Pre- Employment Transition Services STRATEGIC PLANNING: A COLLABORATIVE APPROACH – Part 2

BRENDA SIMMONS: OK. Hi, everyone. I'm Brenda Simmons with the George Washington University Center on Rehabilitation Counseling, Research, and Education and the National Technical Assistance Center on Transition the Collaborative, or NTACT:C. Welcome to the second of a two part webinar series on pre-employment transition services. Strategic Planning: A Collaborative Approach.

This particular webinar series provides guidance to state vocational rehabilitation agencies who may be interested in implementing a strategic planning approach to evaluating their existing Pre-ETS service delivery model and programs.

We focus on the importance in this webinar of taking a collaborative approach, not only internally, but also externally with education and other key partners to ensure all aspects of implementing meaningful Pre-ETS services are considered moving forward.

While we hope that you had an opportunity to view the first webinar prior to watching this one, it's certainly not a requirement. However, since these webinars are recorded separately, we do encourage you to go back and review the first webinar in this series if you have time because there's really a lot of good information regarding the specific strategies outlined within the Pre-ETS strategic planning guide that state PR agencies might want to use in implementing strategic planning.

This particular strategic planning webinar series was developed with support from the Center for Innovative Training in Vocational Rehabilitation at the George Washington University, the National

Technical Assistance Center on Transition the Collaborative, and the Vocational Rehabilitation Technical Assistance Center for Quality and Management.

Since these webinars are recorded and you won't really have an opportunity to ask questions live, we encourage you to pause the recording at any time and jot down any questions or comments that you might have. And then, send those to any of us on the Pre-ETS team here at George Washington University. Our contact information is on the last slide of the PowerPoint slide deck.

I also wanted to mention that you'll be able to receive a CRC certificate of completion for one hour of continuing education, which will be issued for each session of this two part training series upon completion of that evaluation in Quest. It is being closed captioned and a transcript will be available upon request.

Please keep in mind that although there are two separate webinars, there is only one PowerPoint, which includes both part 1 and part 2 of this webinar series. We've also developed a Pre-ETS strategic planning guide that highlights key strategies that state VR agencies might want to consider in this whole strategic planning process.

The webinar today, which is part 2, will begin on slide number 30 of this PowerPoint slide deck. So if you want to follow along, move to slide number 30. And we are excited to be able to highlight the state of Idaho who will share their own perspective and what it's like to take a more strategic planning approach to evaluating their Pre-ETS services, highlight what worked, as well as challenges along the way as they continue to move forward in the successful provision of Pre-ETS services.

I'd now like to introduce our main presenters for today's webinar, Brigid Griffin, Sandy Miller, and Alison Lowenthal. Brigid and Sandy are two of my colleagues at the George Washington University and the National Technical Assistance Center on Transition to Collaborative. And they will be joined today by Alison Lowenthal, the transition coordinator for the Idaho division of Vocational Rehabilitation. And I think they all gave me a little wave there. Thank you.

I'm also very excited to welcome Jackie Hyatt. Jackie is a technical assistance specialist with the NTACT:C here at the University of North Carolina in Charlotte. And Jackie is going to lend her expertise in helping me facilitate the conversation with Idaho and provide a little bit of a backstory regarding how Idaho began their initial steps toward strategic planning.

So now, with all of that, I am going to turn it over to you, Sandy, to get us started.

SANDRA MILLER: Great, thank you so much, Brenda. And thank you everyone for joining us today. As Brenda mentioned, this is part two of the series. And what we're going to cover in today's discussion is really just a brief overview of the importance of data sharing and analyzing the impact of pre-employment transition services.

Then, you're going to hear from Allison, as Brenda mentioned, about Idaho's experience with strategic planning. And we're going to wrap it up and give a few points about collaborating with education. And then, moving this work forward. So thanks again for joining us, and I'm going to pass it over to Brigid to kick it off.

BRIGID GRIFFIN: Hi, everyone. It's nice to be back with you again. Just as we defined strategic planning in the first webinar, let's talk about what's meant by data sharing. The first webinar emphasized the importance of gathering meaningful data to report on activities as well as to tell a meaningful story about what's currently happening in your agency.

The term data sharing simply refers to the ability to share the same data resource with multiple applications or users. Although this definition sounds simple, it's never quite that easy. And data sharing must be done within legal frameworks that ensure security and protection of sensitive information.

Organizations and agencies don't exist in a vacuum. Indeed, we talk a lot about mandates to collaborate with our partners from collaboration with general and blind agencies in a state, collaboration with education, workforce development agencies, juvenile justice, et cetera. As each

entity collects its own data, there are instances where combining data from different sources can increase the performance and value of services. Next slide, please.

When we think about the story that data can tell us, we're really trying to answer questions about what worked, what didn't work, and where we might want to concentrate more of our efforts. Let's consider where we get data that will help us answer those questions. There are so many sources of data and it can be gathered at various points along the way.

Consider collecting information from a student advisory board or a focus group. Surveys can also offer a good way to collect data, and this can include surveys to schools and other education partners as well as surveys to students and to parents or families of students with disabilities.

You can also gather information from meetings with representatives from parent training and information centers, your SRC, independent living centers, and community rehabilitation programs, the State Education Agency, and your providers.

Remember that you are also collecting lots of data for RSA reporting purposes, and this is a great source of information for internal decision making. You can use your data reports and tools like the data dashboards to paint pictures about-- for your staff about services that they are providing.

