Summary Evaluation Report:

Oregon's Intensive Technical Assistance Plan

June 2015 through September 2020

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Overview

Oregon (OR) began receiving intensive technical assistance from the National Technical Assistance Center on Transition (NTACT) in 2016. The OR team consisted of individuals from Oregon Department of Education (ODE), Oregon's Vocational Rehabilitation (VR), and Office of Development Disability Services (ODDS). Collaboratively, the OR team identified a shared goal and six sub-goals. Through the course of the intensive technical assistance (ITA), some sub-goals were achieved and expanded. **Oregon's Share Goal was *to improve transition outcomes for youth with disabilities by creating an equitable, sustainable, simplified system, aligned across agencies that reduces redundancy*.** The six sub-goals were:

Goal 1: Develop an OR universal release of information (ROI) combining ROI requirements from ODE, ODDS, & VR with review by legal counsel for sufficiency across agencies and then implement/ field test. This goal was completed.

Goal 2.1: ODE, VR, ODD will develop and implement 36 cross agency professional development trainings (focused on employment opportunities for staff working in, VR, Parent Training Information (PTI), Developmental Disabilities, tribal VR, and education) to facilitate universal information sharing (ISP, IPE, IEP, SOP), collaborative resource delivery, and promote shared outcome of employment for all transition age student with disabilities. This the Regional Employment Collaboration (REC) trainings. This goal was completed, and expanded to 2.2.

Goal 2.2 ODE including CTE, VR, ODD will develop and implement round 2 of cross agency professional development trainings (content focus will be determined by evaluations from round 1 REC and include the benefits and opportunities for SWD to participate in CTE, Job Accommodation Network (JAN). This goal was continued.

Goal 3: Develop and provide professional development trainings adapted for families and foster and group home family support about the Individual Service Plan (ISP),individual Education Plan (IEP), Individual plan for employment (IPE) and Summary of Performance (SOP), and Oregon universal release of Information (ROI) as well as on eligibility requirements and needs of each agency in order to provide coordinated services to youth. This goal was continued.

Goal 4.1: Increase summer work experiences for 100 students with disabilities (SWD) by blending funds from VR, DD, and Education. This goal was completed, and expanded to 4.2.

Goal 4.2: Sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments. This goal was continued.

Goal 5: Develop a data collection method to capture Pre-Employment Transition Services (Pre-ETS) activities as required by Workforce Innovation Opportunity Act (WIOA) occurring in high schools and transition programs without a YTP contract. This goal was completed.

Goal 6: Cross agency team will develop an educational version of the discovery tool to be used by educators to document discovery-like activities completed during the student's educational programming. This goal was continued.

Out of the original six goals, two were continued, four were completed; two of the completed goals were expanded into new goals that the state team is continuing to work on separately from NTACT.

This report summarizes the OR Team's work on their intensive technical assistance plan with the NTACT through December 2020. As relevant, an executive summary for each completed goal is provided. Full reports of results for each goal follow the executive summary. Progress notes are provided for goals that are continuing. Appendices contain respondents' comments to open-ended questions as relevant to each goal.

Oregon's state goal for the Intensive Technical Assistance with NTACT was to *improve transition outcomes for youth with disabilities by creating an equitable, sustainable, simplified system, aligned across agencies that reduces redundancy.*

Goal 1: Executive Summary

Goal 1: Develop an Oregon universal release of information (ROI) combining ROI requirements from ODE, ODDS, & VR with review by legal counsel for sufficiency across agencies and then implement/ field test. This goal was completed.

The intent for this goal was to streamline the time it takes for a client to move through the key procedural milestones (e.g., from application to services). Having potential clients sign multiple releases of information was viewed as duplicative and inefficient, resulting in delay of services, especially when multiple agencies were involved in service delivery.

Oregon's Team hypothesized that duplicated paperwork such as requiring clients/potential clients to sign a separate release of information (ROI) form for each agency the clients/potential clients were seeking services from contributed to slowing access to services, and ultimately to the intended outcome. To remedy this challenge, the Team proposed to develop and implement a single ROI form that all three agencies would use. The client/potential client would sign a single ROI form containing the information requested from each agency and that single form would be sent to the other relevant agencies, thereby eliminating the need for collaborating agencies to obtain separate release of information forms, thus reducing the amount of time spent waiting to receive information from other agencies.

The Team's theory of change was that if the three agencies (VR, ODDS, and Education) used the same ROI, then there would be less duplication of effort and redundancy across agencies, less burden on potential clients, and less time spent waiting for an initial signature or for a signed ROI form to be shared between agencies. The result would be faster movement from referral to services to closure for the client, as evidenced by the fewer number of days between each key milestone.

As the OR Team worked on this goal, Oregon legislators passed SB 397 in 2017, which "directed certain state entities to create and use a common client confidentiality release form" (DHS Action Request Transmittal, Dec 20, 2018). Members of the OR Team from ODDS, already working on the single ROI, led development of what became known as Form 3010.

The ROI was evaluated through two methods. First, a paper/pencil or online survey following training sessions was used to measure effectiveness of the training sessions. Second, a time interval calculation to determine whether the amount of time taken to reach key procedural milestones within the system was different after implementing the ROI. It is important to recognize many factors contribute to time interval between key procedural milestones (e.g., application to plan).

Survey. To evaluate the effectiveness of the trainings for the ROI, a paper survey was distributed following each in-person training in fall 2019, and an on-line survey was distributed in June 2020. Survey questions asked about ease of use, helpfulness in collecting information, reduction of burden on families/clients, increased interagency collaboration, and consistency of use. In all, there were 393 respondents to the surveys. Since the surveys were anonymous, it is possible there may be duplication in the respondents. Of the 393 respondents, 26% (n = 102) of these reported they had heard about, had been trained on, and had used the statewide ROI; n = 88 respondents gave their opinion about the overall utility of the form.

Results. Responses from the surveys showed most respondents strongly agreed or agreed that the ROI (a) made it **easier to gather information** from multiple agencies; (b) **helped** service providers get enough information from multiple people to develop a student/client's plan; (c) **reduced the burden** on families and clients by not requiring them to complete multiple release forms; (d) **increased interagency collaboration**; and (e) and was **consistently used** in their agency or school.

Time Interval Calculation. The purpose of this time calculation was to provide further insight into the effectiveness of the Statewide Release of Information, Form 3010. The time interval was calculated for each key procedural milestone to determine whether the number of days changed between each milestone for the three time periods – pre, pilot, and post.

Results. The median number of days taken to reach each procedural milestone decreased from pre-pilot to post-pilot.

Goal 2: Executive Summary

Goal 2.1: ODE, VR, ODD will develop and implement 36 cross agency professional development trainings (focused on employment opportunities for staff working in, VR, Parent Training Information (PTI), Developmental Disabilities, tribal VR, and education) to facilitate universal information sharing (ISP, IPE, IEP, SOP), collaborative resource delivery, and promote shared outcome of employment for all transition age student with disabilities. This the Regional Employment Collaboration (REC) trainings. This goal was completed.

Goal 2.2 ODE including CTE, VR, ODD will develop and implement round 2 of cross agency professional development trainings (content focus will be determined by evaluations from round 1 REC and include the benefits and opportunities for SWD to participate in CTE, Job Accommodation Network (JAN). This goal was continued.

Regional Employment Collaboration trainings were conducted between May 2018 and December 2018 by representatives from the three agencies in the region hosting the training. The purpose of the trainings was to help attendees gain a solid understanding of each member of a student's employment team and to identify points of collaboration between agencies to support a student from school to employment. Training was developed and vetted in partnership with the regional staff from the three agencies. The regional staff then conducted the trainings in their regions, using scripted training materials to provide consistency to the training and the information that was provided.

Attendees. Evaluations were received from trainings held in Baker, Benton, Clackamas, Coos, Hood River, Jackson, Klamath, Lane, Lincoln, Linn County, Marion-Polk, Multnomah, NW Regional ESD, Ontario, Redmond ESD, and Yamhill. Sign-in sheets were not available for all training locations; therefore, an overall response rate cannot be calculated. Of the 10 sites for which sign-in sheets were available, the median response rate was 66% (n = 19) evaluations per site) and response rates ranged from 49% to (n = 27) to 100% (n = 20) for individual sites.

Respondent attendees represented all three agencies with most respondents being from ODDS (43%), followed by employment providers (21%), school/district staff (13%), and VR staff (11%); 13% did not identify with an agency or were regional support staff such as Transition Network Facilitators, or Youth Transition Program Technical Assistance Providers. The evaluation addressed five areas: (a) achieved outcomes, (b) usefulness of the content to them, (c) relevancy of the content to them, (d) perceived knowledge before and after the training, and (e) satisfaction, and included an open-ended prompt for *other comments.* Evaluations were received from 16 training sites, and 379 attendees provided an evaluation.

Achieved Outcomes. Taken together, 85% to 94% of the respondents to the evaluation strongly agreed or agreed that each intended outcome was achieved. The average ratings for the nine outcomes ranged from 3.41 to 3.17 on a 4-point scale (4= strongly agreed, and 1=strongly disagreed).

Usefulness and Relevancy of Information. Overall, respondents rated the information useful and relevant. Average ratings for usefulness ranged from 2.93 to 3.35 on a 4-point scale (4=extremely useful, and 1=not useful). Average ratings related to relevancy ranged from 3.01 to 3.41 on a 4-point scale (4=extremely relevant, and 1= not relevant).

Perceived Change in Knowledge Before and After the Training. Across all nine questions, respondents indicated their perceived knowledge was higher at post-assessment than it was at pre-assessment. Average ratings on questions at pre-assessment ranged from 2.02 to 3.29, and average rating at post-assessment ranged from 2.77 to 3.56 on a 4-point scale (4= high, and 1=low). The average change in perceived knowledge was approximately one-half point (.58).

Satisfaction. Overall, 75% to 87% respondents agreed or strongly agreed that they were satisfied with the training. Average rating was from 3.42 to 4.68 on a 4-point scale (4=strongly agreed, and 1=strongly disagreed).

Open Ended Responses. Respondents gave 74 comments to the prompt, "*provide any other comments you think are important for the event planners and presenters to know*" and were generally positive, constructive, and consistent with other data in the evaluation. The comments clustered around five themes: (a) appreciation, (b) expressions of benefit, (c) not helpful/not beneficial, (d) considerations for future trainings, and (e) miscellaneous.

Summary. Results of the evaluations completed by the 379 respondents from 16 trainings indicate that the intended outcomes were met, knowledge was gained, and respondents were generally satisfied with the training. In addition, respondents provided suggestions for future trainings.

Goal 4.2: Executive Summary – 2018

Goal 4.1: Increase summer work experiences for 100 students with disabilities (SWD) by blending funds from VR, DD, and Education. This goal was completed.

Goal 4.2: Sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments. This goal was continued.

Summer Work Experiences were provided in 2017, 2018, and 2019. The program was suspended in 2020 due to the COVID-19 pandemic. The goal of serving 100 students with disabilities in a summer work experience was achieved in 2017, however, evaluation data were not collected at that time. After initially meeting the goal of serving 100 students in 2017, this goal was revised to: "sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments". The focus of the work shifted to the summer work program and away from blending funds across the three agencies, or evaluating policy and procedures to guide future investment. Executive Summaries are provided for 2018 and 2019.

This goal was addressed through funding provided by Vocational Rehabilitation for a Request for Application #4448 to support Summer Work Programs across Oregon. Youth participant data were collected to help the state develop policies and track outcomes, provide technical assistance to help providers think about sustainability and develop a local plan and MOU to commit sources of funding for sustainability. During summer 2018, Oregon's Vocational Rehabilitation supported a summer work program (RFA 4448) designed to provide youth with barriers to employment an opportunity to gain work experience. The initial goal, to serve 100 students, was exceeded. Direct measures of policies, outcomes, and technical assistance to establish sustainability have not been conducted, to date.

Participants. RFA 4448 provided slots for 305 youth to participate in summer work programs and 262 slots were filled, for an 86% participation rate. Of these, 162 participants provided a pre-and post-measure resulting in a 62% response rate. Pre- and post-measures were collected from participants at 13 local sites. Using a pre/post-measure of knowledge and opinions, participants were asked about (a) their work goals, (b) work-based knowledge, (c) summer learning goals, and given the opportunity to provide additional information to program planners.

Work Goals. Participants' work goals at pre- and post-summer work experience were grouped according to how specific their goal was (a) non-work related (e.g., to help my parents; keep busy; go to school), (b) generic work goal (e.g., to gain experience, to work), or (c) specific work goal that included a named location or type of work (e.g., work at Taco Bell; be a vet tech). Most goal statements were generic at both pre-measure (n= 115) and post-measure (n=75).

Work-based knowledge. Participants indicated their level of agreement with statements related to work-based knowledge: (a) being prepared for future employment, (b) transporting to and from work, (c) asking for help at work, and (d) following a work schedule. At pre-measure, average agreement for the four questions ranged from 3.27 to 3.50 on a 4-point scale, with 4 being strongly agreed, and 1 being strongly disagreed. At post-measure, average agreement for the four questions ranged from 3.36 to 3.66 on a 4-point scale, with 4 being strongly agreed, and 1 being strongly disagreed. There was a positive difference in participants' level of agreement between the pre- and post-measures.

Participants were also asked to answer three questions related to (a) writing a resume, (b) completing a job application, and (c) requesting accommodations. For all three questions, participants answered more questions correctly on the post-measure than they did on the pre-measure, indicating a positive gain in knowledge between measures.

Learning Goals for Summer. Participants were asked to identify what they wanted to learn from the summer work experience in seven areas, (a) better communication skills with supervisor, (b) better communication with co-workers, (c) personal management, (d) leadership skills, (e) teamwork, (f) self-confidence on the job, and/or (g) learning new job skills. Without exception, more participants expressed interest in each goal area at post-measure than at pre-measure.

Additional information. Participants could provide additional information to program staff at pre- and post-measures. At both times, comments were positive. At pre-measure, responses were grouped in two topics – nervousness, and miscellaneous. At post-measure, responses were grouped by four topics – continued working, advice to others (e.g., If I had the chance to do this again, I would.), miscellaneous (e.g., Money is easy to make), and things learned (e.g., Doing this program was amazing).

Summary. These data do not measure the intent of Goal 4: to increase summer work experiences by blending and braiding funds from multiple agencies. Different data are needed to determine the extent to which this goal has been met. Nevertheless, what is clear from these data is the interest in the Summer Work Program and benefit to youth.

Goal 4.2: Executive Summary: 2019

Background. Goal 4 of Oregon's Intensive Technical Assistance Plan with the National Technical Assistance Center on Transition is "to increase summer work experiences for 100 students with disabilities by blending funds from Oregon Department of Education, Office of Developmental Disability Services, and Vocational Rehabilitation." After initially meeting the goal of serving 100 students, this goal was revised in 2017 to: "sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments".

