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Semi-Annual Report, Year Two

SAN DIEGO STATE UNIVERSITY Research foundation

INTERWORK INSTITUTE

VRTAC-QM

Semi-Annual Performance and FIscal Report

# Executive Summary

At the end of the second quarter of Year Two, the VRTAC-QM completed eight intensive TA agreements (ITAAs). At the end of the quarter there were two ITAAs out for signature, and as of this writing, these two have been returned, so we are at ten ITAAs currently. This is our target for the entire period of Year Two, so the center is well ahead of our target. The VR agencies we have ITAAs with include:

1. Arkansas Blind
2. Delaware Blind
3. Florida General (after the quarter ended)
4. Hawaii Combined (after the quarter ended)
5. Kansas Combined
6. Maryland Combined
7. Montana Combined
8. Pennsylvania Combined
9. Washington Blind
10. Wyoming Combined

There are SWOTS scheduled for New Mexico General and Kentucky Combined that will be completed in the second half of Year Two and a SWOT for South Carolina has been completed that will likely result in intensive TA.

Targeted TA has been extremely active for the VRTAC-QM since its inception. To date we have provided at least targeted TA to 72 of the 78 VR agencies (92%) in 761 targeted TA events serving 4,262 VR staff. These totals far exceed our target rates in every area.

Universal TA is delivered primarily through our website, which has added content daily. We have completed multiple webinars, many in partnership with other TA Centers and have recorded 13 podcasts to date that are available on the site. The VRTAC-QM have made multiple conference presentations to CSAVR, NCSAB, NCRE and the Summit Group’s Program Evaluation and Quality Assurance conference.

We launched our VR Grants Management Certificate training through Management Concepts right after the end of the quarter and have developed training based on emerging topics and need in the management of the VR program including rapid engagement of VR consumers. In addition there are multiple trainings available on the VRTAC-QM website.

The special projects are moving slower than we hoped, but the CRA project made considerable progress this quarter. We are hoping to have two pilot sites identified by the end of this year and operations early in Year Three. We are refocusing the SARA pilot away from the SSA reimbursement focus to the overall quality management of the VR program and anticipate that this will increase demand significantly.

The demand for quality program and performance, and fiscal and resource management is very high and we have the capacity to continue activities and wish to continue to receive a non-competing continuation award.

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**Vocational Rehabilitation Technical Assistance Center for**

**Quality Management**

**Semi-Annual Reporting Form**

Name of individual filling out form: Chaz Compton

Organization: SDSURF – Interwork Institute

Semi-Annual report period: (Oct. 1, 2020 – Mar. 31, 2022)

Date submitted: April 29, 2022

# Section A: Progress toward completion of goals, objectives, and outputs

## Part 1: Program activities, outputs, and products

## Intensive TA agreement development and progress on activities, outputs, and outcomes:

At the end of the second quarter of Year Two, the VRTAC-QM completed eight intensive TA agreements (ITAAs) with two out for signature in addition to the eight. When we complete an ITAA, we establish monthly calls with the VR agency, at least at the beginning of the process), to monitor our progress in completing the activities and achieving the outputs and outcomes. These meetings are driven by a work plan that includes all of the elements of the ITAA and tracks the progress in each area. The overall progress for the center will be captured in the formal mid-year program evaluation report that will be provided on May 31st (as it relies on information gathered for this report). The work plans for each ITAA have been embedded in this narrative and can be fully opened by double-clicking on the icon. Each work plan is also attached to the final report if that is a preferable way of viewing the files.

This report contains a narrative of the highlights for each ITAA but does not repeat information that is readily apparent in the work plan.

**Delaware Blind**:

The team has made tremendous progress with Delaware Blind since its inception. There are nine activities and six of the nine have been completed. There are five fully completed outputs associated with the activities and one output is at 90% complete. The other three activities are at low to medium priority for the agency and have been 10% completed to date.

The short-term outcome of knowledge increase of staff is 90% complete and the other two short-term outcomes (maximizing Federal share draw-down and internal monitoring results) are at 75% completion. It seems likely that Delaware will be our first fully completed ITAA based on where they are at in so short a time.

The work with DVI was very intense at the beginning but has steadied out in the last six months. Their updated work plan is available below.



**Kansas Combined**:

The ITAA was signed by Kansas on March 26, 2021, making them our longest running agreement. The agency has been working steadily with us in a number of areas focused on quality program and performance management. We meet with the agency every other month currently and have conducted several trainings that include the WIOA performance accountability system, eligibility and plan development. This is a joint ITAA with the NTACT:C and we conducted a joint training with them on IPE development that focused on plan development for students with disabilities. This training stressed the importance of utilizing a projected post-school outcome to place a student in plan quickly and keep them engaged in the VR process.

The work plan which contains all of the progress on activities, outputs and outcomes is embedded below.



There are nine activities led by the VRTAC-QM and six by the NTACT:C. There are three of the VRTAC-QM activities that are 100% complete, one is 75% complete, three are 25% and three that are 10% complete.

One of the short-term outcomes is 25% complete and the others have established baseline data that will be measured at the end of this Program Year to determine what, if any progress has been made.

Note: We have been able to get PY 2020 baseline data from RSA on all of our intensive TA states and this will result in us having baseline data for all programs to measure at the end of each subsequent Program Year.

**Montana Combined**:

The Montana ITAA was signed on June 4, 2021. We have been working in a deliberate and successful way with the agency. They are careful to ensure they have the capacity to embark on activities and see them through to their conclusion. The VRTAC-QM is scheduled to present at their all-staff meeting in May to conduct IPE training and fiscal management training that Is relevant for all staff.

We began meeting on a monthly basis with Montana after the ITAA was signed and we have now moved to every other month. During these meetings we review our progress on all activities, outputs and outcomes in the ITAA. The work plan is current up the end of the second quarter of Year 2 and is embedded below.



There are ten activities included in Montana’s ITAA. Seven of the activities are focused on training, WIOA performance accountability reporting and data analysis for program improvement. There are three activities focused on fiscal management. Montana is also on of our Employment First Systems Change pilot programs, but this work has just begun as the State has been slow to move to an Employment First initiative.