We talked a lot in the first webinar about gathering data through data sharing agreements between state education and VR agencies to help us identify numbers of students with disabilities in a state, the distribution of those students, as well as milestones that those students reach. So lots and lots of sources for data, as you can see.

Moving along, let's talk a little bit about one tool that is accessible to all VR agencies. The RSA RehabData Workgroup developed the Pre-Employment Transition Services Data Tool. There's a link to the rehab data work group in this slide as well as a link to the tool itself. We really just want to bring this tool to your attention as another source of data that you can use within your state.

It provides both national and state level data relating to the provision of pre-employment transition services, and can be used by state agencies to analyze their Pre-ETS implementation and service delivery and compare it to national data. You could also use it to compare to similar states and agencies and in a variety of additional ways.

If you want to learn more about this tool, you can see on this slide that there is a link to a presentation that was developed by the Rehab Work Group and the accompanying slides are also linked here as well.

One other thing that was developed by this work group is a guide called "Other Measures that Matter." Measures on pre-employment transition services provide information about students who have access Pre-ETS as potentially eligible and those who have accessed them as eligible students.

It also talks about the number of students served as potentially eligible who later moved on to become applicants to the VR program. This information might be able to help answer questions you have in relation to your continuum of VR services.

Let's think about what data schools can help share to fill in the gaps and how can your-- can VR and education use that data to better serve students and families in transition planning and pre-employment transition services?

Schools may provide data about the numbers of students with disabilities accessing CTE, which could disclose inclusivity issues and prompt both entities to think about ways to support student participation. Comparing profiles of students served by the school and the VR agency can either confirm that the very agency is reaching a good proportion of students or expose some gaps. Use the data to help guide the direction of future pre-employment transition services and VR services and what changes are implicated by that data. Next slide please, Brenda.

In addition to looking at all of the data provided from multiple sources that we've referenced so far, we really were thinking about quantitative data. Data that you can put numbers around. But let's

not forget about anecdotal data. This can really help tell the story of an agency, too, in how services are being delivered.

Your program is more about just numbers, right? So you want to listen for the stories that you're hearing from students, from parents, and from teachers that really give a rounded out view of your agency. These stories can be used to inform what's happening well in your agency as well as maybe pointing out some things that you could do better with.

So I just want to remind you that sometimes success stories or other things can be measured by data. This can come in the form of casual feedback from parents and teachers and students, as we mentioned, and it shouldn't be overlooked.

All right, I'm going to hand this back to Sandy to talk about analyzing impact.

SANDRA MILLER: Thanks, Brigid. That was a really helpful overview of the different types of data that states can consider in their strategic planning. As we move on to discuss the impact of pre-employment transition services, data is certainly a critical component of the analysis.

So maybe you're just starting to collect data or maybe you have been and are now ready to really look at what the data is telling you. Either way, you can look at it on several levels and identify your needs or gaps and establish some priorities. What might the data offer in terms of the impact Pre-ETS is having on the individual students being served, the staff providing the services, and the VR program as a whole. Ultimately, you want to know if what you're doing is working and then adjust accordingly.

So let's move on and look at the students who are participating in Pre-ETS. What is the impact these services are having on them? What are the students achieving? For example, for students participating in post-secondary education, are more of them connecting with the support services they need? Are students exiting their programs successfully? And are they getting jobs in their field of study?

You could also look at whether or not students are applying for VR. If they are, is the data indicating that students need fewer services? Perhaps the cost per case is declining or maybe they're spending less time in the VR process. Are you able to tell that students have more tangible career goals and are achieving outcomes aligned with their goals?

These are all just questions to consider and I'm sure you can think of plenty others. But these can help as you begin to analyze the data related to students who are receiving Pre-ETS. You can also look at the impacts Pre-ETS is having on staff who are providing the services.

When you think about staff, what is it that you've learned about performance? Are there clear expectations related to pre-employment transition services and does staff have the understanding and the tools needed to track and report their work? Is this reflected in performance evaluations and are case review instruments or other tools updated to include Pre-ETS? And what about staffing resources?

Are there more students being served? Have applications increased or decreased? How is serving potentially eligible students affected staff capacity with regard to caseload assignments? And what are staff doing differently or maybe they're doing a lot more of something?

So how can your analysis of the data inform your strategic planning when it comes to the impact on staff and really help you identify where you need to focus your attention and resources?

Next, we're going to look at the impact of Pre-ETS on the VR program as a whole. Is data being used to make decisions or are decisions based on your assumptions? What's really driving or planning? Again, data is so important to providing an understanding of what's actually happening with regard to your programs and services.

So what is your data telling you and what strategies can be implemented to mitigate the impact? Has your analysis provided any information that could help you modify your service delivery methods? We receive a lot of questions related to rate setting and cost, so we know states are realizing that this is an area they can adjust to lessen the impact.

Are you evaluating what services are yielding results versus those that aren't? And how can you leverage your partners? In part one of the series, we discuss the benefits of collaboration. So what will help you and your partner sustain the work? And then, finally, it's important to consider progress and the impact Pre-ETS is having on outcomes.

Thank you, Brenda. At the service level, you can look at what's yielding results. Here, you may want to analyze how the Pre-ETS was provided, whether it was provided in-house or it was a purchased service. And then, we can see the impact that different delivery methods have on students.