This goal was addressed through funds provided by VR for a Request for Application (RFA) #4448, revised to #4708, to support Summer Work Programs across Oregon. Student participant data were collected to help the state develop policies and track outcomes, provide technical assistance to help providers think about sustainability, and develop a local plan and MOU to commit funding sources for sustainability. During summer 2019, Oregon's VR supported a summer work program (RFA 4708) designed to provide students with barriers to employment an opportunity to gain work experience. Relative to Goal 4, direct measures of policies, outcomes, and technical assistance to establish sustainability have not been conducted at the time the 2019 report was written. However, the program coordinator for the RFA 4708 emphasized the need for summer work programs to actively plan for sustainability beyond VR funding.

Participants. RFA 4708 provided slots for 440 students to participate in summer work programs and 400 slots were filled, for a 91% participation rate. Of these, 175 participants provided a pre-and post-measure resulting in a 44% response rate. Pre- and post-measures were collected from participants at 18 local programs. Using a pre/post-measure of knowledge and opinions, participants were asked about (a) their work goals, (b) work-based knowledge, (c) summer learning goals, and (d) were given the opportunity to provide additional information to program planners.

Work Goals. Participants' work goals at pre-summer work experience were grouped according to how specific their goal was (a) non-work related (e.g., to help my parents; keep busy, n = 50), (b) generic work goal (e.g., to gain experience, n = 103), or (c) specific work goal including a specific location or type of work (e.g., work at Taco Bell, n = 18). This question was not asked at post-measure. The majority of participants (59%) being the summer with a generic work goal.

Work-Based knowledge. Participants indicated their level of agreement on a 4-point scale -- 4 being strongly agreed, and 1 being strongly disagreed -- with statements related to work-based knowledge: (a) being prepared for future employment, (b) transporting to and from work, (c) asking for help at work, and (d) following a work schedule. At pre-measure, average agreement for the four questions ranged from 3.32 to 3.54. At post-measure, average agreement for the four questions ranged from 3.33 to 3.55. There was a positive difference in participants' level of agreement between the pre/post-measures, although not statistically significant. Any difference between pre- and post-measure is likely due to chance.

Participants were also asked to answer three questions related to (a) writing a resume, (b) completing a job application, and (c) requesting time off. For all three questions, participants answered more questions correctly on the post-measure than they did on the pre-measure. Respondents answered more questions correctly at the post-measure than at pre-measure; however, the difference was not statistically significant, therefore any difference is likely due to chance.

Learning Goals for Summer. Participants were asked to identify what they wanted to learn from the summer work experience in seven areas. Three goal areas were either higher at pre-measure or unchanged between pre- and post-measures: (1) personal management, (2) leaderships skills, and (3) learning new job skills. After the summer work experience, more participants identified interest in learning (1) better communication skills with supervisors, (2) better communication skills with co-workers, (3) teamwork, and (4) self-confidence on the job, than at the start of the summer work experience.

Additional information. Participants could provide additional information to program staff at pre- and post-measures. At both times, all comments were positive. At pre-measure, responses related to messages for employers, personal work preferences, disability specific information, desire to learn, and appreciation. At post-measure, responses were grouped by advice to others, good experience, appreciation, future plans, and pride/self-confidence.

Summary. It is clear from these data that there is both interest in the Summer Work Program and benefit to students who participate. Different data is needed to determine the extent to which Goal 4 increases summer work experiences by blending and braiding funds from multiple agencies, and how this can be documented relative to Goal 4 of the ITA.

Goal 1: Full Report

Goal 1: Develop an Oregon universal release of information (ROI) combining ROI requirements from ODE, ODDS, & VR with review by legal counsel for sufficiency across agencies and then implement/ field test. This goal was completed.

The intent for this goal was to streamline the time it takes for a client to move through the key procedural milestones (e.g., from application to services). Having potential clients sign multiple releases of information was viewed as duplicative and inefficient, resulting in delay of services, especially when multiple agencies were involved in service delivery.

Challenge addressed

Oregon's Team hypothesized that duplicated paperwork such as requiring clients/potential clients to sign a separate release of information form for each agency they sought services from contributed to slowing clients' access to services, and ultimately to the intended outcome. To remedy this challenge, the Team proposed to develop and implement a single release of information form that all three agencies would use. The client/potential client would sign a single form containing the information requested from each agency, and that form would be sent to the other relevant agencies. Use of a single form would potentially eliminate the need for collaborating agencies to obtain separate release of information forms, thus reducing the amount of time spent waiting to receive information from other agencies.

The Team's theory of change was that if the three agencies (VR, ODDS, and Education) used the same release of information, then there would be less duplication of effort and redundancy across agencies, less burden on potential clients, and less time spent waiting for an initial signature or for a signed release of information form to be shared between agencies. The result would be faster movement from referral to services to closure for the client, as evidenced by the fewer number of days between each milestone in the process.

In 2017, as the NTACT team was working on this goal, the Oregon legislators passed SB 397, that "*directed certain state entities to create and use a common client confidentiality release form in order to: ▪ Streamline information sharing in support of providing integrated, coordinated and timely services; ▪ Identify trends and risks so that intervention is effective; and ▪ Promote optimal information sharing consistent with state and federal privacy laws*." Furthermore, the SB 397 directed the "*MSC 3010 Authorization for Disclosure, Sharing and Use of Individual Information will be used by governmental and other partners to streamline information sharing and enhance service provision….Beginning April 1st, 2019, the MSC 3010 must be used whenever a new authorization of information sharing is required*" (DHS Action Request Transmittal, 12/20/2018).

To fulfill SB 397 requirements, members of the OR NTACT team led the development of a statewide release of information. Listening sessions held with stakeholders informed the initial draft document, and a small scale pilot test was conducted in winter 2017. Revisions were made based on stakeholder feedback, and a second pilot test was conducted in 2018 with DHS and VR agencies in three counties. The final form, *MSC Form 3010, Authorization for Disclosure, Sharing and Use of Individual Information (aka Statewide Release of Information; ROI)* was released April 2019. Trainings were conducted via webinars and in-person trainings June through August 2019. Form 3010 was posted to the DHS forms portal in August 2019.

The ROI was evaluated through two methods. First, a paper/pencil or online survey following training sessions was used to measure effectiveness of the training sessions. Second, a time interval calculation to determine whether the amount of time taken to reach key procedural milestones within the system was different after implementing the ROI. It is important to recognize many factors contribute to time interval between key procedural milestones (e.g., application to plan).

Survey

To evaluate the effectiveness of the ROI trainings, a paper survey was distributed following each in-person training event and an online-survey was distributed in June 2020. All survey responses were anonymous; therefore, it is possible there is some redundancy in responses between the survey modes. The online survey was distributed June 8 - 23, 2020 to individuals affiliated with three state agencies:

- **Office of Development Disabilities** distributed it via the Employment First email list, including case management entities, employment providers, and Employment First stakeholders.
- **Oregon Department of Education** distributed it to school personnel through the Transition Network Facilitators.

- Vocational Rehabilitation distributed it to all VR staff, including administration staff, branch managers, vocational rehabilitation counselors (VRC) and support staff.

The online survey responses were combined with the in-person survey responses for a total of 393 responses. Table 1.1 shows the 393 respondents by the county in which they reported working. They represented 31 counties; 27 respondents reported working in multiple counties, 18 respondents did not report a county, 3 respondents reported by region, and 11 respondents identified as state representatives. Slightly less than half of the respondents (47%) reported being from six counties – Multnomah, Marion, Washington, Lane, Clackamas, and Deschutes.

Table 1.1 Number of Respondents (N = 393) per County

43	Lane	18	Other	8	Tillamook	5	Crook	3	Clatsop
39	Multnomah	15	Linn	7	Columbia	5	Lincoln	3	Harney
38	Marion	13	Jackson	7	Josephine	5	Yamhill	3	Hood River
27	Multiple Co.	13	Umatilla	7	Union	4	Curry	3	Wasco
24	Washington	11	State*	6	Jefferson	4	Grant	2	Morrow
21	Clackamas	8	Coos	6	Malheur	4	Klamath	2	Polk
20	Deschutes	8	Douglas	5	Benton	3	Baker	3	Region 1,2,3

Note: * state refers to a state-level representative (e.g., Transition Network Facilitators)

Table 1.2 shows the distribution of 393 respondents by the role they reported. The majority of respondents reported being School Personnel (42%), followed by VRC (15.8%), DD Personal Agents (7.6%), and Employment Providers (6.6%).

Table 1.2 Number of Respondents (N = 393) by Role

165	School/District Personnel	24	School/District Admin	5	School/District staff
62	VR Counselor	23	VR Support Staff	3	Brokerage/Brokerage Director
30	DD Personal Agent	13	DD Services Coordinator	2	CDDP Staff/Program Manager
26	Employment Provider	6	Provider Agency Representative	1	Benefits Counselor
26	Other: undefined; non-profit; SSA Program; transition specialist	6	Regional support staff	1	VR Manager Administrator

Of the 393 respondents to the survey, 103 (26%) respondents reported they had (a) heard about, (b) been trained, and (c) Oregon's Statewide Release of Information (ROI) form; 89 of these 103 respondents (86%) answered questions regarding their opinion about the overall utility of the form. The 23 counties represented by these 89 respondents are shown in Table 1.3, and respondents' roles are shown in Table 1.4. The majority of the respondents (n = 37) reported being from three counties – Multnomah, Lane, and Marion. The majority of the respondents (n = 66) reported their roles as VR counselor, DD personal agent, and school/district personnel.

Table 1.3 Number of respondents (n = 89) per county who had heard about, been trained, and used the ROI

13	Multnomah Co.	2	Coos Co.	1	Douglas Co.
12	Lane Co.	2	Josephine Co.	1	Harney Co.
12	Marion Co.	2	Linn Co.	1	Klamath Co.
8	Multiple Counties	2	Tillamook Co.	1	Morrow Co.
7	Deschutes Co.	1	Baker Co.	1	Union Co.
7	Washington Co.	1	Benton Co.	1	Wasco Co.
4	Umatilla Co.	1	Clackamas Co.	1	Yamhill Co.
3	Jackson Co.	1	Columbia Co.		
3	Other (not defined)	1	Crook Co.		

Table 1.4 Number of Respondents (n = 89) by Role

33	VR Counselor	9	VR Support Staff-HSA	2	Regional support staff
18	DD Personal Agent	5	DD Services Coordinator	1	Employment Provider
15	School/District Personnel	5	Other: undefined; Program Director; Lead Personal Agent	1	Employment Provider Administrator

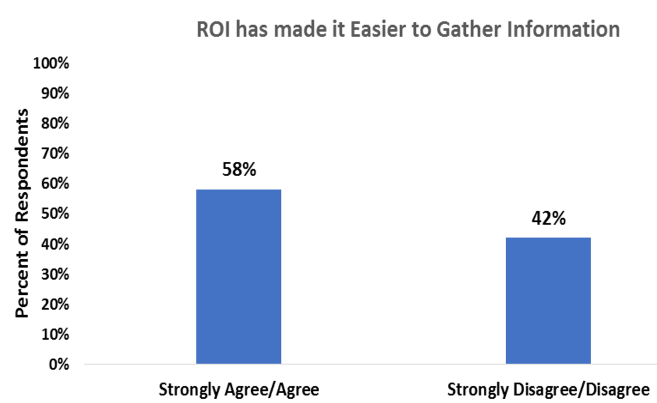
As a result of using the Statewide Release of Information form, the 89 respondents were asked to rate the extent to which they agreed with a set of statements using a 4-point scale where 4 = strongly agree, 3 = agree, 2 = disagree, and 1 = strongly disagree. Figures 1 through 5 show the percent of respondents reporting strongly agree/agree compared to strongly disagree/disagree for each statement.

Oregon's Statewide Release of Information form (ROI) has made it **easier** for me to gather information from multiple agencies supporting an applicant.

As seen in Figure 1.1, respondents are relatively similar with regard to whether the ROI made it easier for them to gather information from multiple agencies. Slightly greater than half of the 89 respondents (58%) strongly agreed or agreed the ROI made it easier to collect information from multiple agencies compared to 42% (n = 37) who strongly disagreed or disagreed that the ROI made it easier for them to collect information from multiple agencies.

Of the 37 who responded with *strongly disagree* or *disagree*, the majority were VRC (n = 13) and DD personal agents (n = 11).

Figure 1.1 Easier to Gather Information

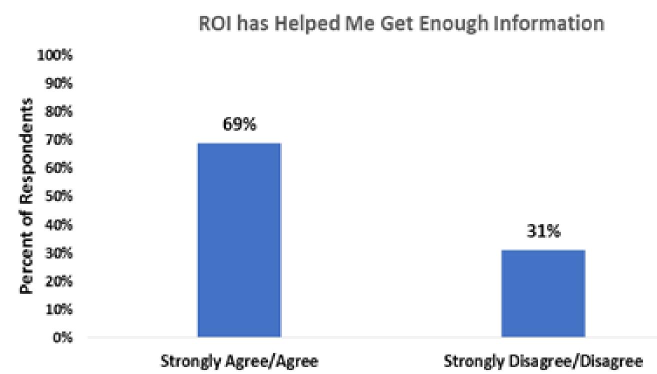


The ROI has **helped** me get enough information from multiple people to develop a student/client's plan.

As seen in Figure 1.2, 69% of the respondents strongly agreed or agreed that the ROI helped them get enough information to develop a student/client's plan, compared to 31% who strongly disagreed or disagreed.

Of those who responded with *strongly disagree* or *disagree*, the majority (64%) were VRC (n = 9) and DD personal agents (n = 9).

Figure 1.2 Helped Me Get Enough Information

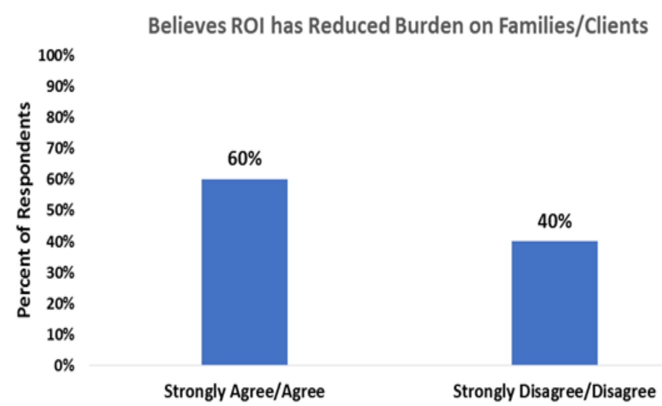


I believe the ROI has **reduced the burden on families and clients** by not requiring them to complete multiple release forms.