There are two activities that are 50% complete, two that are 25% complete, one that is 15% complete, one that is 10% complete and five that are not started. One of the short-term outcomes has been 25% achieved and the others have recently established baseline data that will be used to measure progress at the end of PY 2021.

**Pennsylvania Combined:**

The ITAA for Pennsylvania Combined was signed on June 28, 2021 and includes a wide array of activities focused on training, program and performance, VR regulations, pre-employment transition services and fiscal management of the program. Work has been very intense with Pennsylvania since it was signed, though there was an interruption when the leadership of the agency turned over. The new leadership determined that they wanted to continue with TA, so we have begun working with them intensely since then.

We have been meeting with Pennsylvania on at least a monthly basis, including an in-person training and TA visit. The ITAA for Pennsylvania is a joint endeavor with the NTACT:C and the plan include activities that are led by the NTACT:C. The work plan for Pennsylvania is embedded below.



There are 20 activities in the Pennsylvania ITAA, making it the longest of any of the agreements we have in place to date. There are three activities that are 100% complete, one is 75% complete, one is 50% complete, six are 25% complete and eight have not been started.

There has been baseline data established for all of the short and long-term outcomes, and one of the short-term outcomes has been 25% achieved to date. We will have more complete data on outcomes once PY 2021 has been completed and we have that data to compare to PY 2020.

**Maryland Combined:**

The ITAA for Maryland Combined was signed on 10-15-21. This agreement is solely focused on data gathering and analysis related to determining the effectiveness of purchased services. There are four activities that are specific to data gathering and analysis and one focused on tracking, validating and reporting data necessary for the RSA 911 case service report. We knew going into this agreement that getting the data from the agency in a useable form for analysis was going to be a big effort. The agency ahs been working steadily with Chris Smith, who developed a data analysis tool that can be used for this project once the data is ready. The work plan for Maryland is embedded below.



The VRTAC-QM team conducted a national and state level analysis of data related to Maryland, including their service regions that includes data on population, disability levels and types, educational attainment, poverty levels and income levels. This data will be used to identify where the greatest need is in Maryland by service region and contributes to the agency’s decisions on where they may want to focus their resources. This activity is 100% complete. The data gathering process is 60% complete as of this writing, and the other three activities are not started yet as they rely on the data analysis.

**Arkansas Blind:**

The ITAA for Arkansas Blind was signed on 1-6-22 and is completely focused on fiscal management of the VR program. This agreement stemmed from the RSA monitoring process and the subsequent corrective actions. The fiscal team has had two in-person trainings and TA meetings with the agency which helped us to fully understand the depth of the fiscal issues they are dealing with. The fiscal team broke up the activities in the ITAA into smaller parts in order to track the progress of their work. We include this information so that the depth of the work can be identified.



There are nine activities associated with the work in Arkansas Blind that are 100% complete, while nine are identified as in progress. One of the activities is listed as 75% complete and two are noted at 50% complete. In the ITAA activities, the training activity is 50% complete, the leadership development activity is 25% complete and three of the fiscal activities are 25% overall. The short-term outcome of knowledge increase is 25% achieved.

**Washington Blind:**

The ITAA for Washington Blind was signed on 1-12-22. The agreement focuses on leadership development, training and tracking and reporting data for the RSA 911 case service report. Shortly after signing the agreement, the agency was monitored and asked to put all work on hold until after the monitoring process was complete. As of this writing, they have completed monitoring and we sat in on all of the sessions with RSA. The agency has requested to begin the activities, so as of the end of this quarter, we sent them a draft of the staff training needs assessment and are scheduled to meet with them in May to kick-off the leadership development training. Consequently, there is not a work plan developed for this agency as of this writing, but there will be one developed in the third quarter.

**Wyoming Combined:**

The Wyoming Combined ITAA was signed on 2-15-22 and is another agreement focused primarily on fiscal quality management. There are 11 activities in the ITAA, all with a fiscal focus. The team has made two in-person trips to Wyoming and did a considerable amount of targeted TA with them before moving into an intensive agreement. One of the major issues in Wyoming revolved around the DSA exerting too much authority around the expenditure of funds for the VR program. The TA in Wyoming has involved several of the DSA staff, and they are working much more effectively with each other since our intervention. The work plan for Wyoming is embedded below.



As was the case with Arkansas Blind, the fiscal team broke up the smaller activities within each ITAA activity to track progress. In the ITAA, the training activity is 50% complete, the leadership activity is 25% complete, and one of the fiscal activities is 100% complete. There are three fiscal activities that are 75% complete, four that are 50% complete and one that is 25% complete. One of the short-term outcomes is 50% complete.

***New requests for intensive TA in the second quarter:***

The following agencies have reached out to us for possible intensive TA:

* + - 1. **Florida General**
			2. **Hawaii Combined**
			3. **New Mexico General**
			4. **South Carolina General**

## SWOT assessment tools development and assessments conducted

There have been ten SWOT analyses conducted since the project began. The SWOT questions were reviewed and approved by RSA. All of the agencies listed as having intensive TA agreements had a SWOT completed. In addition, South Carolina General, Florida General and Hawaii Combined had a SWOT completed this quarter. As of this writing, Hawaii and Florida have signed ITAAs in place, thought his happened in the first month of the third quarter.

## Program Evaluation:

The mid-year program evaluation report will be submitted 30 days after this report is completed as the data in this report is necessary to complete the report.

# Targeted TA

The requests for targeted TA in the second quarter were significant and increased from the irst quarter of Year Two.