At the student level, it's harder to identify the impact on students who don't apply for services. For the potentially eligible students with disabilities who don't apply, can you request wage data from your labor partners to see what's happening with them? Are you analyzing the impact of Pre-ETS on the performance measures and looking at those students with disabilities who become participants? And any correlations between the Pre-ETS services they receive and attainment of measurable skills gains or any kind of credentials.

And at the program level, this may be where you want to spend a lot of time with regard to your strategic planning. You want to consider your expenditures in the context of the reservation requirement and the additional VR services that can now be allocated based on the notice of interpretation. In part 1, we discussed the financial forecast. And this can play a critical role in helping you determine the impact Pre-ETS is having on your overall budget.

You'll want to consider human resources as well. Caseload sizes, time studies, how much time is actually being spent on service delivery. And of course, you'll want to think about the sustainability of your current model for Pre-ETS services.

So now, I'm going to turn it back over to Brenda so you can hear firsthand about Idaho's experience.

BRENDA SIMMONS: Awesome. Thanks, Sandy and thanks, Bridget. I think it really provided a great foundation to talk a little bit about data sharing and analyzing the impact of that data. Because I'm sure Alison is going to be talking about that in a little bit more detail.

So thank you guys for that information. Now, let's take an opportunity to really hear from Idaho. Alison, would you please share a little bit more first about and you and about this great state of Idaho. And then, we'll dive into this.

ALISON LOWENTHAL: Happy to do so, Brenda. Thank you and thank you guys for having me. As Brenda said, my name is Alison Lowenthal and I am the state transition coordinator for Idaho. I am really looking at coordinating the services for pre-employment transition services as well as youth transition services.

My background actually is not VR. My background is education. I came from the State Department of Education here in Idaho. And then, fortunately, found a wonderful place to be with Idaho DVR as their transition coordinator.

BRENDA SIMMONS: Woo hoo. Awesome. OK, well, are you ready to keep going here, Alison?

ALISON LOWENTHAL: Happy to.

BRENDA SIMMONS: OK, well, what we would love to hear a little bit more about is the work that you all have been doing in Idaho, honestly, prior to even reaching out to NTACT for assistance with strategic planning. So can you give us a little bit of that back story?

ALISON LOWENTHAL: Yeah, happy to do that. As with every state and trying to look at our pre-employment transition services and how we were providing them and really looking at the information coming out of RSA, we decided to first start with, what are the expectations for our RSA and how are we meeting them based on the data dashboards that are RSA was providing us?

So we started looking at those first. So those quarterly data dashboards that are real helpful. And then, looking at that data and then comparing it to our AWARE data. Are AWARE is our system for how-- our case management system. And so we looked at that.

We also looked at our fiscal forecast. We are a state that we are able to utilize pre-authorized funds through our fiscal forecast. But trying to understand and know where each of the components of our services were being spent at.

We also pulled in some State Department of Education Indicator 14 data to see if we can make comparisons towards the increased post-school outcomes of students who had participated with pre-employment transition services.

We were able to add questions on to our Indicator 14 collection tool that included asking if students had participated in any voc(ational) rehab services. So trying to help get a better idea for that. The biggest thing I think we gain from looking at this data was we needed to do strategic planning. We found that we had holes, some inconsistencies, some questions that we really weren't sure. And wanting to figure out what are the best ways that we can move forward so we can make sure that we meet the mandate of WIOA. So from looking at that data, it was determined to do strategic planning.

BRENDA SIMMONS: OK, awesome. And I think what I would like to do now is really have an opportunity to bring in Jackie into this discussion a little bit. Because Alison, I know that when Jackie reached out to me, she'd already been talking with you.

And you all had already had some really good conversations about-- and honestly, I think Jackie really helped you, Alison, craft what are some of the next steps that we need to do now that we're thinking, yeah, we need to do some strategic planning. How do we move forward? And so, Jackie, I'd love for you to share a little bit about how you started working with them in beginning to build that strategic planning team.

JACKIE HYATT: Sure, I'm happy to. And one of the roles that I've played with NTACT throughout the years is a connection for Idaho. I live in Idaho. I have to disclose that. And so I have a natural connection and I did work at the State Department of Education.

But that's all-- I'm sharing that just to show that we do provide that connection of ongoing conversation. And through that support, Alison and the folks-- administrators within DVR really started talking about how they could start to identify the areas of need. And we talked about the partners that they would want to bring to the table and started to identify a process.

And it was really-- quickly we saw that having Brendan at NTACT engaged in that process-- because we were still at that time two separate centers-- was really helpful to have that cross collaborative conversation.

BRENDA SIMMONS: Yeah, and so Alison and Jackie, do you want to talk a little bit more about some of these folks that you identified that were on this team that you thought were really good partners to have?

ALISON LOWENTHAL: Yeah, so I can go ahead and start. And then, I want to talk-- I ended with WINTAC and NTACT and talk a little bit more about that. When I was looking at building a team, obviously, it's going to start with our leadership. So but we have our IDVR administrator and deputy administrator who are two leaders.

The deputy administrator really oversees our Pre-ETS and transition services. But our administrator actually wanted to really be involved in this process as well. And so they were, obviously, the first people that we went to.

Next, our field services manager. He oversees all of our field services and how can you not have him a part of the conversation and the discussion. And then, obviously, myself who manages transition. We also really wanted regional field staff input. The people whose boots were on the ground, who are doing the service, who are finding the students that we're working for.