As seen in Figure 1.3, 60% of the respondents strongly agreed or agreed that the ROI reduced burden on families and clients, compared to 40% who strongly disagreed or disagreed the ROI reduced burden on families and clients.

Of those who responded with *strongly disagree* or *disagree*, the majority (66%) were VRC (n = 13) and DD personal agents (n = 11).

Figure 1.3 Reduced Burden on Families/Clients

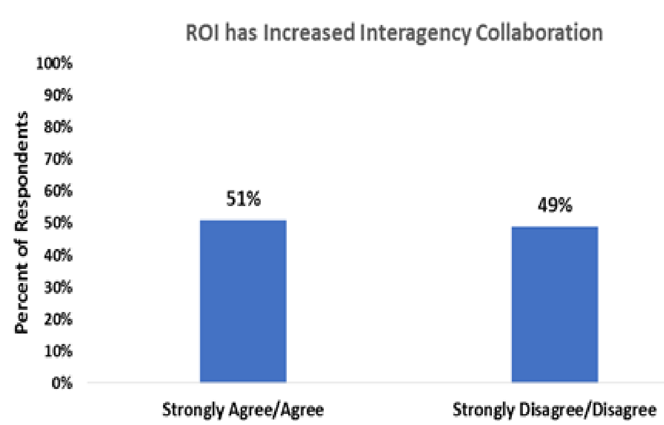


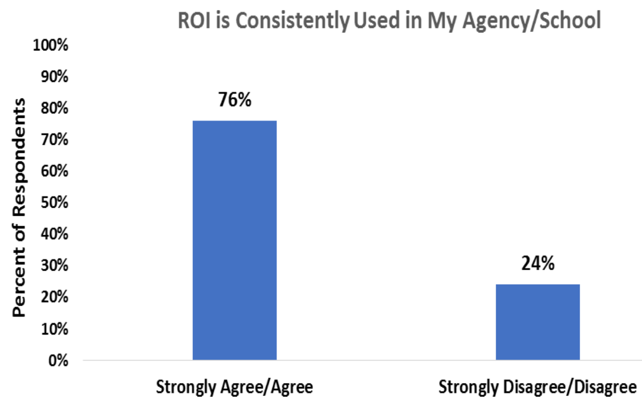
The ROI has **increased interagency collaboration**.

As seen in Figure 1.4, 51% of the respondents strongly agreed or agreed that the ROI has increased interagency collaboration, compared to 49% who strongly disagreed or disagreed that the ROI reduced burden on families and clients.

Of those who responded with *strongly disagree* or *disagree*, the majority (64%) were VRC (n = 17) and DD personal agents (n = 11).

Figure 1.4 ROI has Increased Interagency Collaboration



The ROI is consistently used in my agency/school	Figure 1.5 ROI is Consistently Used in My Agency/School
As seen in Figure 1.5, 76% of the respondents strongly agreed or agreed that the ROI is consistently used in their agency or school, compared to 24% who strongly disagreed or disagreed that the ROI consistently used in their agency or school. Of those who responded with *strongly disagree* or *disagree*, the majority (75%) were VRC (n = 9) and school/district personnel (n=7).	

Goal 1: Survey Open-Ended Questions- Highlights

Respondents were asked two open-ended questions related to how the ROI helped them serve students or clients, and what additional training is needed. The responses are organized below by question and themes associated with each question. When a single comment contained multiple statements that applied to different themes, the statement or relevant portion of the statement was distributed across more than one theme.

In general, the comments indicate users of the ROI could likely benefit from additional training and information about the purpose of the statewide ROI, how and when to use the new form in order to achieve the intended benefit of a single release of information form. All responses for both questions are in Appendix A.

1. **Briefly describe how the ROI has helped you serve students/clients?**

   Question 1 responses were clustered into positive and negative aspects of the ROI. Positive themes were related to (a) simplification, (b) time efficiency, and (c) helpfulness of Form 3010. Many respondents commented that the ROI simplified the process, and that it was easier to read and sign, that it contributed to less paperwork, and reduced burden on families. Sample comments include:

   - "*The 3010 has streamlined communication and transfer of eligibility documents to Vocational Rehabilitation*." DD Personal Agent
   - "*It has been easier to gather information from multiple agencies at one time*." VR Counselor
   - "*Having permission to exchange information with agencies and individuals on one document simplifies the entire process, from VR application to employment*." (DD Personal Agent)

   Several respondents indicated the ROI contributed to efficiency of the time related both to their time and the time it takes to gain information from other agencies. Sample comments include:

   - "*The condensed ROI helps me better serve customers by reducing time I would otherwise spend on administrative, non-billable tasks. Meaning, I have more time to provide services to customers*." (DD Services Coordinator)
   - "*It has decreased the amount of releases needed for inter-agency coordination.*" (DD Services Coordinator)

   A few respondents described the ROI as being helpful, with one respondent stating,

- “*I am unable to serve clients unless I have medical records and information to make them eligible. The ROI gives me the ability to attain that information. Also, if I have a client that works with multiple agencies and has a hard time signing documents, this helps narrow down the ROI to one signature.*” (VR Counselor).

Although there were several positive comments, respondents were generally more vocal about negative aspects of the ROI. Themes related to (a) confusion, (b) overcomplicated, (c) formatting issues, and (d) confidentiality concerns. Many respondents said they found the form confusing and overcomplicated, stating that is has not helped serve clients and youth and that it takes too long to complete. Sample comments include:

- “*It hasn't. My customers feel this form is not easy to understand and scares them, when it should be a form of empowerment of their info. This takes FOREVER to fill out and is not simple or easy to understand*.” (DD Services Coordinator)
- “*I have found it exceedingly tedious to use. It takes far longer than the agency ROI we used previously. It takes up to 20 minutes to fill out. Clients dislike the overly official look of it.*” (DD Personal Agent)
- “*The form is difficult to read and review. Due to privacy concerns, clients do not want multiple entities or individuals on a single form. The form is TOO LONG and if the client has multiple medical providers, it is unwieldy. We need something more simplified for requesting medical records. Clients have expressed dislike of the lengthy complicated form.”* (VR Counselor)

Many suggestions were given for ways to reformat/revise the form.

- “*There are formatting issues, especially the placement of the blanks that customers are required to initial (they frequently miss them as they are not near the signature page), but overall the form is a great tool*.” (DD Personal Agent)
- “*Redesigning the form to provide more room for information. And it is confusing as to if the agencies should be getting all the info on the form as well*.” (School/District Educator)

A few respondents stated confidentiality concerns that using one form to request information from multiple entities is a violation of privacy protections. Sample comments include:

- “*It actually violates the privacy and confidentiality rights of the client by assuming client will want to give access to information. Many just use independent releases for each agency to protect the client's privacy and honor the client's confidentiality*.” (VR Counselor)
- “*The way it is written allows for too much "behind the scenes" sharing of information without the initiating agency to be aware of such sharing. I believe it would be a lot more effective to have it so there was not sharing among the agencies, schools, etc. that were not the originators of the ROI. Each Agency and School should have a signed release from them to all the agencies, schools, providers on one form, but not allow any of the additional agencies, schools, providers to share information among themselves without their own ROI. Hope that makes sense*.” (CDDP Program Manager)

2. **What additional information or training is needed to address challenges or barriers for using the Statewide ROI (e.g.., more training, specific questions that need to be addressed, etc.)?**

Responses to this question clustered around (a) refresher training, (b) more overall guidance in how to use the form, (c) department/agency specific training, and (d) training on specific sections or features of the ROI. *Note: comments made* *in this question related to formatting were combined with similar comments in question 1*. A couple of respondents just suggested more training without specificity; and a few noted clients cannot complete the form independently.

A small number of respondents suggested general refresher training and/or more overall guidance in how to complete the form. One respondent indicated "*the training we received was opposite from the instructional video. It would be helpful to double check the training materials and the instructional video to ensure consistency between the two*."

Additional sample comments include:

- "*Many agencies we work with do not always have one specific point person, this form requires a point person rather than allowing a whole agency permission. Also, especially since we are not able to explain the form face to face with clients, it is overwhelming and hard for them to understand/read. I also feel it is really important to put out a workers guide for Case Managers to check to ensure they are putting the correct information*." (DD Personal Agent)
- "*Would be beneficial to attend a hands-on lab to practice filling the form*." (School/District Educator)

Relative to department/agency specific training, a couple of respondents indicated specific partner agencies, such as DD and WIOA partners needed more training.

- "*Even after having client fill out 3010, partner agencies like County DD want the client to fill out their ROI. But their ROI is the SAME as my ROI. Train DD*." (VR Counselor)
- "*I feel more trainings across agencies and WIOA partners is needed so that everyone knows how to use this form*." (VR Counselor)

A couple of respondents' requests for training on specific sections or features of the ROI seem to indicate a lack of understanding about the overall intent of the ROI. These comments were:

- "*How to combine multiple ROIs into one ROI. I often have my customers sign a few different ones based on different categories (general communication vs provider agencies that might include documents vs medical providers, etc.). It would be nice for them to only have to sign one ROI*." (DD Personal Agent)
- "*How to use the fill in features*." (VR Support Staff - Human Services Assistant)

Time Interval Calculation

Purpose

The purpose of this time calculation was to provide further insight into the effectiveness of the Statewide Release of Information, Form 3010, to see if the number of days changed between each key procedural milestone for the time periods.

Dataset

To explore this theory of change, data were obtained from VR consisting of three separate data files, one for each time period: pre-pilot, pilot, and post-pilot. The dataset contained 15 variables in each data file: Participant_ID, Case_Master_ID, App_Referral_Date, Application_Date, Eligibility_Date, Plan_Date, Closure_Date, Case_Status_Date, Case_Status, Service Category, Service SubCategory, Authorization Issue Date, Staff_Full_Name, and Branch_Name.

Although the original intent was to have 18 months of data for each time period, there was insufficient time to collect 18 months of data at the time of post-pilot. To keep the time periods as equal as possible, 6 months of data were used for the pre-pilot and post-pilot time periods, and 18 months for the pilot. Keeping the number of months pre-and post-pilot consistent, ensured continuity and decreased the likelihood that other external factors may have changed significantly on either side of the pilot time period to influence procedures or be reflected within the system (e.g., changes in economic factors). Although the pilot period is longer than the pre-and post-pilot timeframes, had the pilot period been reduced, it would likely not have been long enough to reflect changes in the system. Table 1.5 shows the date range for the three time periods, total number of rows of data, and total number of unique cases for each time period.

Table 1.5	Time Period		
	Pre-Pilot	Pilot	Post-Pilot
Six month date range based on referral date	10/1/17 - 3/31/18	4/1/18 - 9/30/19	10/1/19 - 3/31/20
Total rows of data	1487	4195	509
Total number of unique cases	93	273	76

Questions investigated

To determine whether there was a change in the number of days from key procedural milestones (e.g., referral to services to closure) before, during, and after use of a single release of information, a time interval calculation was conducted. The calculation was structured to generate six numbers for each key procedural milestone in each time period. The following key procedural milestones of the VR process were used in the calculation:

- a. Referral date to application date
- b. Referral date to eligibility date
- c. Referral date to plan date
- d. Referral date to 1st authorized service date; this category was subdivided into:
    - a. Records only, using only the Records request service in the calculation, and
    - b. 1st authorized service not a Records request, in which the Records request service was excluded and the date of the first authorized service was used in the calculation.
- e. Referral date to closure date; this category was subdivided into:
    - a. Closed Rehabilitation and PES
    - b. Closed Other

For each milestone in each time period, six numbers were calculated:

- a. Median referring to the midpoint between the least and greatest number of days to reach the milestone.
- b. Mean referring to the average number of days to reach the milestone.
- c. Minimum referring to the least number of days to reach the milestone.
- d. Maximum referring to the greatest number of days to reach the milestone.
- e. Mode referring to the most often occurring number of days to reach the milestone.
- f. Count referring to the total number of cases for that milestone in that time period.

The OR Team identified the following six broad questions to guide the time interval calculation. Findings are reported in the next section of this report.

1. How many days did it take for the case to go from <u>referral</u> date to:
    - a. Application date?
    - b. Eligibility date?
    - c. Plan date?
    - d. Service date?
        - i. Records request only
        - ii. 1st authorized service, not a Records request?
    - e. Closure date?
        - i. Closed Rehabilitation and PES
        - ii. Closed other date?

2. How many days did it take for the case to go from <u>application</u> to:

a. Services? This question was subdivided into:
   i. Records request service only
   ii. First authorized service other than a records request
b. Successful closure? This was defined as closed with a Rehabilitated or PES.
c. Successful placement? This question was determined to be the same as question b above, so Successful placement date was replaced with Closed other date?

3. Do participants' time in process vary based on track?
   a. Do track 1 participants go through the process faster/slower than participants on track 2?
   b. Do track 2 participants go through the process faster/slower than participants on track 3? There was insufficient data to answer this question, therefore it was eliminated.

4. Do track 2 participants go through the process faster/slower than participants on track 3?
   What percentage of plans were written within 90 days, (measured as application to plan)?

5. Is there a difference in the timeline based on case managers?
   a. Are there significant differences in the timelines for the two case managers who have used ROI, case manager A and case manager B compared to other case managers? There was insufficient information to answer this question, therefore it was eliminated.

Caveats

The following caveats must be kept in mind when reviewing the findings:

1. Many factors contribute to the time needed for clients to progress from referral to closure and the ROI is only one consideration.
2. This was an observational, exploratory investigation; therefore, no causal inferences can be drawn.
3. These data are from a sample of the population of cases and no tests have been conducted to determine whether the sample represents the total population. It is unlikely that these data represent all cases in the system.
4. Frequency counts and percentages are provided without statistical testing to determine whether an important difference exists across the time period. These data cannot be used to say any difference observed in time periods applies to all clients in the system during these time periods or beyond.

Findings

When examining the data tables, attention should be paid to the median and counts categories. Median refers to the midpoint between the least and greatest number of days to reach the milestone, taking into account extreme outliers in the range. Where the range includes extremely high or extremely low number of days, median gives a better representation of the typical value than the average number of days. Counts refer to the total number of cases for that milestone in that time period. The count of cases vary widely across the time period and the key procedural milestones.