## Number of events by type, topic, agency and number served:

Table 1: *Targeted TA and Training during the 2nd Quarter of Year Two*

| **Targeted TA in Year 2 Quarter 2** |
| --- |
| **Agency** | **Request** | **Number Receiving TA** |
| Alaska Combined | CAP response and work plan | 25 |
| American Samoa | 911 reporting and submission | 1 |
| Arizona Combined  | CMS data collection and reporting; Policy review | 2 |
| Arkansas Blind | Fiscal reporting prior to ITAA; PARS contract development | 10 |
| California Combined | TPCAs; data analytics and reporting and performance levels; internal controls | 13 |
| CNMI Combined | Policy review and Q&A on multiple topics; Leadership development | 5 |
| Colorado Combined | Unused funds TA | 6 |
| Connecticut General | Program and performance QM; staff recruitment and retention; CMS data collection and reporting | 3 |
| Delaware Blind | Program and performance QM not related to their ITAA; CMS data collection and reporting; rapid engagement | 4 |
| Florida General | Tracking and reporting; fiscal resources and training | 2 |
| Guam Combined  | pre-ETS | 1 |
| Hawaii Combined  | Staff training on eligibility; completed SWOT; pre-ETS fiscal; match; P&P review; internal controls | 55 |
| Idaho Blind | Internal controls and monitoring prep; reporting and pre-ETS fiscal and reporting | 5 |
| Idaho General | Contract monitoring; staff retention best practices; internal controls | 5 |
| Indiana Combined  | Rapid engagement | 1 |
| Iowa Blind | CE and SE Community partnerships | 1 |
| Iowa General | Grant management training | 1 |
| Kansas | Policy and procedure development - unrelated to ITAA | 2 |
| Kentucky Combined | Fiscal and Resource QM; residency requirement; RSA 17; CAP response related to fiscal issues; Capital projects; field training on cost-principles and internal controls; prior approval | 330 |
| Louisiana Combined  | Match | 1 |
| Michigan Blind | Program and performance and fiscal and resource QM on pre-ETS; expected levels of performance | 9 |
| Michigan General | staff performance evaluations; expected levels of performance | 1 |
| Minnesota General | Pre-ETS fiscal | 1 |
| Mississippi Combined | Establishment projects; eligibility training; pre-ETS fiscal | 9 |
| Missouri Blind | P&P Internal controls  | 1 |
| Missouri General | Rapid engagement | 1 |
| Montana Combined  | Community partnerships and MOUs | 1 |
| Multiple States | Monitoring CoP; financial management of the VR program presented to NRLI (ELSS); grant management and period of performance | 92 |
| Nebraska Blind | Policies and procedure examples; contract review; period of performance | 3 |
| Nevada Combined | Assisted in amending staff performance standards to include MSG and CA rates; CMS tracking and reporting of MSGs; fiscal reporting; CMS data collection; pre-ETS fiscal | 26 |
| New Jersey Blind | Data analytics | 1 |
| New Jersey General | Data analytics, internal controls and reporting; program improvement; staff performance standards; contracts review; CAP review; SE grant funding; CMS data collection and reporting; post-exit reporting | 52 |
| New Mexico General | CAP review and response; CMS data collection;  | 7 |
| New York General | Unused funds; | 4 |
| North Carolina Blind | Internal controls and WIOA performance | 1 |
| North Carolina General | Unused funds TA | 5 |
| Oregon General | Contract review; RSA monitoring; pre-ETS fiscal and reporting; indirect and cost allocation; sources of match; fiscal strategy | 44 |
| Oregon Blind | Fiscal internal controls; fiscal reporting; assignment of obligations; training on period of performance; policy and procedure review; Use of CMS for fiscal management; SE policy and procedure | 76 |
| Pennsylvania Combined  | Recruitment and retention unrelated to their ITAA; CMS data collection; internal controls | 12 |
| Puerto Rico Combined | Reporting for the 911 | 1 |
| South Carolina General | P&P review; community partnerships; internal controls; State plan; expedited eligibility rate setting; policy and procedure review | 47 |
| Tennessee Combined | Program and performance; OOS planning; fiscal QM; | 20 |
| Texas Combined  | Internal controls for the VR program; informed choice | 2 |
| Utah Combined | Pre-ETS and reporting | 2 |
| Virginia Blind | SARA | 2 |
| Virginia General | CMS data collection and pre-ETS reporting; internal controls | 7 |
| Washington Blind | Internal controls related to program and performance; reporting | 2 |
| Washington General | Community partnerships | 1 |
| West Virginia Comb. | NRLI | 2 |
| Wisconsin Combined | Internal controls and tracking and reporting | 1 |
| Wyoming Combined | Fiscal reporting; DSA and DSU fiscal prior to ITAA; assignment of obligations; RSA 17 | 23 |
| **Totals = 51 agencies (including multiple listings of multiple agencies); 122 targeted TA events (separated by semi-colon in list above including ten events in multiple listings)** | **929** |

A total of more than 51 SVRAs requested some form of targeted TA during the second quarter. There were 929 VR staff that received the TA directly, though this is not an unduplicated count. Since the inception of the VRTAC-QM, we have provided at least targeted TA to 72 of the 78 VR agencies (92%). There have been a total of 761 targeted TA events since the QM began and 4,262 SVRA staff that have participated in these events (not an unduplicated count).

## Targeted TA of Note:

In partnership with CIT-VR, we launched the recruitment and retention pilot that includes four agencies: Oklahoma Combined, Arkansas Blind, Connecticut Blind and Iowa General. A description of the pilot is included below:

**Summary of Recruitment and Retention Pilot Project**

In response to the current crisis in staff attrition and recruitment of new staff in many State VR agencies, the VR Technical Assistance Center for Quality Management (VRTAC-QM) launched a pilot project to assist up to 4 agencies in developing customized strategies to address these issues in their organizations. The four agencies that requested to be part of this pilot project are AR-B, CT-G, IA-G, and OK-C.

The VRTAC-QM team for this project will provide technical assistance that will include:

* Facilitation of an assessment process with the agency’s leadership team to identify specific factors within their organization and externally that are contributing to the attrition of staff and the related difficulties of recruiting new staff to fill vacancies
* Based on the data obtained from this assessment, assist the leadership team in developing a multi-year work plan to address identified factors that contribute to this problem.
* Provide ongoing guidance and coaching to the work team in the agencies charged with implementing the work plan.
* Development of evaluation protocols to measure progress of implementation of the work plan, and assist in modifying the plan based on additional data and feedback.
* Evaluating outcomes and assisting in developing strategies to sustain the change effort.

Guided Assessment

Guided assessment forms the basis of a process of discovery for organization leadership to identify factors that contribute to the problem of attrition and will assist agency leadership in developing solutions.  The review will encompass factors both internal and external to the VR agency.   The online sessions will be scheduled for a 2 hour period.  The team has developed an assessment tool to guide the process.