We pulled those individuals. At that time, we had a transition leadership team. And I'll talk a little bit later about how that's-- transition leadership team has morphed into something else. That had to do with a lot of the strategic planning.

But we pulled individuals from the transition leadership team. Transition leadership team was developed by having a representative from each region. We have eight regions in Idaho. And the region decided who that member of that leadership team was. So they were not identified through the central office. But rather, the region identified who that leader was going to be. So those members-- those eight members of that leadership team participated in a part of this as well.

We also felt it was very important to bring in our sister agency, the Commission for Blind and Visually Impaired. So they participated. We as, of course, is important brought in our State Department of Education secondary transition coordinator.

We included our Idaho Education Services for the Deaf and Blind. Our Parent Center, we have a wonderful, wonderful Parent Center in Idaho. And we have a very strong relationship with them and really felt that that parent piece needed to be a part of the strategic team as well.

We have our Idaho Council on Developmental Disabilities who played a part also. Really wanted to make sure we were covering multiple types of disability needs and having that voice in the room. And then, lastly, we had WINTAC. We had Brenda Simmons come from WINTAC and Jackie Hyatt come from NTACT.

And really, for me, when I was looking through this process, one of the things that I've known and what I've experienced when doing strategic planning in the past is if it's not facilitated by someone else, it doesn't work. And so I did not want to be the person that was facilitating the strategic planning meeting because I felt like, in that case, it would have been mostly my voice that was heard in the plan.

Whereas, I really wanted it to be the voices of other people who were in the room and really have someone that could hear the other voices in the room. So I approached Jackie. And as Jackie

said, we have a longstanding relationship. And really started talking to her about, hey, is this something that you think WINTAC and NTACT could provide for us? Your guys' knowledge and understanding of Pre-ETS brings so much to the process and what we're looking at and you understand where we're trying to go.

And so I thought hiring a facilitator with a background wouldn't be as strong of a support facilitator, which was really what I-- so then Jackie's like, well, let's talk about this. Let's see what we can do. And so through-- and I'll let Jackie elaborate-- through conversations, Jackie worked really closely with us and then talked with WINTAC about bringing-- because we also wanted-- we wanted the employer IDVR site with WINTAC and we wanted the educator with NTACT:C . We wanted both of those in the room. Jackie, I'll let you elaborate.

JACKIE HYATT: Well, I think one thing is you look-- as you shared who was a part of the team. I think what you did was you build an already collaborative relationships that you have. So Idaho has had a strong relationship with all of the groups that Alison mentioned. And then, bringing in the administrators, your field service managers, and your field staff I think was a real-- it just built out the conversation.

So you were getting those conversations from what was going on out in the yield. And administrative support and that was really helpful to you to have that voice in there.

BRENDA SIMMONS: Yeah, that's what I was thinking, Jackie, when Alison was talking I was reminding-- I was going back to the room, Alison, that we were all in. And I think one of the points that you made with the fact that you didn't feel like you had to lead that meeting necessarily, it allowed you to be one of the partners at the table, right?

And so it was really a great opportunity for you-- for us-- that's really the title of this whole series is Strategic Planning: A Collaborative Approach. And I think you all exhibited that so well. You can't just do it by yourselves. I mean, you have to take a look internally. You had to do that dadgum forecasting. Alison, you have to look at all of that.

But where it really comes into play is that partnership piece where every partner feels like they have a really strong voice at the table and looking at how do we want to move forward.

So I thought you all exhibited that great. So thanks for taking a minute, Alison and Jackie, to really talk about that. Because I think building that team and building that foundation, you're not going to go where you need to go if you don't do that step, right? Because I think that's a big piece of it.

After you kind of, Alison, made that decision, OK, we want to take this comprehensive approach to evaluating our Pre-ETS services and our programs. We want to do the strategic planning. What were some of the next steps in this process?

ALISON LOWENTHAL: So the next step was really me meeting with, Brenda, you and Jackie to kind of go over and develop, what do we feel like would benefit the individuals who are participating in this process? Making sure that, one, they have the background information to help make some of the decisions of where we were going. But then, two, what would help lead us to an actionable strategic plan? Because the big thing is I want to make sure that there's action items and there's things to move forward.

So we work together. We even worked together to develop the planning guide of next steps and things that needed to be done for that. And then, determined that we felt we needed probably a two day meeting. We really wanted it to be face to face. I will tell you this was 2019 when we did this. And so it was when you could more easily do face-to-face meetings. But we were able to do a nice big face-to-face meeting.

The other thing that I felt was really important, and fortunately, because as Jackie said, we have a very strong interagency council here in Idaho. I'm aware all of the other different plans that we had. Because I didn't want to create just another plan that had nothing to do with the other state plans that we had done.

So I really wanted to pull in our NTACT statewide plan, which fortunately, again, I'm a co-team leader on that. But also we created a transition leadership team plan. We have our interagency

agreement with the State Department of Education and our Commission for Blind and Visual Impairments.

And then, really looking at our other practices. Because to me, I don't want to create a plan that argues with something that's already going on or doesn't complement what we're looking at as a whole state of trying to move forward with transition planning. So really, but understanding that a lot of the people that were in that room aren't familiar or are aware of these other plans and documents. So that was wanting to make sure they had that information as well.