1. **How many days did it take to go from <u>referral</u> date to each of the key procedural milestones?**
   Starting at referral date, it took fewer days for a case to reach each key procedural milestones at post-pilot than it did at pre-pilot. Data tables 1.5 to 1.13 below show the median, average, minimum/maximum, and mode number of days calculated for the time interval between each key procedural milestone.

   a. Referral date to Application date

Table 1.6	Pre-Pilot	Pilot	Post-Pilot
Median days	47	36	17
Average days	100	57	19
Minimum days	0	0	0
Maximum days	814	710	95
Mode days	33	35	8
Count of cases(n)	1487	4195	509

b. Referral date to Eligibility date

Table 1.7	Pre-Pilot	Pilot	Post-Pilot
Median days	102	83	59
Average days	146	99	59
Minimum days	8	0	3
Maximum days	855	721	149
Mode days	90	34	64
Counts (n)	1487	4193	509

c. Referral date to Plan date

Table 1.8	Pre-Pilot	Pilot	Post-Pilot
Median days	196	175	135
Average days	251	179	121
Minimum days	31	0	25
Maximum days	944	768	243
Mode days	166	175	33
Counts (n)	1479	4109	483

d. Referral date to Service date

This question was sorted into three categories: (1)all services, regardless of the number or type of services; (2) records request service only; and (3) first authorized service, other than a records request.

All services, regardless of the first type of service provided

Table 1.9	Pre-Pilot	Pilot	Post-Pilot
Median days	357	231	98
Average days	380	256	115
Minimum days	14	0	9
Maximum days	1042	863	308
Mode days	308	274	95
Counts (n)	1482	4159	503
Note: All services regardless of the number or type of service was included in this calculation.			

Records requests only

Table 1.10	Pre-Pilot	Pilot	Post-Pilot
Median days	79	62	35
Average days	151	89	39
Minimum days	20	7	10
Maximum days	825	720	110
Mode days	79	34	25
Counts (n)	233	756	142
Note: Records request was the only service included in this calculation.			

First Authorized Service, not a records request

Table 1.11	Pre-Pilot	Pilot	Post-Pilot
Median days	159	128	96
Average days	218	121	113
Minimum days	14	11	9
Maximum days	944	725	280
Mode days	203	102	235
Counts (n)	82	227	49
Note: Only the first authorized service (i.e. one service), that was not a records request, was included in this calculation.			

e. Referral date to Successful Closure – Closed Rehabilitated

Table 1.12	Pre-Pilot	Pilot	Post-Pilot
Median days	571	390	175
Average days	559	371	179
Minimum days	133	120	174
Maximum days	955	620	187
Mode days	854	413	174
Counts (n)	310	1088	28

f. Referral date to Closed Other date?

Table 1.13	Pre-Pilot	Pilot	Post-Pilot
Median days	760	398	214
Average days	690	387	193
Minimum days	167	90	88
Maximum days	1026	791	302
Mode days	760	413	158
Counts (n)	601	1757	24

2. **How many days did it take to go from application** date to key procedural milestones?
Starting at application date, it took fewer days for a case to reach each key procedural milestones at post-pilot than it did at pre-pilot. Data tables 1.14 to 1.18 below show the median, average, minimum/maximum, and mode number of days calculated for the time interval between each key procedural milestone.

a. Application date to Services
This question was sorted into three categories: (1)all services, regardless of the number or type of services; (2) records request service only; and (3) first authorized service, other than a records request.

i. All services, regardless of number or type of services

Table 1.14	Pre-Pilot	Pilot	Post-Pilot
Median days	248	169	75
Average days	280	199	96
Minimum days	0	0	2
Maximum days	990	807	286
Mode days	24	15	14
Counts (n)	1482	4159	509
Note: All services regardless of the number or type of service were included in this calculation.			

ii. Records request service only

Table 1.15	Pre-Pilot	Pilot	Post-Pilot
Median days	23	21	15
Average days	36	28	19
Minimum days	4	2	2
Maximum days	203	296	77
Mode days	24	15	14
Counts (n)	233	751	142
Note: Records request was the only service included in this calculation.			

iii. First authorized service, other than a records request

Table 1.16	Pre-Pilot	Pilot	Post-Pilot
Median days	90	77	24
Average days	116	104	94
Minimum days	0	0	2
Maximum days	499	643	238
Mode days	91	7	203
Counts (n)	82	227	49
Note: Only the first authorized service (i.e. one service), that was not a records request, was included in this calculation.			

b. Application date to Successful Closure. This was defined as closed with a Rehabilitated or PES.

Table 1.17	Pre-Pilot	Pilot	Post-Pilot
Median days	454	232	156
Average days	453	330	155
Minimum days	118	108	144
Maximum days	925	581	165
Mode days	731	358	156
Counts (n)	310	1088	28

c. Application date to Closed Other.

Table 1.18	Pre-Pilot	Pilot	Post-Pilot
Median days	730	339	172
Average days	624	339	172
Minimum days	125	44	75
Maximum days	931	773	275
Mode days	731	358	139
Counts (n)	601	1757	24

3. **Do participants' time in process vary based on track?**

a. Do track 1 participants go through the process faster/slower than participants on track 2?

As shown in Table 1.19, Track 2 participants generally moved through the process faster than Track 1 participants, when comparing pre-pilot to post-pilot time periods. There were a few exceptions to this pattern. Track 1 participants moved from referral to application faster than Track 2 participants at pre-post and post-pilot, and Track 2 participants moved from referral to eligibility faster at post-pilot than did Track 1 participants.

Table 1.19	Pre-Pilot		Pilot		Post-Pilot	
	Track 1	**Track 2**	**Track 1**	**Track 2**	**Track 1**	**Track 2**
Referral to Application	29	57	39	35	8	21
Referral to Eligibility	80	101	91	65	64	55
Referral to Plan	426	153	181	134	149	108
Referral to Any Closure	760	611	413	395	N/A	174
Referral to Auth 1st Serv	477	360	267	245	176	126
Application to Auth 1st Serv	448	241	228	178	168	118
Application to Plan	408	83	140	75	133	85
Application to Any Closure	731	512	358	308	N/A	156
Note: N/A = no closure dates						

4. **What percent of plans were written within 90 days?**
Table 1.20 shows the percent of cases that had a plan written in 90 days or less (a) considering all service categories, and (b) considering first authorized service, other than Records request categories. In general, the percent of cases with a plan written in 90 days or less when considering all service categories was higher at post-pilot (39.3%, n = 190/483) than at pre-pilot (26.2%, n = 388/1479) than at post-pilot. It is important to note the difference in the number of cases at the two time periods.

When considering only the first authorized service, the percent of cases that had a plan written in 90 days or less was essentially the same at pre-pilot (37.8%, n = 31/82) and post-pilot (37.5%, n=18/48). Again, it is important to note the number of cases for the two time periods.

Table 1.20 Percent of Cases with a Plan written in 90 days

Pre-Pilot	Pilot	Post-Pilot
26.2% (n=388/1479) of cases had a plan written in 90 days or less when considering all service categories **37.8%** (n = 31/82) of cases had a plan written in 90 days or less when considering only first authorized service, other than Records request	**33.0%** (n=1355/4109) of cases had a plan written in 90 days or less when considering all service categories **44.4%** (n= 96/216) of cases had a plan written in 90 days or less when considering only first authorized service, other than Records request	**39.3%** (n=190/483) of cases had a plan written in 90 days or less when considering all service categories **37.5%** (n=18/48) of cases had a plan written in 90 days or less when considering only first authorized service, other than Records request

Goal 2: Full Report

Introduction

Through Oregon's Intensive Technical Assistance Plan (ITA Plan) with the National Technical Assistance Center on Transition (NTACT), the state set Goal 2 as: *Oregon Department of Education (ODE), Office of Developmental Disability Services (ODDS), and Vocational Rehabilitation (VR) will develop and implement 36 cross agency professional development trainings (focused on employment opportunities for staff working in, VR, Parent Training Information (PTI), Developmental Disabilities, tribal VR, and education) to facilitate universal information sharing (individualized service plan [ISP], individualized plan for employment [IPE], individualized education program [IEP], summary of performance [SOP]), collaborative resource delivery, and promote shared outcome of employment for all transition age student with disabilities*". The intended short-term outcomes associated with the goal were to:

1. Increase ODDS resident providers' knowledge of employment opportunities that are available within ODE, VR systems
2. Increase resident providers' knowledge, attendance, and engagement in cross agency trainings and certifications

This goal was addressed through Regional Employment Collaboration (REC) trainings conducted by representatives from ODE, ODDS, and VR between May 2018 and December 2018. The purpose of the trainings was to help attendees gain a solid understanding of each member of a student's employment team and to identify points of collaboration between agencies to support a student from school to employment. Objectives for the six-hour training were for attendees to:

1. Provide an overview of team members and their roles (VR/ODDS/Local Education Agency(LEA)
2. Identify what and where is the point of collaboration for a student
3. Define and review the plans – IPE/IEP/ISP
4. Share the overall employment process and how these plans can overlap and compliment successful transferring from short-term supports (VR) to long-term supports (ODDS)

The morning agenda consisted of a discussion about:

(a) ODDS employment services,
(b) VR services,
(c) Job Stabilization,
(d) Long-term transfer of supports,
(e) Understanding the connection between the IEP and employment

The afternoon agenda focused on:

(a) How to write SMART goals and action plans collaboratively incorporating all three plans, the IEP, ISP and IPE.

Trainings were conducted in multiple locations across Oregon. Evaluations were received from trainings held in Baker, Benton, Clackamas, Coos, Hood River, Jackson, Klamath, Lane, Lincoln, Linn County, Marion-Polk, Multnomah, NW Regional ESD, Ontario, Redmond ESD, and Yamhill.

At the conclusion of the training, attendees were asked to evaluate five areas using a 4-point scale: (a) achieved outcomes, (b) usefulness of the content to them, (c) relevancy of the content to them, (d) perceived knowledge before and after the training, and (e) satisfaction. An open-ended prompt, "*provide any other comments you think are important for the event planners and presenters to know*", invited attendees to give additional feedback. Sign-in sheets were not available for all training locations; therefore, an overall response rate cannot be calculated.
Of the 10 sites for which sign-in sheets were available, the median response rate was 66% (n = 19 evaluations per site) and response rates ranged from 49% to (n = 27) to 100% (n = 20) for individual sites. In total, 379 individuals provided an evaluation. This is the summary of the evaluations.

Audience

The targeted audiences for this training were VR counselors and administrators, school/district educators and administrators, ODDS agents/service coordinators, employment providers/administrators, provider agency representatives, regional support staff, and other (e.g., job coach). Table 2.1 shows the number of attendees by each targeted audience.

Table 2.1 Number of Attendees by Audience

Audience	Number	Audience	Number
ODDS personal agent	87	VR manager/administrator	2
ODDS services coordinator	69	School/district administrator	1
Employment provider	51	Not Reported 5	34
School/district educators/staff	49	Other: Certified Supported Employment Professional, CESP SCBEC WorkSource, ID Program Manager, Job Coach, Job developer, Manager, PA, VR HSA, VR Intern	15
VR counselor	36		
Provider agency representative	15		
Regional support staff	12		
Employment provider administrator	8		
		Total	**379**

When grouped by agencies, most attendees were from ODDS (43%), followed by employment providers (21%), school/district staff (13%), and VR (11%); 13% did not identify with an agency or were regional support staff such as Transition Network Facilitators, or Youth Transition Program Technical Assistance Providers.

Achieved Outcomes

Attendees rated the extent to which each intended outcome was achieved using a 4-point scale (strongly agreed = 4, agreed = 3, disagreed = 2, and strongly disagreed = 1). Taken together, attendees strongly agreed or agreed that each intended outcome was achieved. Across the nine intended outcomes the average ratings for the achieved outcomes ranged from 3.41 to 3.17. The highest rated achieved outcome was *understanding the role of the VR counselor* with 94% of attendees strongly agreeing or agreeing that the outcome was achieved. The lowest rated achieved outcome was *understanding each agencies' plans and how they can support one another* with 85% of attendees strongly agreeing or agreeing that the outcome was achieved. Table 2.2 shows the overall percent of attendees who strongly agreed or agreed that the intended outcomes were reached, the average rating, and corresponding standard deviation by each intended outcome.

Table 2.2 Achieved Outcomes

Intended Outcomes	% reporting strongly agree/ agree	Avg.	Standard Deviation
I understand the role of a VR Counselor in providing transition services to students.	94%	3.39	.526
I understand the purpose of cross-agency collaboration to providing transition services to students.	93%	3.63	.543
I understand the role of a DD case manager/personal agent in providing transition services to students.	93%	3.39	.552
I understand the role of the educators in providing transition services to students.	89%	3.30	.594
This training helped me know who to contact when I have a question about transition services to students.	88%	3.41	.613
I understand ODDS services available for transition-aged youth.	88%	3.24	.598
I understand the VR services available for transition-aged youth.	88%	3.26	.586
I can use this information immediately in providing transition services to students.	85%	3.27	.658
I understand each of the agencies' plans and how they can support one another.	85%	3.17	.608

To determine whether differences in achieved outcomes were observed by training site or attendees' roles, chi square tests were run. Relative to the achieved outcomes, differences were observed by attendees' roles. Specifically, those who identified as ODDS attendees disagreed at statistically significant higher rates than other attendees with the following statements:

- I understand the role of a VR Counselor in providing transition services to students, $X^2(8, N = 153) = 29.27, p < .01$.
- I understand the role of the educators in providing transition services to students, $X^2(8, N = 153) = 52.02, p < .01$
- I understand the VR services available for transition-aged youth, $X^2(8, N = 153) = 40.58, p < .01$
- I can use this information immediately in providing transition services to students, $X^2(8, N = 153) = 34.77, p < .01$

Although statistically significant differences were not observed by training sites, program planners may want to consider the following observation when determining future content or trainings. There were three sites in which 10% or more of the respondents said they disagreed or strongly disagreed that the outcome was achieved on four of the nine (44%) intended outcomes. Table 2.3 in Appendix B shows which sites had 10% or more of the respondents indicate the intended outcomes were not achieved.

Usefulness and Relevancy of Information

Respondents rated whether they thought the information presented in the training was useful and relevant to them. In this context, usefulness meant information could be applied in a practical or meaningful way, whereas relevant meant the information was appropriate to the attendees. Although similar, it is important to understand these ideas separately as it is possible for some attendees to find the information is appropriate (i.e., relevant) for their role, but not practical (i.e., useful). For example, attendees may find the information on writing S.M.A.R.T. goals relevant, but not useful because they are not responsible for writing S.M.A.R.T. goals.

Usefulness of the information was rated on a 4-point scale consisting of extremely useful (4), useful (3), somewhat useful (2), and not useful (1) (see Table 2.4). Overall, respondents rated the information as extremely useful or useful, with average ratings ranging from 3.35 to 2.93. Information about the employment planning process was rated as extremely useful or useful by 88% of attendees. Information about the pre-employment transition services and how to request those services were rated extremely useful or useful by 65% and 66% of attendees, respectively.

