recruited directly by WINTAC TA Specialists to do individual reviews of the tools (structured as online surveys), followed by them coming together in a teleconference to review and share their

feedback. Based on their feedback, adjustments were made to the tools and next a “beta” test was conducted where two small groups were recruited by CSAVR to participate via webinar in a discussion of the tools after they had examined them individually to provide further feedback. At the same time, the beta test also involved two SVRAs participating in onsite facilitated trainings on the use of the tools and provide feedback to the facilitator who works with the WINTAC TA Specialist Team. Once again, based on the feedback received during this “beta” test, the tool was refined.

Next, we conducted our “pilot” testing phase which began in the summer of 2017. During this period, several (4+) SVRAs received facilitated training on the use of the tools onsite. The process of having SVRAs conduct their own independent self-assessments and then review the answers during a facilitated session, provided some of the richest feedback regarding the tools and also allowed for the WINTAC TA Specialists to gain a deeper understanding of how agency staff understand and utilize the tools. Follow-up discussions of the feedback and changes to be made will take place during the first quarter of Year 3 (this represents a slight delay in the planned timeline as represented in Figure 27 above due to scheduling the facilitated sessions with SVRAs), with the final version of integration continuum tools ready for use during the second quarter. These tools can be used during the process of WINTAC TA regarding integration at “baseline” or initiation of TA and again during regular intervals (depending on agency goals and priorities the time period can vary, but minimally it is suggested the assessment be done annually) to measure progress in integration.

“Expert” assessments of SVRA integration (by WINTAC TA Specialists engaging with the SVRA to understand changes and developments that have been scored as progress on the tool) will validate tools. Additional, external criterion that are useful for both validation

purposes and to demonstrate the connection between effective integration and client outcomes include examining the relation between levels of integration and co-enrollment statistics; co-development of a unified/combined state plan; holding an annual meeting with core partners to review/update plans; using a common case management system with core partners; conducting a process flow map/chart with core partners; effectiveness of the implementation of common performance measures reporting; employment metrics; earning metrics; credentials metrics; measurable skills gains; and levels of business engagement.

The development of tools to measure integration opens up additional possibilities to understand the integration of VR in the workforce development system and evaluate its status and ways to improve it. If all VR agencies (not just those receiving WINTAC TA) used the tools, we could ascertain a “state of the states” with respect to VR/WDS integration. National progress towards increasing integration could be ascertained with repeated measures over time. We could compare states receiving intensive TA from WINTAC to those generally making progress on their own and could examine the relationship of integration to VR’s location in their state agency structure.

Finally, as noted above, level of integration should also be impacted by, and impact, progress in other WINTAC topic areas such as TCI+, SARA, and common performance measures.

E. Customized Employment

As reviewed earlier in the Section on Intensive Technical Assistance, customized employment is one of the WINTAC topic areas in which evaluation planning discussions took place over Year 2 to go beyond tracking attainment of outcomes outlined in ITAs. While that

process will take place, a “substantive” process and impact evaluation is also possible to examine training and TA of customized employment in a deeper way.

Broadly speaking, an evaluation of customized and integrated employment (CIE) can examine an increase in implementing the essential elements of evidence-based practices/models such as customized and supported employment, determine (and create instruments as needed to measure) fidelity, and compare outcomes for clients prior to implementation of these practices and models (as with other topical area evaluations, such an approach should aim for a more stable estimate of data by examining three to five year averages).

It is also possible to conduct small or pilot RCTs or experiments to examine the efficacy of promising practices. In a review of customized employment (CE) for example, Risen, Morgan, and Griffin, 2015 noted the existence of 15 non-data studies and 10 studies with descriptive data only. This identifies a need for further evidence and opportunities for experimental, quasi-experimental, and even single-subject study designs.

Importantly, because of the WINTAC’s much needed aggregation of CE approaches by training providers, and the development of “essential elements” to implementation, a clear opportunity exists for examining fidelity as noted above. Specific outcomes of CE of course should include: increased exploration of jobs with the individual; increased work with employers to facilitate placement, including job customization; increased development of job duties, schedule, job arrangement, supervision and location; increased representation of client or professional chosen by client in working with employer; and increased provision of supports and services at job placement. Training and TA of SVRA staff and community rehabilitation professionals should lead to an increase in: trained agency and provider staff and ultimately the number of CE providers; increased involvement and resources of community, agency and

workforce partners; the number of job placements as noted above and satisfaction of individuals with the employment outcome (which should support the next outcome – retention); and job retention. Evaluations could also include examining CE’s effects on business or employer engagement, the sustainability of CE, and the utility of CE for Section 511 and youth transition.

Evaluation of other models and promising practices could examine increases in psychological, vocational counseling, and motivational interviewing as well as labor market information use and training of clients in its use. Evaluation of supported employment (SE) could include examination of an increase in the Individualized Placement Supports (IPS) and of the 29 promising best practices identified by the Evidence-Based Practice RRTC.