BRENDA SIMMONS: Yeah, I don't know about you, Jackie, but that was probably-- in addition to assembling a really great team, that was one of the things that really impressed me, Allison, in our initial conversations when we were even just thinking about this. And you made that really clear to Jackie and I.

It's like, hey guys, this is really important to me that we're not creating one more thing that we have to try to make sure that we're doing. Or that it just doesn't become a check off. It needs to really incorporate the vision of all of our other plans. We need to align all of the plans that we've already got out there and just bring these together. And how can those plans inform how we're going to move forward?

And so I was really impressed by that piece, Jackie. I don't know-- anything else you want to mention about that?

JACKIE HYATT: No, I think what you said is perfect. The whole thing about bringing those plans together and just learning from what information they provided I think was really a big piece that Alison brought into that conversation.

BRENDA SIMMONS: Yeah, and just having an opportunity to review those, right, Alison? I mean, sometimes-- they kind of were things that you all had worked really hard on and didn't necessarily look at every day, right?

So it was kind of good for everybody as they were sitting around the table to go, oh yeah, this is-- this was a really important piece. And yeah, we are still moving in the same direction. And so I think that was really good.

JACKIE HYATT: I think one thing I would add is looking back to bringing in the local field staff. People that are really working with students into that voice. Because some of the state plans probably have a lot of people engaged from that level really taking a broader look at that from their perspective. And they brought a lot to that conversation, too.

BRENDA SIMMONS: You know, Jackie, that is a really good point. Because sometimes as directors of transition services across the state, we think we've communicated at the state level with our other state education partners and things like that, and we probably have. And we feel like we've communicated with our field staff, right? And we feel like they should also be aware of all these things that we're doing.

But sometimes, when we have an opportunity to really listen to them and bring them in and they have that feedback, Jackie, thank you for mentioning that. Because at that local level, we were learning some stuff, weren't we, Alison? I mean, it was really good to know not only what the vision was at the state level, but actually, how it's being implemented at the local level. So that was so important in the strategic planning. So yeah, Jackie, thank you for mentioning that.

All right, so woo hoo. We're finally to the kickoff of this two day strategic planning event that Alison has planned. Do you want to tell us a little bit more, Alison and Jackie, about-- well, I guess, first of all, Alison, what you hope to actually achieve from this two day event. And then, Jackie, I'm going to let you share a little bit more about the logistics and we kind of had a big group and then broke out into some smaller groups. And if you don't mind sharing a little bit about what that looked like.

ALISON LOWENTHAL: Yeah, so with the development of the agenda, so one of the things I really wanted was the way-- because in Idaho, I was the transition person for Idaho. I mean, it was me.

And so I wanted WINTAC and NTACT come in and share with the staff why I do-- why we've made decisions that we have. And so I really wanted them to hear from someone other than me.

And so that was why we really wanted to start off just this understanding from the WINTAC and NTACT common understanding of what we were looking at and how we were going to move forward and why we needed to do what we needed to do. So it was really giving people the why. Why are we here? Why do these things-- are these things important?

But again, hearing it from someone that wasn't me. I will say I did share the common practices. That was the one piece that I did. And that was going back to the previous slide of sharing the state transition plan-- sharing our transition leadership plan. But letting people know, here are some of the things that we've already done. And it's important that this information doesn't get lost in what we're doing in the next two days.

For the data share, I did assign the data share to some of my transition leadership team members to have them walk through and share some of the data. Because it's data that they've collected. They're the ones that bring the students in. They are the ones that are getting the students into our programs. And so I did have them share some of that data. And I know I addressed the data before.

After doing that-- so understanding the why-- understanding what was already in place and moving forward. And then, viewing and looking at our data to see where areas of-- understanding areas of need. We did as SWOT analysis. For those of you who don't know that acronym, that's strengths, weaknesses, opportunities, and threats.

And so we really wanted to look at a state wide-- based on those common practices, based on that data share, what are some of our strengths? And really lifting those out. And that was a great activity that WINTAC did where people were throwing stuff all over the walls, giving their own ideas. So it wasn't like we were having some boring group sit down at the table and people were raising their hands.

I mean, people were jotting things down and putting things together and really trying to figure out what were our strengths. And how did people from those different-- the different representation see what those strengths were. And so then we did the same thing for, obviously, weaknesses and went through and then grouped those trying to figure out where we were at with some of our weaknesses.

The next thing was really looking at, OK, what are some opportunities that we have that we may not have already looked at? And so that was-- I felt like that was great because we were able to have ideas generated from people who might not have normally generated those ideas. And most specifically, the field staff. Because the field staff, they were able to understand and know their communities. Because as I said, we had regional representation. They know their communities and they know what opportunities might be out there and might be available that we hadn't really looked at.

And then, last but not least, threats. What were things that could threaten moving forward? We all know that no plan just goes into effect and works perfectly. But trying to say what could those possible threats be so we can maybe try to be more proactive to figure out ways that we can combat those before.

BRENDA SIMMONS: Yeah, thank you. And so I think, Jackie, honestly, I just have to have you talk about this a little bit. Because for many of you all that no Jackie, there is nobody that can coordinate a sticky note while better than Jackie. Jackie knows how to do that. And there is so much merit, Alison, to what you were saying about it being not just sit and listen or get information. But for everybody at the table to feel very much a part of this. For it to feel very interactive. So Jackie, can you tell us a little bit more about the logistics of how you set that up, really?