Relevancy of the information was rated on a 4-point scale consisting of extremely relevant (4), relevant (3), somewhat relevant (2), and not relevant (1). Overall, attendees rated the information as extremely relevant or relevant, with average ratings ranging from 3.41 to 3.01. As with usefulness, information about the employment planning process was rated as extremely relevant or relevant by the majority (83%) of attendees. Information about how to write S.M.A.R.T. goals and pre-employment transition services were rated extremely relevant or relevant by 66% and 63% of attendees, respectively. It is important to note that two questions, "*how I can support each agency's plan*" and "*how to request pre-employment transition services*", were rated as relevant with averages rating of 3.22 and 3.01, respectively, in spite of having high amounts of missing data (see Table 2.4). Those who responded to these questions found the information relevant.

Table 2.4. Usefulness and Relevance

Based on your role, the information about…	…Was Useful		…Was Relevant	
	% reporting agree/strongly agree	Average (Standard Deviation)	% reporting agree/strongly agree	Average (Standard Deviation)
… the employment planning process	88%	3.35(.608)	83%	3.41 (.602)
…how I can support each agency's plan	84%	3.23(.674)	26%*	3.22 (.786)
… each agency's resources to assist in successful transition planning	84%	3.22(.640)	74%	3.27 (.661)
… pre-employment transition services (Pre-ETS)	65%	2.93(.854)	63%	3.06 (.826)
… how to request Pre-ETS	66%	2.97(.862)	27%**	3.01 (.822)
…community resources that can assist in successful transition of services between agencies	81%	3.21(.676)	73%	3.21 (.708)
… community partnerships and practices	84%	3.29(.674)	74%	3.30 (.666)
…how to write S.M.A.R.T. goals	73%	3.17(.799)	66%	3.24 (.750)
Note: *69% missing data; ** 64% missing data				

These findings should be viewed with caution for two reasons. First, it appears respondents had difficulty distinguishing between usefulness and relevancy. This resulted in higher than expected amounts of missing data on the relevancy scale, ranging of 11.6% to 23.5% missing, compared to a range of 4.5% to 12.1% missing on the usefulness scale. Furthermore, several attendees made notes on the evaluation (e.g., writing "duplicate", and crossing through the relevance section) in lieu of answering the entire set of question. Second, the formatting of the evaluation resulted in two questions within the relevancy section being skipped at a much higher rate than the other questions in this section. This resulted in 69% and 64% missing data for questions related to *support [ing] each agency's plan*, and *requesting pre-ETS* .

Perceived Change in Knowledge Before and After the Training

Measuring attendees' perceived change in their knowledge or understanding is one way to estimate whether attendees think they acquired the intended knowledge or skill from the training. At the conclusion of the training, attendees were asked to reflect on their knowledge or understanding of the nine indicators and rate their level of knowledge, (low = 1 to 4 = high), before and after the training. Figure 1 shows how attendees rated their knowledge before and after the training on nine questions. Across all questions, respondents indicated their perceived knowledge was higher at post-assessment than it was at pre-assessment, indicating respondents thought they gained information from the training. As seen in Figure 1, respondents' understanding of how to refer students for Pre-ETS showed the greatest change in perceived knowledge, from average of 2.02 before the training to 2.77 after the training; a change of three-quarters of a point. Respondents' understanding of the ISP used in ODDS showed the least change in perceived knowledge, from 3.29 before the training to 3.56 after the training; a change of just over a quarter of a point (.27).

To determine whether perceived changes in knowledge before and after the training were significant, a paired samples t-test was conducted for each question. Table 2.5 shows the group mean (M), standard deviation (SD), number of respondents (n) on each knowledge indicator before and after the training, as well as the confidence intervals (CI) for the mean differences, t statistic (t), and degrees of freedom (df).
For all nine knowledge statements, there were statistically significant differences, at the .05 level of significance, between attendees' knowledge and understanding before and after the training. This means attendees indicated a meaningful perceived increase in their knowledge after the training. Across each question, change in knowledge increased approximately one-half a point (range .27 to .75).

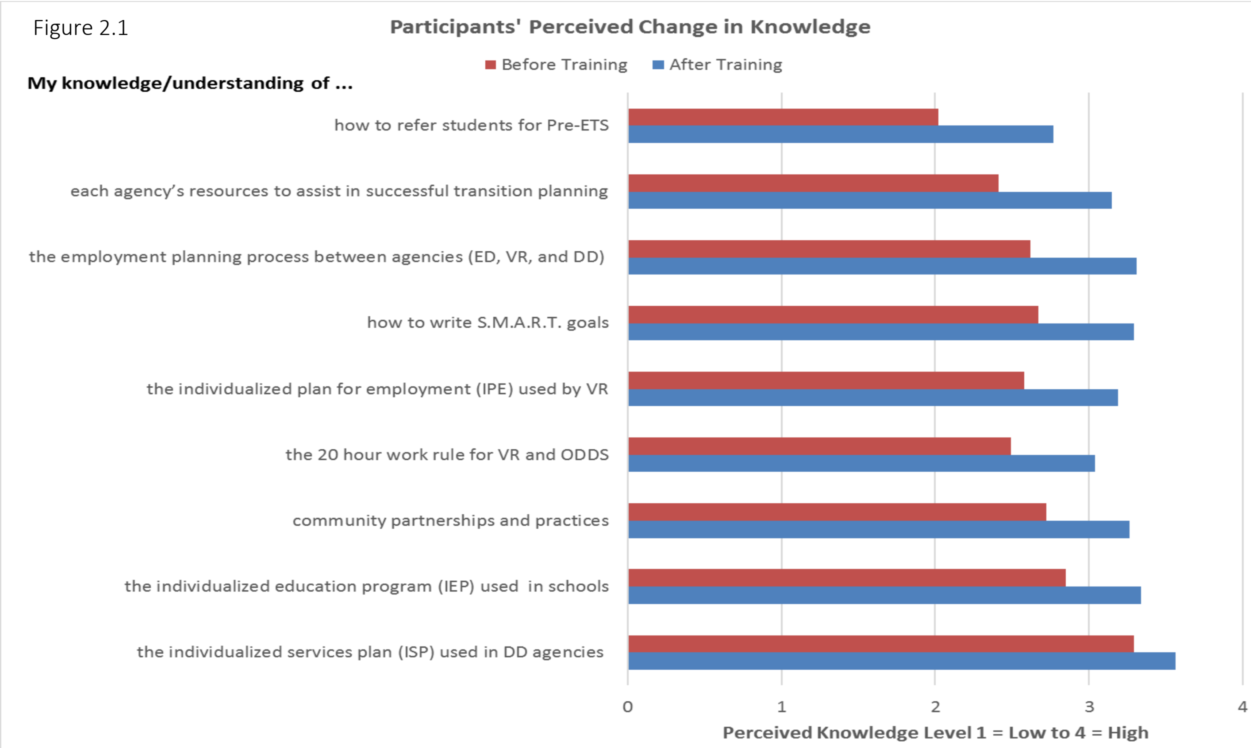


Table 2.5 Results of t-test and descriptive statistics by each knowledge/understanding indicator

Knowledge or Understanding of...	Group: Before M	Before SD	Before n	After M	After SD	After n	95% CI for Mean Difference	t	df
20 hour work rule for VR and ODDS	2.49	1.10	283	3.04	.992	283	-.641, -.454	-11.53*	282
individualized education program	2.85	.961	286	3.34	.676	286	-.572, -.421	-12.97*	285
individualized services plan	3.29	.876	290	3.56	.592	290	-.340, -.205	-7.91*	289
individualized plan for employment	2.58	.966	291	3.19	.730	291	-.689, -.257	-14.76*	390
employment planning process	2.62	.896	291	3.31	.649	291	-.774, -.614	-17.06*	290
agency's resources	2.41	.812	280	3.15	.714	280	-.821, -.651	-17.72*	279
pre-employment transition services	2.02	.937	282	2.77	.880	282	-.848, -.663	-16.11*	281
community partnerships and practices	2.72	.848	284	3.26	.648	284	-.613, -.472	-15.19*	283
how to write S.M.A.R.T. goals	2.67	.998	283	3.29	.785	283	-.709, -.528	-13.45*	282

*p <.05.

Satisfaction

Satisfaction is an important consideration when providing professional development. Although the intent of a training is not to make attendees happy, if attendees are unhappy with the meeting logistics (e.g., registration glitches, parking, room temperature) they are less likely to want to attend future trainings. For this reason, understanding what contributed to attendees' satisfaction with any training is worth investigating.

Respondents rated their level of agreement with the following statements on a 4-point scale (4 = strongly agree to 1 = strongly disagree). As seen in Table 2.6, overall respondents were generally satisfied with the training. Average ratings ranged from 3.68 to 3.42, with 87% agreeing or strongly agreeing the presenters were knowledgeable about the topic, and 75% agreeing or strongly agreeing the training was a good use of their time.

Table 2.6 Overall Satisfaction

Overall Satisfaction	% reporting agree/strongly agree	Avg.	Standard Deviation
Presenters were knowledgeable about the topic.	87%	3.68	.499
Communication about meeting logistics (i.e., location, time) was sufficient.	85%	3.52	.552
The meeting location was convenient.	83%	3.61	.590
Presenters' style of presentation helped me learn new information.	81%	3.48	.645
I was comfortable asking questions.	81%	3.51	.650
I would recommend this training to colleagues.	76%	3.43	.739
This training was a good use of my time.	75%	3.42	.745

Open Ended Responses

Respondents were given the opportunity to provide additional information about the training through an open-ended prompt: "*In the space below provide any other comments you think are important for the event planners and presenters to know*." In total, the 74 comments clustered around five themes: (a) appreciation, (b) expressions of benefit, (c) not helpful/not beneficial, (d) considerations for future trainings, and (e) miscellaneous; each theme had multiple subthemes. The themes are summarized below; all comments are in Appendix B.

Holistically, the comments were positive, constructive, and consistent with other evaluation data. Several respondents expressed appreciation/benefit for the training opportunity. Positive comments exceeded other themes and focused on

a. content (e.g., "*I really appreciated the acronym cheat sheet*"),
b. collaboration/teaming opportunity (e.g., "*The 15 minutes in the beginning to meet others at the table and discuss why we do the work we do was very valuable and connective!*"),
c. naming specific presenters, and
d. the general training (e.g., "*This was a great training to have cross-agency conversations & understand other systems. Would be great to have again*!").

Some respondents referenced agency conflicts and specific elements of the content that they considered not helpful or beneficial. Agency conflicts centered around the VR agency, and content related comments focused on wanting more specific information (e.g., "*more in-depth information about VR, IPE*"). A few respondents indicated the training was targeted to people who had more experience, while a few respondents indicated the training was better suited for those with less experience.

Several respondents offered advice for future trainings related to (a) having trainings more regularly, (b) inviting more educators/education staff, (c) including specific content, (d) structuring the meeting differently, and (e) providing materials. Respondents requested more information about the different timelines and procedures/processes associated with each agency. It is important to note that one respondent reported, "*Some info shared was inconsistent with rules, laws, and policies*"; although this comment was made by only one respondent, event planners should double-check content to ensure there was consistency across the trainings. Suggestions were also made to integrate videos into the presentation, rather than have them at the end of the training, and provide paper copies of materials for all participants when doing group work.

There were a few miscellaneous subthemes related to (a) time (e.g., "*Do not do this on a Friday*", and "*time was good*"), (b) meeting logistics-space, and food (e.g., "*free parking would be great!*", "*snacks and coffee*"), and one person felt the need to apologize, "*Sorry I got overly excited*".

Considerations for Future Trainings

Results of the evaluations completed by the 379 respondents from 16 trainings indicate that the intended outcomes were met, knowledge was gained, and respondents were generally satisfied with the training. Although not all training sites were represented in the evaluation results, 379 respondents provided actionable information for event planners when considering whether to provide additional trainings. Should future trainings be conducted, it is important to identify strategies for obtaining evaluations from more training sites. Respondents from the trainings conducted in 2018 were primarily from ODDS (41%). Overall results may have differed if the number of attendees was balanced across other agencies.

For this summary, 10% was used as the cut point for the percent of respondents saying they disagree/strongly disagree thereby indicating something may have gone awry or may be unique to a specific training site. Said another way, if fewer than 90% of respondents said an intended outcome was not achieved, it warrants a closer look at the individual training. This cut point percentage may be too stringent. Program planners should discuss and decide what percentage they are willing to tolerate. Once a cut point has been set, program planners should examine differences in training sites where that percentage is exceeded. There may be unique needs, circumstances, and or characteristics (e.g., materials, content, presenters) in these sites that suggest different training content and or delivery methods are needed to achieve outcomes.

Next Steps

Goal 2.1 was completed. The short-term outcomes associated with this goal were to:

- Increase ODDS resident providers' knowledge of employment opportunities that are available within ODE, and VR systems
- Increase resident providers' knowledge, attendance, and engagement in cross agency trainings and certifications.

Results of this evaluation indicate the first short-term outcome was achieved. The extent to which the second short-term outcome was or can be achieved should be discussed with Oregon's Team, along with the intermediate outcomes for the goal. Data sources beyond the training evaluations are needed to determine whether the intermediate outcomes have been achieved. Intermediate outcomes were:

- Increased number of targeted trainings
- Increased number of responsiveness trainings
- Increased in resident provider's engagement in the access of systems by attending meetings
- Increased number of cross agency participation in trainings & certification programs
- Increase the number cross agency opportunities and services to increase overall capacity for service delivery

Goal 2.2 was added and was continued: "*ODE including CTE, VR, ODDS will develop and implement round 2 of cross agency professional development trainings (content focus will be determined by evaluations from round 1 REC and include the benefits and opportunities for SWD to participate in CTE, Job Accommodation Network (JAN*)."

Goal 3: Develop and provide professional development trainings adapted for families and foster and group home family support about the Individual Service Plan (ISP),individual Education Plan (IEP), Individual plan for employment (IPE) and Summary of Performance (SOP), and Oregon universal release of Information (ROI) as well as on eligibility requirements and needs of each agency in order to provide coordinated services to youth. This goal was continued.

Updates Feb. 2020

- Will be online by April 2020– will have material soon that can be shared with the NTACT team.
- Will need to do pre and posttest by March
- May want to look at not only knowledge but what happens after the training in terms of coordinated services to youth

Goal 4: Full Report

RFA 4448 – 2018 Summer Work Program Feedback Summary

Introduction

Goal 4: "*to increase summer work experiences for 100 students with disabilities (SWD) by blending funds from Oregon Department of Education (ODE), Office of Developmental Disability Services (ODDS), and Vocational Rehabilitation (VR)*." After initially meeting the goal of serving 100 students, this goal was revised in 2017 to: "*sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments*." The intended short-term outcome associated with the goal was to increase the understanding of how money can be blended from federal and state regulations. The intended intermediate outcomes were:

- Increased blending and braiding funding in existing MOUs and contracts, (i.e. summer employment, assessments, work experiences in school, job coaching, shared Transition Network Facilitators [TNF]); and
- Increased capacity and resources across agencies and programs.