Agencies were advised to assemble a group of core staff that will be part of each phase of the project from assessment to implementation. That group of staff should be present at the 2-hour facilitated assessment session. Staff recommended to be part of the core team should include:

* Members of the Executive Leadership Team
* Human Resources Director
* Staff Development/Training Coordinator
* Field Services Administrators
* Other staff that you determine could assist in this process, e.g., if there is a unit/office in your organization where attrition is high and systemic and/or very low, you may want to consider including a member of the staff from that unit/office.

Documents for Assessment:

Agencies participating in the pilot project were also asked to send key documents prior to their assessment session so that team members have a greater understanding of each agency in the pilot.

* Comprehensive System of Personnel Development (CSPD) section of the VR portion of the current State Plan.
* If not included in the CSPD section, requested details about the following:
	+ Current and historic (3-5 years) attrition rate
	+ The number of pending retirements and their positions
	+ Average time to fill staff vacancies
	+ Details on any current hiring freezes
	+ Details on fiscal or administrative issues that impact hiring
* Any trends identified from the following:
	+ Stay (Retention) Interviews, (if performed)
	+ Exit Interviews, (if performed)
* Current Recruitment Plan
* Details about your current onboarding process
* Other documents that you believe would be helpful to learn more about the organization.

Assessment Scheduling

The guided assessments are now being scheduled for May and June. Assessments will be performed by a three-person team, i.e., 2 facilitators and 1 notetaker. Assessment will be performed via Zoom.

**VRTAC-QM: R&R Pilot Project Team**: Carol Pankow, Crystal Anderson, Melissa Diehl, Ron Vessel, Katherine Hurley, and John Walsh

**Other Targeted TA of note:**

1. Assisted California Combined to resolve their corrective action related to their TPCAs. This has been a multi-step process to help them resolve their CAP findings in this area.
2. Worked closely with Oregon General on their contracts review and determination of whether or not these were compliant with contracting requirements and match. In addition, we sat in on all of the RSA monitoring sessions with the agency.
3. We provided internal controls training for the Oregon Blind staff and made plans for future training on DRAAN and Period of Performance.
4. We conducted a field training for Kentucky Combined on cost principles and internal controls. There were 320 staff present.

## Webinars and other web-based TA or Information:

1. We worked in partnership with the Summit Group this Quarter to present three discussion forums related to program and performance quality management and quality assurance. The topic areas included:
	* + - 1. Case file reviews
				2. Tracking pre-ETS
				3. Data validation
2. We have developed 13 podcasts on multiple QM practices and strategies that are available for download on our website and anywhere people listen to podcasts.
3. We have developed micro-trainings that are available on the website. These are quick 5-15 minute training and informational sessions.

## Trainings:

The summary of online trainings and CRC certificate completion is contained in Table 2:

Table 2

*Training Summary to date*

| **Training** | **Enrollment** | **Cert. of Completion** | **CRC Verification** |
| --- | --- | --- | --- |
| Ethics, Supervision, and Technology (QM2021-0301) | 305 | 134 | 134 |
| Managing the Shift (QM2021-0302) | 205 | 74 | 74 |
| Resolving Conflict (QM2021-0303) | 196 | 71 | 74 |
| Non-Delegable Responsibilities (QM2021-0305) | 123 | 7 | N/A  |
| SRC (QM2021-0306) | 218 | 49 | 38 |
| Data Validation (QM2022-0101) | 21 | 5 | 9 |
| Case File Review System (QM2022-0102) | 23 | 7 | 9 |
| Pre-ETS Tracking (QM2022-0103) | 30 | 7 | 11 |
| Credential Attainment Rate (QM2022-0301) | 292 | 76 | 0  |
| Coaching Strategies (QM2022-0302) | 66 | 14 | 24 |
|  | **1479** | **444** | **373** |

## Communities of Practice:

**Monitoring CoP:**

The monitoring CoP began again in 2022 with the new round of states being monitored. The agencies meet monthly to support one another through the process and describe what works and what is a challenge. There are detailed minutes of what the groups share with each other which are not included here so as not to violate anyone’s need for privacy when having the discussions. The participants share that this is a very beneficial process for them and that they appreciate being able to get together and act as support for one another.

**Supported Employment CoP:**

There are three communities of practice that are ongoing which are detailed below. We will be starting a case review CoP in Q3.

**Background:**

VRTAC-QM collaborated with George Washington University’s VR Center for Innovative Training (VR CIT) to help support the continuation of SE CoP meetings initially started under WINTAC in July 2017. VR CIT will be the lead agency in setting up, facilitating and record keeping for these meetings while VRTAC-QM supports these calls especially in the system’s level work involved with SE. In addition, staff from the VRTAC-QE and subject matter experts from Cornell University participate regularly in these calls as well. The SE CoP group now includes 30 individuals from 19 SVRAs and are held the third Wednesday every other month.

The SE CoP is an online exchange between State VR agency staff working on SE. The goal is to improve the delivery of SE services in their agencies in order to improve employment outcomes for those they serve. This CoP community serves as a forum for an exchange of ideas and information to assist members identify challenges in delivering SE services for their consumers and to share innovative approaches to address those challenges that are in alignment with the amendments of the Rehabilitation Act of 1973 as amended by WIOA 2014, and related sub-regulatory guidance from RSA including sharing monitoring preparation and post monitoring follow up assistance in addressing questions coming related to SE.

For this quarter, we met on March 16, 2022. Attendance included a total of 23 participants representing 13 SVRAs: LA-C, FL-G, AZ-C, CO-C, MS-C, MO-G, NE-G, MT-C, NJ-G, PA-C, KY-C, HI-C, and WA-G as well as representatives from CIT-VR, VRTAC-QM, VRTAC-QE, and the Yang Tan Institute at Cornell University.

**Meeting Summary for the March 16th SE CoP call:**

The majority of this call included an extensive round table discussion pertaining to what each state agency has in place for SE training requirements. 12 VR agencies shared what each of their strategies are and brainstormed possible future changes and improvements in this area. Several states discussed how they’ve been building SE training opportunities in coordination with their UCED’s. This discussion also included sharing how ACRE and CARF requirements relate to their requirements.