JACKIE HYATT: So and Alison did a great job walking through how she set it up and how she incorporated other voices into that set up so they have the common understanding. But we did a combination of having the full group share and have conversations and ask questions of each

other as well as breaking into smaller groups so that everybody did have a chance to really be heard.

And we mixed it up so that people that don't typically get to talk with each other, like Alison mentioned the field staff talking with the state Parent Information Center director. Just different people having those conversations. And then, bringing it back in. I have to say the one thing that I've really missed over the last couple of years is putting things on the wall.

We try to really do a lot of that interaction, not have a sit and get kind of thing. So and Alison is great at that, too. And she's a great partner in thinking through that. And Brenda, it was great working with you to bring in that because it does take-- I mean, we were tired at the end of the two days. All of us, I think.

And people stayed engaged and really worked and had those tough conversations. I think the focus on data was really helpful. Because data kind of takes that personal out of it a little bit and you can have some of those questioning kinds of conversations and identify all of those strengths as well as your gaps.

ALISON LOWENTHAL: And talking about the engagement, Jackie, I mean, I've had two of my VR counselors tell me that it was the best training that they've ever been in for VR. And that they felt that it was the most beneficial. And these were counselors who normally are more general caseload counselors. They're not counselors who are school to work case loads. And so they found it so beneficial.

And so I probably should have shared that with you guys before.

BRENDA SIMMONS: Well, that is great to know. But I'll tell you I think a couple of things. I just wanted to hit on, Jackie, what you and Alison talked a little bit about. And it was, again, assembling that team.

One of the things you just mentioned, Alison, is that you didn't just invite the best of the best of your transition counselors, right? It was some of those counselors that are general caseload counselors and maybe you just have one or two high schools.

Because you need that-- you need their perspective. You need all of that as you're really looking at what worked, what didn't work, did you get that message? What did you hear? And so, Alison, when you're doing your trainings and you're doing-- you're training your staff, it was a great opportunity for you to hear back what they really heard from you.

And then, I think that was the piece where Jackie, especially on the education side, and then me, a little bit on that VR side, able to reinforce what you were telling them. And able to kind of reinforce how important some of these things are. Some of the data collection, the tracking, the reporting, the documentation that is driving them crazy.

But this is why it's so important that you need to do this. And why you need to spend more than two seconds filling out something on how you're tracking some of that data. So I hope we were able to support you and the training that you'd already been providing in your state, Alison.

And then, kind of just reinforcing. It was so good for Jackie and I to hear what the counselors were hearing.

JACKIE HYATT: Yeah, we learned so much from them. I think the other thing that's important to remember is throughout those two days and the conversation was the focus really was on student outcomes. So people really had that at the heart of the conversation.

Just coming back to that Parent Center kept bringing us back to that, too, as well. That was really the focus. And I think that helped keep people engaged as well.

ALISON LOWENTHAL: Kind of going on to day two just a little bit. As we said, we started the day just by recapping what we've done the previous day. We really tried to do some statewide

mapping of resources and opportunities for students as well. But then, as I mentioned before, it was really important to me with-- that we had an actionable plan that was in place.

And so the tool that was created really focuses on, what are actions? What are something that you really-- you can know and you can measure to know if that has occurred? And then, whose rules and responsibilities are them? And identifying and putting people's names to them. And so helping them to understand, this is a part of who you are. And even though this might be a VR plan, you have a role or you have a responsibility as a part of the planning process.

And so that was, obviously, what we spent a majority of our time on day two. But then, it was really, OK, and what are our next steps from moving forward? This isn't just a fun two days with Brenda and Jackie. But this is, OK, now the real work is going to happen. And so moving forward from that.

BRENDA SIMMONS: Yeah, thank you. Thank you. Jackie, anything else to add about day two? Thanks for reminding me.

JACKIE HYATT: I don't. But Alison, that was great to remind us of that. I think the roles and responsibilities and weaving it in. I think it informed the other agencies as well, too. So whoever was at the table, including education, your Parent Center, they all had actions to take away, too.

BRENDA SIMMONS: Yeah, and that was a good example too, Alison, where the first day you're looking at all the data that you have. And you're like, OK, and what does this mean? And you're sharing that data and making sure we're on the same page. And looking at all of that.

Well then, what the heck are you going to do with it, right? So that was kind of the day two. Let's talk about putting this into action. Now that we know some of this, what are we going to do with it? So yeah, really an important piece. I don't think you could have done it in a day. I really think you needed both of those days.

So Alison, can you--

ALISON LOWENTHAL: So that went back to the previous slide?

BRENDA SIMMONS: Yeah. Yeah, I just went backward. Sorry about that. So when we look at some of those lessons learned, Alison, can you share anything that you learned along the way? And maybe some things that other states might want to think about as they start to begin looking at maybe a strategic planning approach to their Pre-ETS services.

ALISON LOWENTHAL: So yeah, so one of the biggest things that we found pretty quickly, and it was actually kind of shocking, was the holes in our data, which I mean, I know everyone has holes. But we were like, wow, we do not have the data we need to make some of the decisions that we need to do.

One of the bigger ones-- and this was actually really good because it's changing things in the way our data looks and our data dashboards-- is that our councilors weren't recording actual Pre-ETS services that they were providing. They had counseling and guidance listed on their students IPEs where they were providing counseling and guidance. But they weren't putting in actual service because they weren't fee for services.