To help the state attain the intermediate outcomes and inform their decisions regarding the blending and braiding of funds across agencies, student participant outcome data were collected. These data are intended to help the state develop policies and track outcomes, provide technical assistance to help providers think about sustainability and develop a local plan and MOU to commit sources of funding for sustainability. This is the summary of the student outcome data.

During summer 2018, Oregon's Vocational Rehabilitation supported a summer work program (RFA 4448) designed to provide youth with barriers to employment an opportunity to gain work experience. The initial goal, as specified through the Intensive Technical Assistance Plan (ITA Plan) with the National Technical Assistance Center on Transition (NTACT), was to serve 100 students. Based on the number of student participants, this goal was exceeded.

In total, 262 youth participated in summer work programs slotted for 305 youth, an 86% participation rate. Of these, 162 participants provided a pre- and post-measure (62% response rate). Program sites that provided only pre- or post-measures were excluded from this analysis, as were individual participants who were missing either a pre-and/or post-measure.

School or provider hosting summer work program.

Pre- and post-measures were collected from the following 13 local sites and their participants:
Abilitree (n=22), Ant Farm (n=72), Collaborative Employment Initiative (CEI) (n = 28), College Dream (n = 22), Corbett (n=8), Eugene (n =12), Garten (n = 14), Grant ESD (n = 28), LCSD (n = 30), Molalla (n = 12), Reynolds (n = 16), Springfield Public Schools (n = 30), Umatilla (n = 30).

Work Goals:

Participants were asked to state their work goals pre- and post-summer work experience. Their statements were coded as to how specific their goal was (a) non-work related (e.g., to help my parents; keep busy; go to school), (b) generic work goal (e.g., to gain experience, to work), or (c) specific work goal that included a named location or type of work (e.g., work at Taco Bell; be a vet tech). Table 4.1 shows the number of statements for each category at time of pre- and post-measures. Non-work-related statements did not appear to represent a pattern across sites. Demographic data of participants were not collected on this measure; therefore it is not possible to examine responses by different participant characteristics.

Table 4.1 Number and type of goal statements

Type of Goal Statements	Pre-Measure	Post-Measure
Non-work related	22	53
Generic work goal	115	75
Specific work goal	25	34

Work-based knowledge

Participants were asked to indicate their level of *agreement*, using a 4-point scale, with statements related to work-based knowledge: (a) being prepared for future employment, (b) transporting to and from work, (c) asking for help at work, and (d) following a work schedule. As seen in Table 4.2, the agreement statements overwhelmingly favor agreement and strong agreement on all four questions at both pre- and post-measures. Participants' level of agreement with the statements increased between pre- and post-measures and there was a statistically significant difference between scores for pre-measure (M = 3.38, SD = .43) and post-measure (M = 3.5, SD = .47); t (161) = -3.87, p = .000. This means there was a positive difference in participants' level of agreement between the first and second measures.

Table 4.2 Level of agreement for work-based knowledge

Based on my experience…	% reporting Strongly Agree or Agree	Average At Pre	Average At Post
5. The summer work experience program will better prepare me for future employment.	Pre (98%) Post (98%)	3.50	3.63
6. I know how to arrange and plan my transportation to and from work.	Pre (88%) Post (93%)	3.27	3.36
7. I know how to ask for help when learning a new job task.	Pre (93%) Post (98%)	3.36	3.52
8. I know how to follow a work schedule.	Pre (94%) Post (97%)	3.43	3.66

Participants were also asked to indicate the correct answer on three questions related to (a) writing a resume, (b) completing a job application, and (c) requesting accommodations. Table 4.3 shows the percent of correct answers at pre- and post-measure. For each question, participants answered more questions correctly on the post-measure than they did on the pre-measure, indicating a gain in knowledge between measures. There was a statistically significant difference between scores for pre-test (M = 2.34, SD = .92) and post-test (M = 2.56, SD = .80); t (161) = -3.45, p = .001.

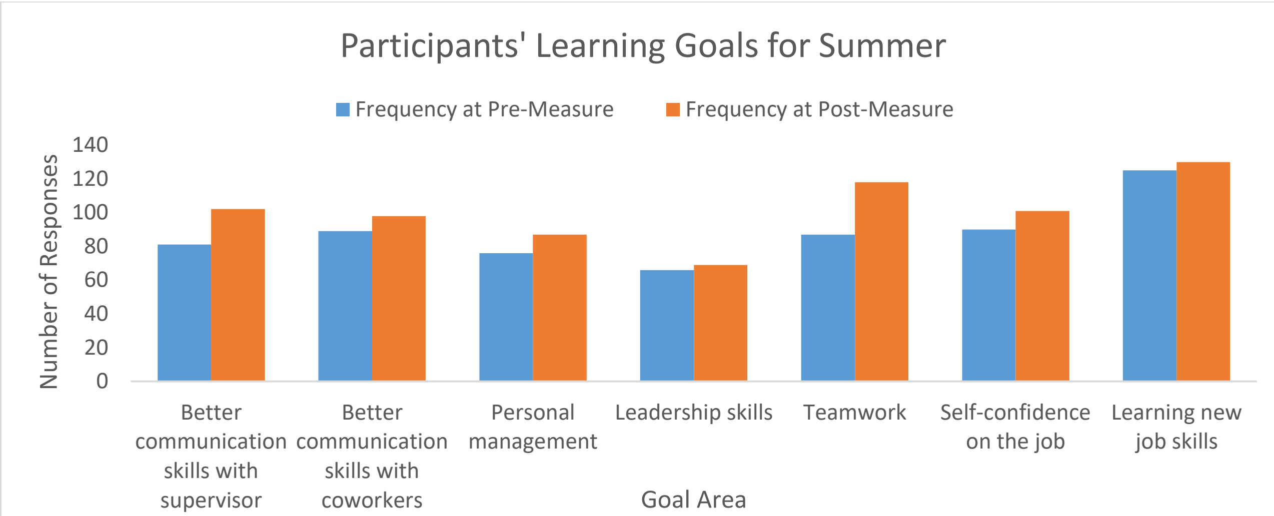
Table 4.3 Percent of correct answers

	Please circle one answer for each question below: CORRECT ANSWER	Percent Correct @ Pre (N = 162)	Percent Correct @ Post (N = 162)
9. Which of the following should be included on a resume?	A. Your full legal name, address and phone number B. Your past jobs and the dates you worked there C. Name and phone number of three references D. All of the above	n = 137 (85%)	n = 147 (91%)
10. When you fill out a job application, what should you do if the question does not apply to you?	A. Write in pencil so you can change your answer later B. Write NA or N/A C. Leave the answer blank D. Make up an answer	n = 127 (78%)	n = 135 (83%)
11. If you need an accommodation on the job, what is the best way to do this?	A. Send your boss a text with what you need. B. Tell your coworkers what you need as you will be working with them more. C. Schedule time to talk with your boss, and come prepared with the accommodation needed and why in writing. D. Tell your boss what you need and make them figure out the accommodation.	n = 115 (71%)	n = 133 (82%)

Learning Goals for Summer

Participants were asked to identify what they wanted to learn from the summer work experience. Figure 4.1 shows the number of responses for each goal area: (a) better communication skills with supervisor, (b) better communication with co-workers, (c) personal management, (d) leadership skills, (e) teamwork, (f) self-confidence on the job, and/or (g) learning new job skills. Without exception, more participants expressed interest in each area at post-measure than at pre-measure.

Figure 4.1 Participants' Learning Goals for Summer



Additional information

Participants were given the opportunity to provide additional information. Participants made a variety of comments, with twice as many comments being made at post-measure than at pre-measure. The comments at pre- and post-measure were positive. At pre-measure, the 11 responses were categorized by two topics – nervousness, and miscellaneous; four participants acknowledged being nervous or scared about starting their summer work program. Miscellaneous comments focused on participants' goals related to the project. All comments are reported verbatim.

Pre-Experience Comments

Nervousness:

- I am nervous and excited
- I feel scared because it was something new
- I am very nervous to start this program because I'm not sure how I will do
- Very nervous to get started

Miscellaneous comments

- Learn new skills
- Work hard
- A career
- I want to learn how to work with large amounts of people at a time
- Want to learn how to follow a work schedule
- Go to the direction of my career
- I'm enjoying my work experience at Metro East community media

At post-measure, the 22 responses were categorized by four topics – continued working, advice to others, miscellaneous, and things learned. At post-measure, three participants commented that they continued working after the summer program, either by being hired in their job or finding another one. Most participants' comments (n = 12) focused on the things they learned (e.g., new skills, self-confidence, becoming comfortable at work). A few participants offered advice to their friends (e.g., participate in the program) and to the program creators (e.g., needed to be paid more hourly due to responsibilities with insurance, car, etc.). Unless otherwise noted, all comments are verbatim.

Post-Experience Comments:

Continued working:

- Worked at Old McDonald Farm and am still working there.
- Work at Sugarpine and they hired me.
- Worked at Lavender Farm and got a job at Mayon(?)

Advice:

- If I had the chance to do this again, I would. I would also tell my friends to join because it is fun and you learn new skills to better your future.
- For some of the work that was being done maybe increase pay. For example, on me I drive, pay for insurance, and a cell phone bill, but by the time I drive to work and I don't make much money. Other than that it was good.

Miscellaneous:

- Didn't like forest service too much
- Money is easy to make
- Worked at Sugarpine and Old McDonald Farm
- I liked the program

Things learned:

- It went good and I learned new skills.
- How to work in real word, no complaining, self-confidence.
- Learn to work with my coworkers I'll be working with
- It was a good experience in teaching me how to be better prepared for the workforce.
- I gained a lot of work experience, like how to be a more independent worker. At this point what I want for work is to learn more about how to do my best work. "It was a pleasure"
- I have become adaptable to working and feel like I can get comfortable working anywhere now.
- The program was so worth participating in for the Summer, I learned how to talk to customers the right way and how to take food orders. I got my food handlers card and learned how to cut fruit and make food the right way. It was a lot of fun and I made money for my trips.
- Learned the work skills to find a full time job at a detail shop in town.
- I enjoyed the teamwork that they have out at the golf course, it taught me how to work with a team. Also being hired by them once the program ended.
- It was fun, I learned some things about what I want for my future.
- I think this program will help any student who wants a job.
- Doing this program was amazing. It taught me a lot of things, both good and bad, about working and in the time working I got to meet a lot of new people. It was a success.

Observations and Considerations for Future Planning

The interest in the Summer Work Program is clear based on the number of sites and youth participants. More than 85% of the approved slots for 2018 were utilized. It's encouraging that more than 60% of the participants provided pre- and post-measures. A response rate in the 85% to 90% range would ensure broader representation of the program participants. Program planners should work with participating sites to identify strategies for obtaining more responses from participants. It would also be important to distinguish between participants who completed the program but did not complete the post-measure and participants did not complete the program, and therefore were not eligible to complete the post-measure. Collecting demographic characteristics would also allow for determining how well youth with different characteristics are represented in the summer work opportunities.

Relative to goal statements, it was somewhat surprising that more than twice as many participants made non-work related and generic statements at the post-measure than at pre-measure. This could be due to a number of factors, including lack of time for participants to reflect, or a change in their desired goal as a result of their experiences. The purpose of capturing these data and the extent to which these statements are intended to reflect anything more than generic statements should be reviewed by program designers. For example, do program planners expect participants to be more specific in their goal statements (i.e., naming a place or type of work)? Given the degree of agreement at pre-measure, program planners may want to consider different knowledge related questions to ask with future groups of youth.

Of the three knowledge focused questions, participants had the least knowledge of accommodation at both pre- and post-measures. Program planners should consider whether these topics are the most appropriate or whether other knowledge-based questions would be more appropriate. Options might be to focus only on workers' rights to accommodations or develop questions related to the learning goal areas (e.g., teamwork and communication).

As to learning goal areas, more participants expressed interest in each goal area at post-measure than at pre-measure. This phenomenon should be explored to understand what participants learned and what they still wanted to learn after the program ended. One possibility for the increase at post-measure is that students gained some awareness about what they did not know through the summer program. Program planners may want to explore these topics with future participants.

Noteworthy in the additional information comments is at pre-measure, multiple participants acknowledged being nervous about starting the program. If there were youth who started the program and did not complete it, program planners should look at the reasons for non-completion to see if anxiety may have been a contributing factor. Also noteworthy at post-measure was that a few participants reported continuing to work in their summer job placement or having obtained another job. Program planners may want to consider a brief follow-up with previous participants to determine whether they are working and what, if any, influence the summer work program had on their employment (e.g., are they continuing to work there, do they have plans to work at the same or similar place in the future).

Finally, program planners should think about the ultimate outcome –employment after exit from high school and determine what support participants of the summer work program may need to reach the ultimate outcome. Looking beyond a one-and-done experience, how can summer work program participants continue to receive support to reach their employment goals? For example, were youth in the summer work program served in the Youth Transition Program (YTP), and if so, how could their YTP experience build on and continue the learning that occurred in the Summer Work Program? If these participants were not engaged with YTP, should a referral to YTP or other work-based transition focused programs be made?

Conclusion & Next Steps

Based on the results of the pre-post measures from student participants, the 2018 Summer Work Program was a success and should be celebrated. Program planners should use the information in this report, and any participant satisfaction results, to consider what, if any, changes are warranted to future summer work programs.

It is important to keep in mind that the purpose of collecting student participant outcome data was to inform the broader activities needed to support blending and braiding of funds -- increased capacity and resources across agencies and sustainability -- by informing policy development, guiding technical assistance to help providers think about sustainability, and developing a local plan or memorandum of understanding to commit sources of funding for sustainability. The success of the summer work program, based on student data, does not address the progress or success of obtaining the short-term or intermediate outcomes related to blending and braiding funds.

Relative to Goal 4 of the ITA Plan, these results should provide impetus for addressing the intended short-term and intermediate outcomes associated with Goal 4 – identifying and making the changes needed to the three agencies' infrastructure to enable blending and braiding of funds to sustain opportunities for students to gain employment skills through the summer work program. Looking at the success of the summer work program in the context of blending and braiding funds is the next step.

2019 Summer Work Program (RFA 4708) Feedback Summary

Full Report

Introduction

Goal 4 of Oregon's Intensive Technical Assistance Plan (ITA Plan) with NTACT was "*to increase summer work experiences for 100 students with disabilities (SWD) by blending funds from Oregon Department of Education (ODE), Office of Developmental Disability Services (ODDS), and Vocational Rehabilitation (VR)*." After initially meeting the goal of serving 100 students, this goal was revised in 2017 to: "*sustain summer work experience programs for students with disabilities by evaluating policy and procedures to guide future investments*."