**Group formed consensus on addressing a variety of future agenda items:**

* Quality Assurance – Beyond training and accreditation, focus on quality performance.
	+ Discussion on systems of quality assurance that focuses on Employment Specialist performance at the service delivery level.   At the conclusion of our discussion on accreditation, this was a topical area that was touched upon and we would like to continue the discussion.
* Explaining what ACRE provides for certifying curriculum and APSE to certify practitioners (CESP)
* Part 2” of SE training; dive further into how states are partnering with University/UCED system’s to provide SE training, how they developed/defined their SE training credentials and how states can share more in this community regarding SE training such as CO did with NJ regarding their “CIE job-site evaluation tool and training”
* Related to above, consider having Darby share their “CIE Job-Site Evaluation” tool with this group if the SE CoP group is interested (probably ask this question at the next meeting and go from there so we can gauge interest first)
* Further sharing/discussion regarding how states are building their CRP capacity; i.e. concept of helping build it as a real profession with reasonable training expectations, pay, benefits, support, etc.
* Strategies they feel help address the major provider turnover issue that’s prevalent across the county. This is related to above but may have some separate strands such as the VR-Provider partnership aspects, etc.

**Customized Employment CoP:**

**Background:**

The goal of the monthly CE CoP meetings is to facilitate the exchange of information between state agencies that supports the improvement of Customized Employment (CE) delivery, sustainability and program evaluation. This CoP offers state agencies the opportunity to share information, progress, challenges and questions with other agencies who are implementing CE in their state. The CE CoP is lead jointly by VRTAC-QM and Cornell University. The VRTAC-QE also participates regularly.

 **Meeting Summary:**

The CE CoP met twice this quarter on January 26th and February 23rd. Consensus from the group was to change meeting frequency so we begin meeting every other month starting on February 23rd.

The following State VR agencies participated this quarter: Arizona C., California G., Colorado C., Florida C., Idaho C., Louisiana C., Kentucky C., Minnesota G., Missouri G., Montana C., New Jersey G., South Dakota C., Texas C., Virginia C., and Washington G., for a total of 15 VR agencies and 20VR staff. In addition, we had support from the following four TA centers: VRTAC-QM, VRTAC-QE, Cornell University and NTACT.

January 26th and Feb 23rd Agenda Summary:

* Updates from VRTAC-QM, VRTAC QE and Cornell University regarding TA support available
* State roundtable updates on a variety of topics including:
* Mandated training requirements for VR staff on Customized Employment
* Training/certification requirements for CE providers
* Quality control/fidelity in achieving high quality CE service delivery
* Provider capacity challenges in terms of turnover and cultivating high quality provider staff
* Developing more internal state capacity to deliver quality CE training and mentoring
* Utilizing provider CE CoP forums to help build provider quality and capacity
* Developing specialized independent contractors to provide CE services
* Developing incentives within rate setting structure to help acquire and sustain high quality providers
* Growing capacity for providing CE and developing a sustainable plan
* Partnering with CILs to explore group discovery
* Developing a tracking scale based on the Essential Elements of CE, to help ensure good Q/C for CE services
* Preliminary discussions about how Pre-ETS can interface with CE

## Distribution Lists:

The distribution lists for the VRTAC-QM lunched with the new website. As of March 31st, 2022 there were 1,732 people registered for the following lists:

* Program & Performance QM: 1,706
* Fiscal & Resource QM: 1,654
* General QM of Orgs: 1,669

## Executive Leadership Seminar Series:

The Executive Leadership Seminar Series began a new cohort this quarter, with 24 participants from several different SVRAs. The VRTAC-QM presented to the group on the WIOA performance indicators, using data to examine performance, make data-informed decisions, fiscal management of the VR program and the DSA-DSU relationship.

## Program Evaluation:

Full program evaluation results will be included in the program evaluation report that will be delivered 30 days after the submission of this report.

# Universal TA

Universal TA and training includes information on outreach activities, website development and analytics, and webinars or conference presentations that are intended for a general audience rather than a targeted to a specific VR agency.

## Website Analytics (1-1-22 to 3-31-22):

| **Overview** | **Counts** | **Quarterly Difference** |
| --- | --- | --- |
| Unique visitors |  2,446  | 491 |
| Page views |  11,796  | 2544 |
| Visits |  4,634  | 1212 |
| Returning Visitors | 9.8% | -15% |
| New Visitors | 90.2% | 15% |
| Pages per Visit | 2.5 | -0.16 |
| Average Duration per Visit | 0m 51s | 2 s increase |

**Top 10 Pages Visited**

| **Pages** | **Page Views** | **Percentage** |
| --- | --- | --- |
| 1. Home
 |  2,802  | 24% |
| 1. VRTAC-QM Training
 |  738  | 6% |
| 1. Program & Performance Quality Management
 |  483  | 4% |
| 1. About Us
 |  422  | 4% |
| 1. Training Portal
 |  404  | 3% |
| 1. VR Program Fiscal Management
 |  396  | 3% |
| 1. Fiscal & Resource Quality Management
 |  361  | 3% |
| 1. Data Tools & Resources
 |  254  | 2% |
| 1. Community of Practice
 |  223  | 2% |
| 1. WIOA Performance Accountability System
 |  191  | 2% |

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

| **Region** | **Totalusers** | **New users** | **Engaged sessions** | **Engagement rate** | **Event count** |
| --- | --- | --- | --- | --- | --- |
| 1. Wyoming
 | 363  |  354  |  411  | 94% |  2,197  |
| 1. Virginia
 | 251  |  244  |  402  | 86% |  3,996  |
| 1. Florida
 |  92  | 77  |  193  | 83% |  1,950  |
| 1. Minnesota
 |  40  | 25  |  172  | 80% |  2,212  |
| 1. California
 | 134  |  126  |  152  | 92% |  1,030  |
| 1. Washington
 |  94  | 83  |  152  | 84% |  1,392  |
| 1. New York
 |  67  | 58  |  149  | 87% |  1,478  |
| 1. South Carolina
 |  30  | 24  |  145  | 91% | 717  |
| 1. Georgia
 |  25  | 23  |  120  | 76% |  1,827  |
| 1. Pennsylvania
 |  56  | 43  |  104  | 82% |  1,051  |