So when it came down to a lot of our services that our counselors were doing, we weren't capturing that data in our AWARE system because there wasn't a fee related to it, only the counselor's time to provide that service.

We also realized that we really need to have a system of linking actual services to our I time so the counselor's time for when they're providing those services and looking at that and utilizing that data. So that was a big hole.

The other huge hole we realized is for potentially eligible students we weren't requiring counselors to put in the school or the district where the student was attending school. So we would have all-- a majority of our potentially eligible students, we couldn't determine which LEA they came from. And so we were missing that.

We also realized we were missing a number of schools, even, that weren't in our AWARE system. And so if a counselor got in and a school wasn't there, they might not be able to identify that school. Why that is so important is we are really looking at and using our data now to target those LEAs and schools where we are not seeing students receiving services.

But when we initially looked at that data, we couldn't pinpoint that because we didn't have enough of it to really be able to move forward and-- moving forward. And then, the last thing is, obviously, sharing of data. I know Brigid and Sandy talked about it in the beginning.

It's how do you do this better? How do we work better with our educational partners to figure this out and know that our data makes sense with each other? And so that was a huge thing that came out of that and a big bump in the road.

The other bump in the road we found is we had certain student groups that we were just missing. We had very few students in rural communities receiving services. We had very few students in juvenile corrections receiving services. Our charter schools, we weren't seeing numbers like we showed in our charter schools. And then, students in the foster care system.

So we were able to pull out at least some of this information from our data that we knew that these had to be targeted-- groups that we specifically targeted that instruction.

BRENDA SIMMONS: Wow, so your data then-- having an opportunity to really look at that helped you identify those gaps and really see those holes. Yeah, I think that's really good to know. We talked a lot in the first webinar-- just kind of as another little plug for that first webinar-- we did talk a lot about the data piece and how you can collect some of that and how you can kind of go through the strategies for really getting as much as you can around collecting the data that you need.

And we know, Alison, we're still young in this process, right? Of data and collecting this. And we know we're not perfect in states in terms of what we're necessarily tracking and reporting on. But

we're getting there. We're getting there. And we're getting a little bit more information as we're learning more every step of the way.

So our data really can now tell us some good information. So I think that's great. One of the things I think Alison, as a follow-up, you had talked just a little bit about-- you mentioned about juvenile justice and corrections and that those were some students you were missing.

And when we talked a few weeks ago, you happened to mention that what happened with COVID changed a little bit in terms of working with this population. Can you talk about that just for a minute?

ALISON LOWENTHAL: Yeah, so we were able to really target our juvenile correction students with an online curriculum to provide pre-employment transition services to them. And it has, so far, I mean, we started out here in the Treasure Valley, which is kind of more of the Boise area in Idaho of getting a group of corrections students to participate in this curriculum, which is still kind of led by a teacher, but mostly online.

And then, really building that out statewide to our other correction departments. And so that has been something that, this year, even with COVID. So we actually have seen-- during COVID, we've seen more students in juvenile corrections receiving Pre-ETS than we had prior to COVID.

BRENDA SIMMONS: Yay. That's great. That is great. OK, so I am going to move along to the next one. A little bit about things that were a little bit around bumps in the road, Allison, that we just talked about. But now, can you share a little bit more with us about what really worked?

ALISON LOWENTHAL: Yeah, and this one I can go over pretty quickly. I mean, as I mentioned before, having WINTAC and NTACT facilitate was hugely important. Their background knowledge, as Brenda said, Jackie's amazing with keeping things really engaged and interactive. That was huge.

Having the diversity in the team. So having different people's perspectives. Helping the members of the team understand what some of the data is that we look at the central office but that might not always trickle down to the field. Doing that strengths, weaknesses, opportunities, and threats analysis, that SWOT analysis.

Mapping our resources to really understand we might have more information out there than we thought or more availability in resources. Also we put it on the transition leadership team to follow-up on that plan. So by that, the transition leadership team would meet every so often. And the first thing that would happen was we would pull that plan. We would pull up the strategic planning as a part of that meeting.

But I think, for me, what worked the best was because of that strategic plan, Idaho just made the determination that we needed to add area transition counselors. So not just having the statewide transition coordinator, but adding area counselors. And so since then, I have been able to have three new area transition counselors. We've reconfigured some of our FTE so that I have three people now whose sole focus is to focus on transition both for pre-employment and youth transition services.

And so we have someone in the Southeast and South Central Idaho, Southwest Idaho, and Northern Idaho. And it has been unbelievable. And the relationship and their understanding because they all came from the field. So they were field counselors and they had worked as school to work counselors bringing in their wealth of knowledge. And their support has really helped.

And we brought them during COVID. And we still are seeing an increased collaboration with our school districts. And as I said, an increase in students in some of those areas we identified. I mean, I'm pleased to say we have a tiny little-- it's not even considered rural. It's considered more frontier it's so small. And we have four students doing a paid work experience in that small little community this summer.

And so there's just-- it gives me chills. So it's been really wonderful being able to add those individuals.

BRENDA SIMMONS: Alison, yeah, that's great. So you're really seeing an impact, as Sandy had talked about earlier, on your students. And an impact on your program, right? I mean, that's awesome to go from one just one of you. And now you've got-- there's three. So that that's amazing. That's great.