The intended short-term outcomes associated with the goal were to increase the understanding of how money can be blended from federal and state agencies. The intended intermediate outcomes were:

- Increased blending and braiding funding in existing MOUs and contracts, (i.e. summer employment, assessments, work experiences in school, job coaching, shared Transition Network Facilitators [TNF]); and
- Increased capacity and resources across agencies and programs.

To help the state attain the intermediate outcomes and inform their decisions regarding the blending and braiding of funds across agencies, student participant outcome data were collected. These data are intended to help the state (a) develop policies and track outcomes, (b) provide technical assistance to help providers think about sustainability, and (c) develop a local plan and MOU to commit sources of funding for sustainability. This summary is for participant data in summer 2019.

During summer 2019, Oregon's VR supported a summer work program (RFA 4708) designed to provide students who experience barriers to employment an opportunity to gain work experience. The initial goal of serving 100 students, as specified through the Intensive Technical Assistance Plan (ITA Plan) with NTACT, was met in 2016.

In summer 2019, a total of 26 funded programs were provided 440 slots and 400 slots were filled, resulting in a 91% participation rate. Of the 400 participants, 178 (44%) were students with IDD. Pre-or post-measures were returned for 281 of the 400 student participants. Unfortunately, 91 participants were missing either a pre- or post-measure, or substantial data were missing from one of the measures. Additionally, 15 individuals returned duplicates of either the pre- or post-measure. This left 175 participants (44% response rate) who provided a pre-and post-measure.

School or Provider Hosting a Summer Work Program.

In 2019, 26 programs provided students a summer work experience through RFA 4708. A total of 21 programs returned pre- and post-measures; however data from three programs were excluded due to missing data. This evaluation is based on pre- and post-measures collected from 175 participants in the following 18 programs:

Ant Farm (n = 47)	Arc of Lane Co. (n = 7)	Baker (n = 9)
Central Point (n = 6)	Corbett (n = 5)	Grant ESD (n = 4)
Harney (n = 9)	Klamath Works (n = 7)	Opportunity Foundation (n = 5)
Pearl Buck (n = 6)	Portland Public School (n = 6)	Redmond (n = 8)
Reynolds (n = 7)	Salem/Keizer (n = 11)	Springfield Public Schools (n = 8)
Umatilla (n = 7)	Vernonia (n = 5)	Youth Rising (n =12)

Work Goals

Participants were asked about their work goals prior to starting the summer work experience. Their statements were coded as to how specific their goal was: (a) non-work related (e.g., to help my parents; keep busy; go to school), (b) generic work goal (e.g., to gain experience, to work), or (c) specific work goal that included a named location or type of work (e.g., work at Taco Bell; be a vet tech). Table 4.5 shows the number of statements for 2019 at pre-measure; this question was not asked at post-measure. Pre-measure 2018 data are provided as a comparator. Non-work-related statements did not appear to represent a pattern across programs. Demographic data of participants were not collected on this measure; therefore, it is impossible to examine responses by different participant characteristics.

Table 4.5 Number and type of goal statements

Type of Goal Statements	Pre-Measure 2018	Pre-Measure 2019
Non-work related (e.g., weed my yard; pay off my truck; make money)	22	50
Generic work goal (e.g., work hard; gain experience, job skills for the future)	115	103
Specific work goal (e.g., CNA, chef, get a job at [specific place])	25	18

At post-measure, participants were asked three additional questions. Responses follow each question:

1. What type of work did you do this summer? Landscaping and food service experiences were the two types of summer work in which most students participated, 19% and 18%, respectively. Table 4.6 shows the full list.

Table 4.6 Number of Participants in Each Type of Summer Work (percent)

33 Landscaping (19%)	**3** Providing information to customers (2%)
31 Food services (preparing drinks, snacks, food) (18%)	**3** Receiving/processing money/customer payments (2%)
26 Other, not related (e.g., sheriff, volunteer) (15%)	**2** Design, art, engineering or the desire to create (1%)
17 Retail (10%)	**1** Caring for children/infants (1%)
16 Cleaning/organizing (9%)	**1** Office work (1%)
15 Working with hands/physical labor (9%)	**1** Stocking/moving items (1%)
13 Working outdoors (7%)	**0** Presenting in front of a group (0%)
10 Caring for animals (e.g., doggie daycare) (6%)	**0** Speaking/interacting with customers (0%)

2. Do you want to do this type of work after you graduate from high school?
   Yes: 104/157 = 66% **No:** 53/157 = 34%

3. Did your summer job match what you want to do after graduating from high school?
   Yes: 83/157 = 53% **No:** 63/157 = 40%

The majority of summer work experienced by students was categorized as landscaping (n = 33, e.g., pulling weed, gardening), food services (n = 31, e.g., barista, dishwasher, culinary), other types of work experiences (e.g., volunteer, sheriff's office, operations, health services) (n =26), followed next by retail (n = 17, e.g., Grocery Outlet), cleaning/organizing (n = 16, e.g., janitorial, packing/cleaning) and working with hands/physical labor (n = 15, e.g., trail work, painting), and working outdoors (n = 13). It is likely that these broad categories could be more specific or work categorized differently if additional detail were included in the description. This categorization is based on interpretation of what students reported.

The majority (66%) of participants indicated the work they did in the summer work program was the type of work they wanted to pursue after graduating from high school. Additionally, more than half of the participants (53%) indicated they thought their summer work experience matched the type of job they want after high school.

Work-Based Knowledge

Agreement questions. Participants were asked to indicate their level of *agreement*, using a 4-point scale, with statements related to work-based knowledge: (a) being prepared for future employment, (b) transporting to and from work, (c) asking for help at work, and (d) following a work schedule. As seen in Table 4.7, the agreement statements favor *agreement* and *strong agreement* on all four questions at both pre-and post-measures. As a group, participants' level of agreement with the statements essentially stayed the same between pre-measure (M = 3.42, SD = .43) and post-measure (M = 3.48, SD = .41); thus, there was not a statistically significant difference between measures, t(168) = -1.911, p = .05. This means participants' level of agreement as a group on all four statements did not change between the first and second measures.

Looking at individual questions, only question #9, "*I know how to ask for help when learning a new job task*" was statistically different between pre-measure (M = 3.47, SD = .62) and post-measure (M = 3.55, SD = .57), t(166) = -2.80, p = .00. This means more respondents indicated they knew how to ask for help at the post-measure than knew how to ask for help at the pre-measure and the change is unlikely to have occurred due to chance. Agreement with the other three statements (#7, 8, and 10) were not statically significant between pre- and post-measures.

Table 4.7 Level of agreement for work-based knowledge

Based on my experience…	Strongly Agree (4)	Agree (3)	Disagree (2)	Strongly Disagree (1)	Average
7. The summer work experience program will better prepare me for future employment.	Pre n = 91 (54%) Post n = 93 (55%)	Pre n = 77 (45%) Post n = 73 (43%)	Pre n 3= (0%) Post n = 2 (2%)	Pre n = 0 (0%) Post n = 0 (0%)	Pre 3.54 Post 3.53
8. I know how to arrange and plan my transportation to and from work.	Pre n = 71 (43%) Post n = 74 (44%)	Pre n = 80 (48%) Post n = 80 (47%)	Pre n = 12 (7%) Post n = 13 (8%)	Pre n = 4 (2%) Post n = 2 (1%)	Pre 3.32 Post 3.33
9. I know how to ask for help when learning a new job task.	Pre n = 80 (48%) Post n = 99 (59%)	Pre n = 72 (43%) Post n = 65 (39%)	Pre n = 14 (8%) Post n = 4 (2%)	Pre n = 1 (.6%) Post n = 1 (.6%)	Pre 3.47 Post 3.55
10. I know how to follow a work schedule.	Pre n = 94 (57%) Post n = 98 (58%)	Pre n = 61 (37%) Post n = 63 (38%)	Pre n = 9 (5%) Post n = 6 (7%)	Pre n = 2 (1%) Post n = 1 (.6%)	Pre 3.51 Post 3.53

Knowledge questions. Participants were also asked to indicate the correct answer on three questions related to (a) writing a resume, (b) completing a job application, and (c) requesting time off. Table 4.8 shows the percent of correct answers at pre- and post-measure. For each question, participants answered more questions correctly on the post-measure than they did on the pre-measure, indicating some change in knowledge between measures. Taken as a group, there was not a statistically significant difference between scores for pre-measure (M = 1.46, SD = .68) and post- measure (M = 1.57, SD = .62); t(174) = -1.85, p = .06. This means although more respondents answered the questions correctly at the post-measure than at pre-measure, the difference is likely due to chance.

Table 4.8 Percent of correct answers for knowledge questions

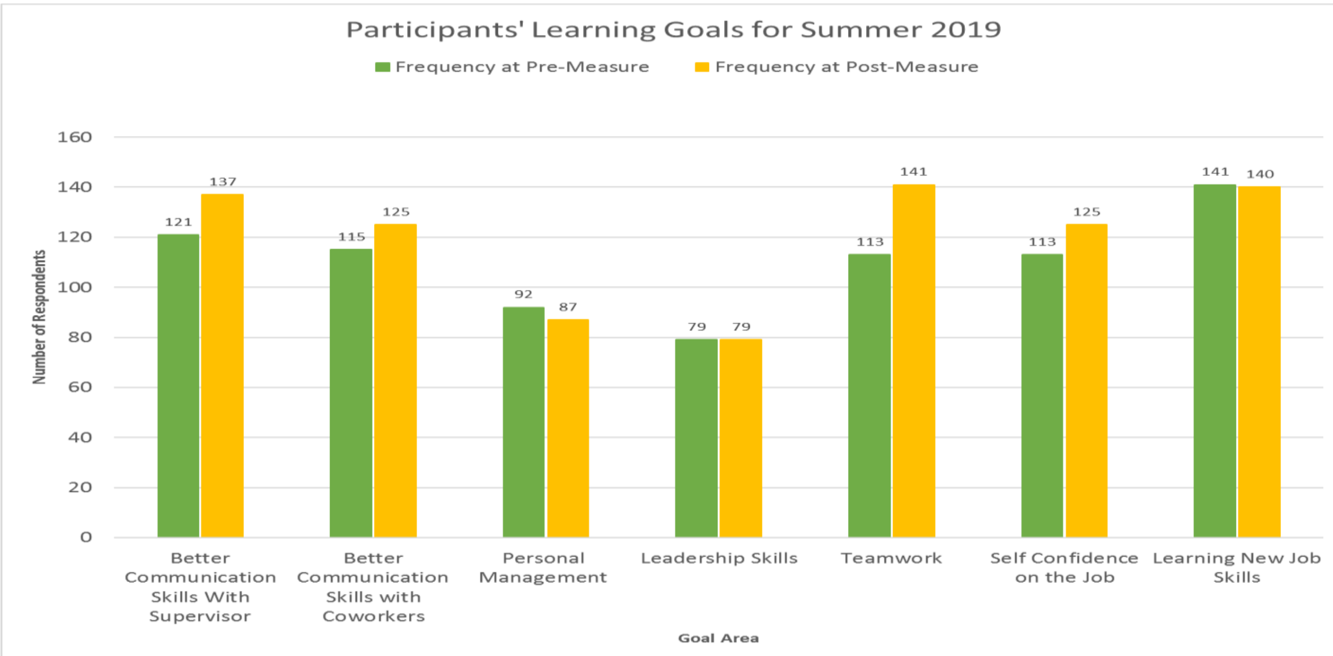
	Please circle one answer for each question below: CORRECT ANSWER	Percent Correct Pre (N = 162)	Percent Correct Post (N = 162)
11. Which of the following should be included on a resume?	E. Your full legal name, address and phone number F. Your past jobs and the dates you worked there G. Name and phone number of three references H. All of the above	82% (n = 144)	85% (n = 148)
12. When you fill out a job application, what should you do if the question does not apply to you?	E. Write in pencil so you can change your answer later F. Write NA or N/A G. Leave the answer blank H. Make up an answer	64% (n = 112)	73% (n = 127)
13. What is the best way to ask for time off or a change in your work schedule from your boss?	E. Send a text saying, "Hey dude, I ain't working on Saturday. Find someone else?" F. Call and leave a message saying, "Hey, um, like, I, um want um like, I need to like have like Friday off. Like okay." G. Send an email saying, "I am scheduled to work Saturday from 1pm to 6pm, and I would like to trade days with Jon who works on Sunday from 1pm to 6pm. Would you mind if we trade shifts?" H. Ask to meet in person and say, "I know Saturday is really busy day but I want to go to a movie, so can I cut out early?"	77% (n = 134)	83% (n = 146)

Learning Goals for Summer

Participants were asked to identify what skills they wanted to learn at the start of the summer work experience (pre-measure) and what they had learned (post-measure) from the summer work experience. Figure 4.2 shows the number of respondents who identified a learning goal in the following skill areas: (a) better communication skills with supervisor, (b) better communication with co-workers, (c) personal management, (d) leadership skills, (e) teamwork, (f) self-confidence on the job, and/or (g) learning new job skills.

Three goal areas were either higher at pre-measure or unchanged between pre- and post-measures: (1) Personal management, (2) leaderships skills, and (3) learning new job skills. After the summer work experience, more participants identified interest in learning (1) better communication skills with supervisors, (2) better communication skills with co-workers, (3) teamwork, and (4) self-confidence on the job than at the start of the summer work experience. In 2018, without exception, more participants expressed interest in each goal area at post-measure than at pre-measure.

Figure 4.2 Participants' Learning Goals for Summer



Additional Information

Participants were given the opportunity to provide additional information to the people working with them during the summer. Participants made a variety of comments, with approximately as many comments being made at post-measure (n = 68) as were made at pre-measure (n =62). The comments were positive at both time periods.

At pre-measure, the responses were categorized, in no particular order, by the following broad topics:

1. Messages for employers (e.g., days they are unable to work; scheduling questions)
2. Personal work preferences, strengths (e.g., I'm hard working; a fast worker; doesn't like heat; I'm willing to learn)
3. Disclosed specific disability or characteristics
4. Desire to learn, gain skills, or goals (e.g., I want to learn about…; future plans), and
5. Appreciation (e.g., thank you, this will be amazing)

At post-measure, the responses were categorized, in no particular order, by the following broad topics:

1. Advice to others (e.g., do your best; you should do it [work]; kill it with kindness)
2. Good experience (e.g., I enjoyed it; I had fun; great experience)
3. Appreciation (e.g., thank you; thanks for helping me out)
4. Future plans (e.g., I hope to …next year), and
5. Pride/self-confidence (e.g., I'm proud I…)

In 2018, pre-measure comments focused on an expression of nervousness or general comments, whereas post-measure comments focused on what was learned and sharing successes (e.g., continuing to work). In 2019, pre-measure comments were more specific, addressing employers and describing personal attributes; post-measure comments included advice, expression of pride, appreciation, and positive experiences.