## Universal TA of Note in the 2nd Quarter:

1. The NCSRC had a national zoom training to introduce the SRC training series we developed to their membership. The following SRC's are using this to help onboard their new members. New Mexico, Wisconsin, Washington, Pennsylvania, Connecticut, NC, Iowa, and Delaware. 36 total
2. Presented to the national community of practice of SVRA training coordinators on the QM and the multiple initiatives we have. 60 people total.
3. Worked in collaboration with John Walsh from the Center for Innovation Training in Vocational Rehabilitation (CIT-VR) to develop and facilitate a training on coaching strategies for performance excellence and organizational effectiveness. This is available to all agencies and staff.
4. Completed a universal tool to use as agencies develop blind and general agency agreements.
5. New York State Legislature - contacted by our partners at Cornell and was asked to review proposed bill which resulted in a call with them to discuss recommendations in order for the bill to not conflict with federal legislation - bill aims to require VR and or ED to pay for vended services during the school day.
6. We developed a tool for VR directors to use when reviewing the RSA 17 so they understand what they are signing.
7. We presented as the Leadership Forum- Five Greatest Fiscal Challenges Facing – 202 people present.
8. We created 13 podcasts, resulting in more than 1,876 downloads.

# Collaboration with other TA Centers

We continue to lead collaboration efforts among the TA Centers as evidence by the following:

1. We have joint ITAAs with the NTACT:C in three agencies: Kansas, Pennsylvania and Hawaii (in the 3rd Q).
2. We work closely with the CIT-VR for multiple trainings including supervisor training and webinars, the monitoring CoP and others.
3. We developed joint webinars with the NTACT:C:
4. We meet with the VRTAC-QE on a bi-weekly basis to review joint VR agencies and keep each other informed; and
5. We continue to lead the TAC collaborative monthly calls and to meet with the VRTAC-QE on a monthly basis.

# Special Projects

This section includes information on the progress of our three special projects. Each of these projects made progress in their development in the second quarter.

## Community Reinvestment Act Project:

The CRA project continues to meet with banks and SVRAs to discuss the creation of programs and the use of CRA dollars for programs to serve individuals with disabilities. NDI has made significant progress this quarter and has indicated that they believe they will have two SVRAs set up as pilots by the end of this calendar year.

## SARA Project:

SARA (<https://saraworks.com>) proved to be a great success for the WINTAC grant with all three of three pilot areas not only completing the pilots, but also expanding to state-wide usage and self-funding.

For the VRTAC QM grant, we wanted to put SARA to further use by applying it to the Ticket to Work (TTW) program. We devised a pilot program designed to increase TTW efficiencies, increase program revenues and decrease administrative work associated with the program.

To our surprise, although the reception of SARA has been great, not so much for the TTW program. We have approached Washington Blind. Montana, Nevada, Alaska, Mississippi, Indiana, Virginia Blind, Wisconsin and Texas and none of them have turned into pilots. A large part of the problem appears to be that whereas states appreciate the additional TTW income, it is not a program high on anyone’s priority list. In short, it seems to be a program that whereas it is appreciated, it is not particularly popular.

**New Plan**

Whereas we would like to better leverage the power of SARA for VR agencies within the framework of VRTAC QM, we have reconsidered the approach to states, and in particular, re-frame the SARA pilots to address current, front and center, pain points. These include:

* Using real-time data to shorten time in service levels
* Implementing continuous customer satisfaction surveys to improve outcomes and satisfaction levels
* Improving quality management by introducing management to real-time performance data

**Choosing Pilot Agencies**

When we promoted the availability of SARA pilots for WINTAC, we received thirteen application for three slots. The three slots were filled on a first-come, first-served basis, which is not ideal for selecting pilots where we want to show something.

This time around we want to do it differently in order to apply lessons learned to the concept of quality management, especially as it deals with measurable outcomes.

We know that SARA can improve communication with consumers and can keep them engaged in the VR process, which helps produce better outcomes. We are asking for RSA to approve this shift in focus for the pilot projects.

## Employment First Systems Change Project:

The intent of providing TA in this area is to assist state’s effectively utilize the EFS within their state to maximize the coordination, multi-partner sequencing of services and leveraging of cross-agency resources in order to achieve successful competitive integrated employment outcomes for all agencies involved. In the context of employment of people with disabilities, it offers a holistic, deliberate approach to examine how inter-related public and social systems work in concert to get the outcomes we all want – competitive integrated employment.

**Activity summary for this quarter:**

* Montana work picked up significantly this quarter as their State moves to an Employment First model.
* South Carolina General work continues with multiple partners.
* Work with both MI General (MRS) and MI Blind Services (BSBP) on CE sustainability continues with the intent of strengthening the relationship between all partners.

# Part 2: Significant program outcomes from October 1, 2021 to March 31. 2022

Table 3 contains the current status of the VRTAC-QM’s progress in meeting the work plan goals and objectives for Year 2. Where the goals are not met, there will be a discussion of why following. Please note that we added several deliverables in this work plan that were not identified when this was submitted originally. These represent significant products that we felt was important to include in this report.