One thing I wanted to ask you about. I think you had mentioned to me, didn't you all go through a recent RSA Rehab Services Administration Monitoring review as well? Did you find that this helped at all with any part of that? I don't know or not.

ALISON LOWENTHAL: So we're still in the middle of our monitoring. We end in a couple of weeks. But yes, significantly. I turned in the strategic plan as a part of my resources for the monitoring visit as one of our resources of what we gave them. We have had our Pre-ETS conversation already.

And I mean, we don't have the results. But from my perspective, it went really well and they seem to be very happy with the way that Idaho was addressing Pre-ETS. And so yeah, I have it in writing. I can't really say. But the I left the meeting happy. And so that's pretty telling, I think.

BRENDA SIMMONS: Absolutely. That's very positive. Thank you. Thank you so much, Alison. Jackie, anything any last little-- anything else you wanted to share before I turn it back over to Sandy and Brigid?

JACKIE HYATT: I think it's just been great to hear Alison revisit the work and to now hear how it's been used. And just realizing that strategic planning really did help to impact the practice. And then, and inform what was going forward. So that was really great, Alison, to hear how you've taken that forward.

BRENDA SIMMONS: Absolutely. I thought so too, Jackie. It was so good to hear what's happened as a result of that. That it wasn't just-- it didn't feel just meaningful at the time to go through it. But that you really are seeing some impact across the state. So thank you, Alison, so much for sharing this information with us.

And I'm sure as viewers watch this, if they reach out, they are going to be wanting to know how to get a hold of you. So we will pass them along for sure. So with that, I am going to now turn it back over to Brigid, I think. Bridget or Sandy, one of you all are going to take it away.

SANDRA MILLER: Well, it will be me, it's Sandy. But thank you so much. Thank you so much. I mean, that was such a great discussion hearing about Idaho. And really, that they highlight the partnerships especially with education, which segue ways really well into this next section and gives a examples of the kinds of outcomes that can result from successful collaboration.

So these are some areas you may want to pay close attention to in order to see what's happening with the students that you're working with. And Brenda, if you want to go on to the next slide, please feel free. Thanks.

So do you have more students participating and work-based learning experiences prior to exiting from high school? And how about your graduation rates? Are there more students graduating? Are there fewer dropouts? And is there an increase in the number of students who are achieving their identified post-secondary goals?

And are more students participating in post-secondary training education? Are they able to attend-- I'm sorry, attain credentials, measurable skills gains. And then, of course, we want to see that they're getting jobs where they have opportunities to advance.

And then, next, after post-secondary education, are you seeing an increased number of students achieving competitive integrated employment? That's in the line-- that's in line with their expressed career field. Are there more VR participants, and are they achieving quality employment

outcomes? And are VR and education engaging more with their business and community partners so that job seekers are more prepared to enter the workforce?

Of course, this isn't an all inclusive list of successful outcomes. I think you heard a number of them from Alison. But certainly, these are some great ways to identify that the work you're doing with education is really on track. And now, Brigid is going to talk a little bit about how we can move this work forward.

BRIGID GRIFFIN: Right, well, wow covered a lot of material in this combined set of webinars. We walked through the strategic planning guide and got to hear about Idaho's experience. Thanks again to Brenda and Jackie and Alison for sharing that real life experience and the hard work of strategic planning. But fruitful work, it sounds like. I mean, it just sounds great. I enjoyed that presentation so much.

So what's next? If you're just starting out, I think that Alison walked us through a lot of the pieces of what's next. Think about who will be on your team. Have some representation from your state education agency, your Parent Training Center, and any other partners that you've identified that might be able to enhance the process.

Identify who is responsible for various activities. And Alison talked as well about timelines and getting things done. If you decide to use the strategic planning tool, take the temperature of where you are currently, what strategies you have in place, and what information you have at hand before moving forward.

And finally, on this last slide, you can move forward, Brenda. Just a few more points to consider. Incorporate strategic planning into your existing work in alignment with your agency vision. I think that Alison also pointed that out to us. Meet regularly and have target dates for completion breaking bigger tasks down into more manageable tasks. Communicate with all parties throughout the process and ensure that your agency staff are informed and aware of what's happening.

Remember, this is a guide or a road map to use as it fits your agency to help you think about your program and how you plan to use it for continuous improvement. Alison talked us through how you have to customize it for each state. So just use this as a guide and remember you can always reach out to us at NTACT:C or the VRTAC QM for any assistance along the way. Next slide please, Brenda.

So we are at the end, folks. Look at that. We're at the resources page. Lots of resources on here. You know that the guide is attached to this webinar. And you can reference this page for resources. I'll turn it over to Brenda now to bring the webinar to an end.

BRENDA SIMMONS: Thanks so much, Brigid. And thank you, Sandy and Alison and Jackie for sharing all of that great information. And thank each of you for joining us today. We hope that you find this information helpful as you consider implementing a strategic planning approach in evaluating and moving forward with the provision of pre-employment transition services.

Don't forget to go back and view part one of this webinar series if you haven't done it yet. Part one really does include a lot of great information outlining the strategic planning guide itself, which we think that many states will really find helpful.

Finally, I want to do another quick reminder that viewers that might need a CRC certificate of completion for one hour of continuing education will be issued for each session of the two part training series as long as you did complete that evaluation and quiz at the end of each webinar. OK, so again, thanks so much to the presenters and have a great day.