In Year 3, plans will be discussed to consider a focus on the CE pilots taking place and to conduct comparisons across sites of: the quality of training between the three different service providers (ostensibly using the same “essential elements” model); the quality of services and outcomes of services from Community Rehabilitation Professionals trained by the three different providers; and the outcomes of clients. There are also some states implementing CE without WINTAC involvement/TA and it would provide a further point of comparison to the essential elements model to examine the nature of CE in those states and the outcomes achieved.

A “case study” approach to documenting outcomes could also facilitate an examination of the differences, benefits, and detriments to the various models of CE implementation and the various contexts within which it is occurring. It is becoming clear that in some states, implementation is proceeding more smoothly and in other states, there may be challenges and variations (again emphasizing the utility for a fidelity measure).

F. Other Special Project Possibilities

The other topic areas covered by the WINTAC could also have evaluation activities associated with them that look beyond the outcomes specifically articulated in ITAs, to examine broader trends and SVRA status on progress nationally for comparison purposes as a part of WINTAC evaluation of TA and training, but also to determine relations between areas of TA. For example, WINTAC TA Specialists have developed a checklist for Common Performance Measures to determine SVRA activity and efforts that would align with effective implementation. Results from this tool could again be related to what should be expected progress on additional criterion such as: levels of integration and co-enrollment statistics; co-development of a unified/combined state plan; holding an annual meeting with core partners to review/update plans; using a common case management system with core partners; conducting a process flow map/chart with core partners; employment metrics; earning metrics; credentials metrics; measurable skills gains; and levels of business engagement.

In the area of Pre-ETS, a broader evaluation could determine the state of practice nationally to serve as a benchmark for WINTAC ITA states and provide examples of peer practices. The assessment could document and analyze how SVRAs are spending their 15% reserve and which strategies correlate with more effective implementation and improved client outcomes.

G. Summary

WIPPs and Special projects offer WINTAC an opportunity to engage in focused activity in innovative areas, using innovative techniques and technology, and to elevate the evaluations of impact associated with WINTAC's primary topic areas. Year 2 saw the development of robust plans of evaluation for several of these areas, notably SARA and the Integration

Continuum Tools. Efforts and discussions have already begun to reshape some activities and features of tools being provided, a reflection of WINTAC's commitment to continuous quality improvement. Year 3 will see further progress with SARA and the Integration Continuum tools, and implementation in other areas as well. As noted in the description of plans, this work provides a strong opportunity for an integrative perspective to the work of the WINTAC by drawing connections in impact across topic areas and special initiatives.

VIII. Conclusions and Recommendations

The WINTAC has completed its first two years of implementation successfully, exceeding targets in several cases. One sign of credibility and trust from the VR community, is the linkages between universal, targeted and intensive TA requests. Several universal TA requests subsequently developed into targeted or intensive TA relationships; similarly, one-on-one and joint targeted TA sessions have resulted in the developed of targeted TA agreements. The response from SVRAs to the opportunity of receiving intensive TA underlines the need for the WINTAC. While the work plan called for developing intensive TA agreements with 23 SVRAs in five years, the WINTAC has already established agreements with 21 SVRAs.

The WINTAC has also worked to build partnerships with other TACs and organizations (including Y-TAC, NTACTION, JDVRTAC, and PEQA and DEI centers), and leverage resources to deliver collaborative trainings, develop resources jointly, and partner in providing intensive TA to SVRAs.

Universal TA metrics and evaluation demonstrate consistently high usage of the website and value for the resources, as well as utilization of information obtained. Evaluation of Targeted TA metrics also demonstrates remarkably high levels of activity and service provision by WINTAC and follow-up evaluations indicate participants of trainings have begun to put the knowledge they obtained into action at their agencies. Suggestions for the future from some participants indicate a desire for more information about peer practices. Communities of practice demonstrate high levels of engagement rates with each distribution list reaching over 500 members. Intensive TA as noted above reflects WINTAC's high performance in one simple metric: in one-and-a-half years of operation, WINTAC has already implemented intensive TA agreements in 21 states thus nearly completing the minimum required 23 ITAs required of it.

This reflects WINTAC's unmitigated commitment to providing the highest level of service to any SVRA that needs it. Meeting the minimum requirements is the least of any TA Specialist's concern. WINTAC staff are driven to ensure WIOA implementation is effective, and most importantly, impactful. WINTAC's WIPPs and Special Projects also highlight this level of commitment. When the tools to implement or measure WIOA implementation are not available or are insufficient, WINTAC staff develop, validate, improve, and provide them. Resources developed will not only have value for states currently receiving intensive TA, but the field of vocational rehabilitation, workforce development, and disability employment at large.

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