Table 3

*Current Work Plan Status as of March 31, 2022*

|  |
| --- |
| **Year 2 Semi-Annual Report on Work Plan Progress** |
| **Domain: Knowledge Development** |
| **Activity** | **Outcome** | **Status** |
| Develop the Cooperative Agreement with RSA | Completed Cooperative Agreement | Complete |
| Establish website  | Website launched | Complete |
| Establish VR Wellness Check Tool | Benchmark-QM complete | 75% complete |
| Survey all SVRAs on QM needs and priorities | Survey completed | Complete |
| Comprehensive Review of quality management program and fiscal strategies and practices  | Completed review | Complete |
| Identify gold standard benchmarks for the VR Wellness Check using analytical framework and selection criteria | Benchmarks identified and populated in Benchmark-QM | Complete |
| **Domain: TA and Training** |
| **Activity** | **Outcome** | **Status** |
| Management Concepts grants management training available to all SVRAs | Training is available through the VRTAC-QM website | 3 of 4 courses available |
| QM seminar series training provided for varying levels of managers in the VR program | Leadership training established | Complete |
| Targeted and universal TA is provided to SVRAs on quality program and fiscal management | Delivery of TA using website and other methods | Continuous- Targeted TA provided to 3,138 VR staff in 358 events. More than 10,000 accessed some form of universal TA (website and webinars) |
| Establish CoPs in quality program and fiscal mgmt. | CoPs established and meeting | Continuous - 3 CoPs active. Fourth CoP beginning |
| **Activity** | **Outcome** | **Status** |
| Establish RSA Monitoring CoP | CoP established and meeting. Helping agencies to understand the monitoring process and support one another through the process. | Complete and renewed each year with a new round of agencies being monitored. |
| Continue supported employment CoP | CoP meeting and sharing information and best practices related to SE. | Complete and ongoing each year |
| Continue customized employment CoP | CoP meeting and sharing information and best practices related to CE. | Complete and ongoing each year |
| Conflict Resolution Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| Ethics, Supervision and Technology Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| Managing the 15% reserve Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| NOI webinar in partnership with NTACT C | Webinar complete, posted on website and viewed by VR staff | Complete |
| Non-Delegable Responsibilities and Organizational Structure Unpacked Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| Peer to Supervisor Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| Remote Supervision Webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| SRC (4 part series webinars) | Webinar complete, posted on website and viewed by VR staff | Complete |
| Credential attainment webinar | Webinar complete, posted on website and viewed by VR staff | Complete |
| Develop training in partnership with the VR Summit Group for case reviews, pre-ETS and data validation | Completed training posted to the website that develops skills of VR staff in the identified areas. | Complete |
| Provide eligibility and IPE training for VR agencies | Completed training that improved timely eligibility determinations and IPE development and increases quality outcomes. | Provided to Kansas, Iowa Blind, Montana, Wyoming and Hawaii. Ongoing for agencies as requested |
| **Activity** | **Outcome** | **Status** |
| Develop Rehab Data workgroup tools in partnership with RSA | Completed tools for use by VR program staff | MSG, pre-ETS, and trend data tool completed. |
| Prior approval tool | Completed tool available on the website to help agencies ensure they successfully complete and receive prior approval | Complete |
| Monitoring checklist in general review area and fiscal area | Completed tool on the website and available for use by VR agencies that helps them prepare for monitoring. | Complete |
| Staff time and effort reporting tool | Completed tool available on the website for use by VR agencies to report time and effort and reduce errors in staff time reporting | Complete |
| Manager Minute podcasts | Completed podcasts on a variety of quality management topics that are recorded and posted to the website that can be accessed by VR staff to increase identification and adoption of QM strategies and practices. | 13 complete with many others on the way |
| Monitoring prep workbook | Completed workbook available on the website to help VR agencies prepare for monitoring. | Complete |
| Create micro trainings | Develop micro-trainings on quality program and fiscal management for use by VR staff on the website and that will help them identify and adopt QM strategies and practices | Three complete and several in-development |
| Provide intensive TA and training on quality program and fiscal management | SWOT analysis and ITAA completed for each SVRA | 8 ITAAs completed and 10 SWOTs completed  |
| Conduct the SARA SSA reimbursement pilot projects | Pilot started in 4 SVRAs | Refocusing on QM of agencies instead of SSA reimbursement  |
| Conduct the CRA pilot projects in 4 States | Pilot started in 4 SVRAs | Delayed |
| **Activity** | **Outcome** | **Status** |
| Conduct the EFSC pilot projects in 4 States | Pilot started in 4 SVRAs | Slow progress in Montana and South Carolina. Targeted to date. |
| **Domain: Coordination and Dissemination** |
| **Activity** | **Outcome** | **Status** |
| Establish QM committee | Committee est. and meeting | Complete |
| Collaborate with VRTAC-QE and other TACs to support learning and KD and KT. | Number of TACs and other projects contacted and engaged | 3 formal partnerships in an ITAA with NTACT:C |
| Conference presentations with special focus on Y5 | Completed presentations | 10 conference presentations to date including CSAVR, NCSAB and NCRE |
| **Domain: Program Evaluation** |
| **Activity** | **Outcome** | **Status** |
| Ongoing PE using quant. and qual. methods | Completed eval. methods | Ongoing |

The VRTAC-QM is on track to meet all of the objectives and outcomes identified in the Year Two work plan except for the following:

* + - 1. The launch of the Management Concepts training was delayed due to revision of the content, but three of the four required courses are available as of this writing. The fourth course will be available in Year 3.
			2. The CRA and SARA special projects have been delayed in starting. The CRA project is making substantial progress and should begin prior to the end of this year. The SARA project is refocusing on management of the VR program rather than the SSA reimbursement, so we expect progress here by the end of the year.
			3. The Benchmark-QM, now named the VR Wellness Check, was delayed because of review. We anticipate that it will be complete either in the fourth quarter of this year or no later than the first quarter of Year 3.

## Progress with Supplement:

The VRTAC-QM received a supplement from RSA to help meet the demand for TA and training in Year 2. This supplement was critical and essential for us to be able to develop the ITAAs we did and to meet the targeted demand for TA. In the tables below we compare our original targets in our Cooperative Agreement with the revised targets with the supplement and our progress in meeting these new targets to date.

Table 4:

*Project Measures*

|  |
| --- |
| **Project Measure 1: Number of ITAAs signed and in progress during the project year** |
| **Project Year** | **Original Target** | **Target with Supplement** |
| 1 | 3 | 3 |
| 2 | 5 | 7 |
| 3 | 5 | 7 |
| 4 | 5 | 7 |
| 5 | 18 | 24 |
| **Total as of 3-31-22** | **8** |
|  |  |
| **Project Measure 2: Number of ITAAs completed during the project year** |
| **Project Year** | **Original Target** | **Target with Supplement** |
| 1 | 0 | 0 |
| 2 | 1 | 1 |
| 3 | 2 | 2 |
| 4 | 6 | 6 |
| 5 | 9 | 15 |
| **Total** | 18 | 24 |
| **Total as of 3-31-22** | **0** |
|  |  |
| **Project Measure 3: Number of SWOT assessments and reports completed** |
| **Project Year** | **Original Target** | **Target with Supplement** |
| 1 | 3 | 3 |
| 2 | 5 | 7 |
| 3 | 5 | 7 |
| 4 | 5 | 7 |
| 5 | 0 | 0 |
| **Total** | 18 | 24 |
| **Total as of 3-31-22** | **10** |

|  |
| --- |
| **Project Measure 4: Number of courses taken by SVRA towards the VR Grants Management Certificate program through Management Concepts** |
| **Project Year** | **Original Target** | **Target with Supplement** |
| 1 | 0 | 0 |
| 2 | 270 | 270 |
| 3 | 340 | 340 |
| 4 | 360 | 360 |
| 5 | 380 | 380 |
| **Total** | 1350 | 1350 |
| **Total as of 3-31-22** | **0** |

|  |
| --- |
| **Project Measure 5: Number of targeted training and TA events on QM provided and the numbers of participants during the project year** |
| **Project Year** | **Original Target Number of Participants** | **Target Number of Participants with Supplement** |
| 1 | 100 | 100 |
| 2 | 125 | 250 |
| 3 | 125 | 250 |
| 4 | 140 | 300 |
| 5 | 100 | 200 |
| **Total** | 590 | 1100 |
| **Total as of 3-31-22** | **4,262** |

## Website Statement

The VRTAC-QM website is fully established and content is added daily. All products produced and on the website meet the government and industry-recognized standards for accessibility. Our IT team goes well beyond the minimum required by law and ensures all content generated by the VRTAC-QM is screen-reader friendly.

## Part 3: Significant program activities, outputs, products and outcomes anticipated between April 1, 2022 and September 30, 2021

The VRTAC-QM anticipates that the following activities, outputs, products and outcomes will occur between April 1, 2022 and September 30, 2022:

Completion of at least three more ITAAs (Hawaii, Florida General and either New Mexico General, Kentucky Combined or South Carolina General or all three));

Launch of the VR Wellness Check;

Launch of Management Concepts courses;

Completion of the fourth course development for MC;

Provide targeted and universal TA to multiple SVRAs and personnel;

Create more online and in-person training in partnership with other TA Centers;

Develop additional content for the website; and

Continue development of the special projects.

## Part 4: Challenges, opportunities and emerging issues

The challenges noted in previous reports continue, though the additional staff we were able to hire thanks to the supplement funds have been very helpful. We have been doing research into issues affecting the performance of the VR program as we emerge from the pandemic and we will continue to develop training and provide TA on these topics.

## Part 5: COVID-9 Impact

The impact of COVID has not been significant on us as a Center. Travel is picking back up and we continue to observe all safety protocols and CDC guidance when we work with agencies.

# Section B: Work Plan

The Year 3 Work plan is included in Table 5.

Table 5

*Year 3 Work Plan*

|  |
| --- |
| **Year 3 Work Plan** |
| **Domain: Knowledge Development** |
| **Activity** | **Outcome** | **Projected Completion** |
| Finalize and launch the VR Wellness Check tool | Wellness check complete and available on the website for use by VR agencies.  | Q1 - Q2 |
| Conduct research on issues related to the quality management of the VR program and develop related TA and training | Completed research and informational or training products available to VR agencies on emerging topics related to quality management. Full research on rapid engagement complete in Year 3 | Ongoing but rapid engagement and supervisor leadership to be completed in Year 3 by the end of the year. The nature of this element is that the topics change as they emerge as needs for the VR agencies and the improvement of the program |
| **Domain: TA and Training** |
| **Activity** | **Outcome** | **Projected Completion** |
| Management Concepts grants management training available to all SVRAs | At least 300 instances of courses completed by SVRA personnel | 3 of 4 courses available in Q1 |
| Complete development of the fourth and final course in the VR Grants Management Certificate program | Completed course | Q2 |
| QM Executive Leadership Seminar Series training completed for the existing cohort and beginning for a new cohort | One cohort completed and one beginning. Leadership skills and knowledge increased for participants | Existing cohort completes in Q2 and new one begins in Q2 |
| Deliver universal TA to SVRAs | Readily available information and resources on quality management strategies and practices on the website and through podcasts, social media, webinars and conference presentations. | Ongoing in Q1-4 |
| **Activity** | **Outcome** | **Projected Completion** |
| Deliver targeted TA to SVRAs  | SVRA staff increase their knowledge of quality management practices and strategies and implement them to improve service delivery and outcomes. | Continuous throughout the year. It is expected that the numbers receiving targeted TA may reduce somewhat from Year 2 as more resources are directed to intensive TA. The total will be well above the Cooperative agreement targets. |
| Establish CoPs in quality program and fiscal mgmt. | Continuation of the monitoring, SE, and CE CoPs, with the addition of the case review CoP | Continuous - Case review active in Q1 |
| Launch the recruitment and retention pilot project | Assist four SVRAs to develop a recruitment and retention plan to ensure that quality management strategies and practices are in place that will maximize the ability of the agencies to recruit qualified staff and retain the staff they have. | Begin by Q2 and then ongoing through the life of the project |
| Develop fiscal fitness training in various topics | Fiscal fitness trainings on Period of Performance, Waiver of statewideness, Blind and General agency transfer and other topics | Continuous in Q1-4 |
| Develop rate-setting and contract development guide | Completed guides that will result in acceptable rate-setting methodology and improved contract development | Q1-2 |
| Develop program and performance micro-trainings | Micro-trainings completed and available on the website on WIOA Section 116 | Ongoing in Q1-4 |
| Complete data quality and literacy training for VR | Completed training available on the website | Q2 |
| Provide intensive TA and training on quality program and fiscal management | SWOTs conducted and ITAAs developed for 7 additional SVRAs | Q4 |
| **Activity** | **Outcome** | **Projected Completion** |
| Conduct the SARA pilot projects in 3 agencies | Pilot started in 2 SVRAs by the end of Year 3 | Q4 |
| Conduct the CRA pilot projects in 4 States | Pilot started in 2SVRAs b the end of Year 3 | Q4 |
| Conduct the EFSC pilot projects in 4 States | Pilot started in 3 SVRAs by the end of Year 3 | Q4 |
| **Domain: Coordination and Dissemination** |
| **Activity** | **Outcome** | **Projected Completion** |
| Collaborate with VRTAC-QE and other TACs to support learning and KD and KT. | Number of TACs and other projects contacted and engaged | Ongoing |
| Conference presentations with special focus on Y5 | Completed presentations | Ongoing throughout the year |
| **Domain: Program Evaluation** |
| **Activity** | **Outcome** | **Projected Completion** |
| Ongoing PE using quant. and qual. methods | Completed eval. methods | Ongoing |