Observations and Considerations for Future Planning

Having served 400 students, 44% of whom qualified as having an intellectual or developmental disability, there is clearly interest and need in the Summer Work Program. Unfortunately, only 44% (n = 175) of the participants provided pre-and post-measures. A response rate in the 85% to 90% range would ensure broader representation of the program participants.

Relative to the evaluation, several difficulties were observed with data received from the 2019 program. First, data from more than 100 participants were excluded from analysis due to (a) missing either a pre- or post-measure, (b) having duplicate pre-or post-measure, or (c) missing substantial information within a pre-or post-measure. The effect of more than one-third missing data is that the results may not represent the entirety of the program.

Program coordinators should work with participating programs to identify strategies for obtaining more responses from participants. One strategy that is being considered is making the evaluation available through an online platform. It would also be important to distinguish between participants who completed the program but did not complete the post-measure and participants who did not complete the program, and therefore were not eligible to complete the post-measure. Collecting demographic characteristics would also allow for determining how well students with different characteristics are represented in the summer work opportunities.

Conclusion and Next Step

Based on the results of the pre-post measures from student participants, the 2019 Summer Work Program was again successful and should be celebrated. Program planners should use the information in this report, and any participant satisfaction results, to consider what, if any, changes are warranted to future summer work programs.

It is important to keep in mind that the purpose of collecting student participant outcome data was to inform the broader activities needed to support blending and braiding of funds -- increased capacity and resources across agencies and sustainability -- by informing policy development, guiding technical assistance to help providers think about sustainability, and developing a local plan or memorandum of understanding to commit sources of funding for sustainability. The success of the summer work program, based on student data, does not address the progress or success of obtaining the short-term or intermediate outcomes related to blending and braiding funds.

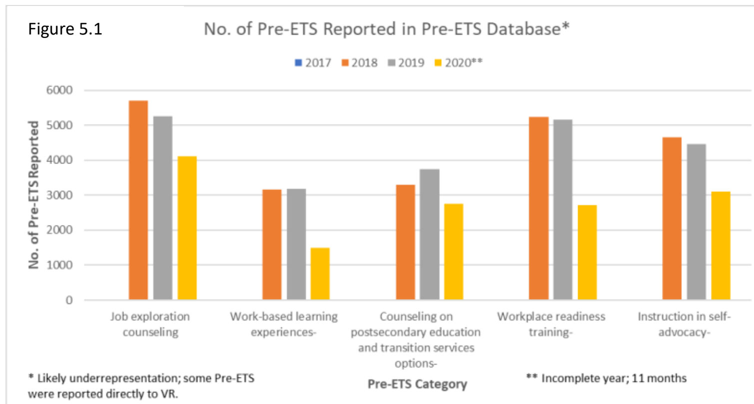
Relative to Goal 4 of the ITA Plan, these results should provide impetus for addressing the intended short-term and intermediate outcomes associated with Goal 4, namely, identifying and making the changes needed to the three agencies' infrastructure to enable blending and braiding of funds to sustain opportunities for students to gain employment skills through the summer work program. Looking at the success of the Summer Work Program in the context of blending and braiding funds for the purpose of the ITA goal is the next step.

Goal 5: Develop a data collection method to capture Pre employment transition services (Pre-ETS) activities as required by Workforce Innovation Opportunity Act (WIOA) occurring in high schools and transition programs without a YTP contract. This goal was completed.

This goal was achieved in 2017 and full implementation began in 2018. Although initially planned for use by individuals other than YTP transition specialists, these data were entered by YTP transition specialists who delivered Pre-ETS. It is important to note, *these numbers were taken from the Pre-ETS database maintained by the University of Oregon. It is likely these data underrepresent the total number of Pre-ETS delivered as some Pre-ETS were reported directly to VR and not entered in the database. It is also important to note that **only a partial year of data were reported in 2020 at the time data were pulled.

Overall, from July 2017 through December 2020, VR data show 19,218 students receiving 67, 376 Pre-ETS.

Figure 5.1. Across the last four years, the three most frequently reported Pre-ETS in the Pre-ETS database were: 1. Job Exploration, 2. Workplace Readiness Training, and 3. Instruction in Self-Advocacy. These were followed by 4. Counseling on Postsecondary Education and Transition Services Options, and 5. Work-Based Learning Experiences. Although data were included for 2017, the numbers were so small as to not be visible in Figure 5.1.



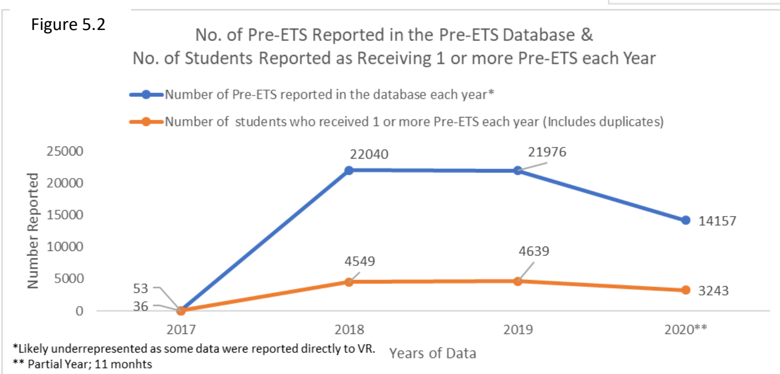


Figure 5.2 Shows the cumulative number of Pre-ETS reported in the Pre-ETS database for years 2017 through 2020 and the cumulative number of students reported in the Pre-ETS database for the same years.

Table 5.1 Shows the frequency, duration, and when the Pre-ETS are delivered. With the exception of 2017, between 2018 and 2020, most Pre-ETS reported in the database occurred one time, lasted between 30 to 60 minutes, and took place during a class activity.

Note, *These numbers likely underrepresent the number of pre-ETS delivered, as some Pre-ETS were reported directly to VR. **Only a partial year of data were reported in 2020.

Table 5.1

	2017	2018	2019	2020**
No. of times each Frequency category was recorded*	1 time 29 > 10 24	1 time 9922 2--5 5582 6--10 1592 > 10 2675	1 time 12094 2--5 5710 6--10 1626 > 10 2529	1 time 7394 2--5 4030 6--10 957 > 10 1776
No. of times for each Duration category was recorded*	< 30 mins 30 > 6 hrs 23	1--3 hrs 5386 3--6 hrs 1459 30-60 mins 7161 < 30 mins 3185 > 6 hrs 1080	1--3 hrs 6002 3--6 hrs 1337 30-60 mins 8892 < 30 mins 4500 > 6 hrs 1212	1-3 hours 2936 3-6 hours 350 30-60 mins 5693 < 30 mins 4545 > 6 hours 633
No. of times "When" a Pre-ETS occurred*	Class activity 30 Non-class 14 Summer M–F 9	After school 1057 Class activity 9128 Non-class 6272 Summer M-F 1387 Sat and/or Sun 193	After school 1243 Class activity 10371 Outside class 8785 Summer M-F 1307 Sat and/or Sun 231	After school 1182 Class activity 7587 Non-class 7306 Summer M-F 1696 Sat and/or Sun 180

Note: * Likely underrepresented as some Pre-ETS were reported directly to VR. ** Partial year;

Goal 6: Cross agency team will develop an educational version of the discovery tool to be used by educators to document discovery-like activities completed during the student's educational programming. This goal was continued.

Status as of February 2020:

- Have finalized a discovery tool and policy
- WISE training should be coming and anticipating training by April. Will run training for three months.
- Recruit a teacher or school district that is interested to try out the Discovery. Teachers could start using it in the fall.

The COVID-19 pandemic disrupted implementation of this goal in March 2020.

Appendices

Appendix A:

Goal 1: ROI Survey Responses to Open-Ended Questions

All responses retained verbatim, unless otherwise noted.

Question 1: Briefly describe how the Statewide ROI has helped you serve clients.

Theme	Response
Confusing	- All it did was confuse issues. It doesn't work. We can't put parents for 18 and up year olds on a release with schools as there are a few clients that don't want parents involved but the school records are fine to get access to. - Its hard to read, it's confusing for the clients and the users. It did nothing but add a different ROI form to all our forms. It is not effective or useful to all the VRC's I've talked to. It's just made our jobs harder for VR. May work for different DHS agencies, which have different needs, but it's not designed to work for VR and it's clients. - Feel the form is confusing and there is not enough room to write multiple agency info on it. Prefer our district form instead. - It hasn't changed the way I help serve my clients. It has added confusion to our collaboration. - It has not helped, it has made things more confusing and tedious. - It has not. I think the ROI is confusing and cumbersome. - It hasn't. - It hasn't. My customers feel this form is not easy to understand and scares them, when it should be a form of empowerment of their info. This takes FOREVER to fill out and is not simple or easy to understand. - The form is extremely confusing and difficult to use - in my opinion - It is a confusingly put together document. It is difficult to explain how to use the form to new staff. It is not intuitive. Also, since it is the only ROI we can use it makes getting medical information from providers more difficult.
Overcomplicated	- If it was done to save the client from signing so many documents, it didn't. It won't. - Full Access had a release of information that was simplified that previously allowed us to share information with other agencies so, the ROI hasn't improved this process from my experience and instead, is a complicated form that takes up more time to complete. - I have found it exceedingly tedious to use. It takes far longer than the agency ROI we used previously. It takes up to 20 minutes to fill out. Clients dislike the overly official look of it. Forms should not require a special training to utilize. - The form works well if you are doing interagency, program, or school district. For all other uses, such as requesting medical information, if is too cumbersome. - The Statewide ROI has not helped or changed the way I serve clients. It is cumbersome, repetitive, and in many cases with brokerage clients, not applicable (such as getting a release to speak to a family member. who lives at the same address, and/or has no fax number, etc.)

	- Actually use if wanted but we already have ROIs that are needed. Too much paper work at once. - Going from maybe one page to 4+ pages has made it a little annoying for some families, considering that most the time the addresses are not entered in the forms because working with different counties. - Simplify it or let us use our own internal ROI's :) - The form is very cumbersome to fill out and you need multiple forms for certain entities and documentation (i.e. one specifically for VR referrals, one for DSA/provider agencies, one for TriMet eligibility). It's more work than the previous method. - This needs to be simplified. It is way too much. It is not user friendly. It is not easy to change. It is not easy to add people into. I do not have any good feedback or positive experiences to share. - Believe it or not, I would rather use a separate ROI for each entity. It is easier - This new ROI seems to only complicated my job with my clients and partners. - It's actually made our jobs and interactions with our clients more difficult. - This takes a lot of extra time and does not specifically address concerns in my job. It has created more work and seems to be specifically for VR.
Formatting Issues	- Hard to read. - I still have to have clients sign at least 5 different ROIs to request information and they all say different things depending on what entity they are used for. They all look the same, so it is difficult when conducting virtual meetings for clients to distinguish between them. - It has not helped me serve clients. The form is clunky, long, difficult to navigate, difficult to make changes to - I spend far too much time working on this form and it takes away from time that I could be using to do person centered planning and to support clients to reach their goals. - It is a more legit looking document than our previous ROI. It makes it clear if there are certain documents the customer is approving to be shared versus only verbal consultation. - There are formatting issues, especially the placement of the blanks that customers are required to initial (they frequently miss them as they are not near the signature page), but overall the form is a great tool. - The form is difficult to read, interpret, has too many boxes...ex. "other" with drop downs...is not easy to use. - The form does not provide a signature line for guardians with relationship identification to the individual which is in violation of HIPPA, which we know we're not HIPPA, but the providers we send this to require this for minors. Form needs to be updated. Replace "Printed Name" line with "Guardian/Relationship to Individual" line to meet providers needs. - Redesigning the form to provide more room for information. And it is confusing as to if the agencies should be getting all the info on the form as well.

Confidentiality Concerns	- It actually violates the privacy and confidentiality rights of the client by assuming client will want to give access to information. Many just use independent releases for each agency to protect the client's privacy and honor the client's confidentiality. - Statewide ROI is in use because I am required to use it, however it is a breach of my professional Code of Ethics to exclusively use it as it is designed--it opens the door to potential breach of confidentiality by having multiple entities listed for records requests. So when I use it, I end up doing multiple ROIs for clients when I am seeking records, then creating an ROI for a service team if needed to allow for shared planning and service provision. - Clients get concerned when they sign for multiple releases for providers. I have been asked by the clients 18 or older to separate them as they don't want the access to the family and the schools and one had a probation officer. In the end me and my colleagues are still doing individual ROI's for the protection of privacy for the client. - It hasn't made any difference in more efficient collection of records. - It's often confused providers more than previous forms, esp medical. Three medical organization's will often send them back as not valid in meeting their HIPPA guidelines. - The form is difficult to read and review. Due to privacy concerns, clients do not want multiple entities or individuals on a single form. The form is TOO LONG and if the client has multiple medical providers, it is unwieldy. We need something more simplified for requesting medical records. Clients have expressed dislike of the lengthy complicated form - The way it is written allows for too much "behind the scenes" sharing of information without the initiating agency to be aware of such sharing. I believe it would be a lot more effective to have it so there was not sharing among the agencies, schools, etc. that were not the originators of the ROI. Each Agency and School should have a signed release from them to all the agencies, schools, providers on one form, but not allow any of the additional agencies, schools, providers to share information among themselves without their own ROI. Hope that makes sense.
Revision Concerns	- The ROI is a required form to be able to request & receive records and/or coordinate services with other providers. It is revised too often, we are not notified of revisions in a timely manner, and the form is not user friendly at all. Because of this, errors are made, releases are rejected by providers, and service is delayed due to lack of requested records being provided until the release is approved by the receiving facility. It is not useful for requesting from multiple providers, either. - It would be easier to work with if it was simplified, on a more basic reading level, and if we were notified of revisions with enough time to clear out the old & replace with the new within our branch. - I think the special information section needs to be clearer - I find clients forget to initial the alcohol & drug line. Perhaps it could be modified to have 2 lines or a larger font for the alcohol & drug line. I would also like to see an "auto-fill" feature for "date of records" so that whatever the VRC puts in

	the "From" section auto-fills in the "To" section (I often find discrepancies between the two sections!). - I think it would be helpful to make the layout in a way where you have a front page with the client's information, the second page could be the provider information to be filled in with the ability to add on additional pages for additional providers, then the third page could be the signature page. This way, you can pull out the first, one of the middle, and the last page so you can send the release to providers without letting the providers know about each other. - Note the signatures at the bottom of them, don't accommodate youth as there is no place for a guardian to sign or to indicate their â€˜relationship to the individuals. This needs to be revised. All previous ROI's had this signature line as it is required in HIPPA qualifications. (I know we aren't under HIPPA anymore, but this is still a legal point that needs to be addressed and updated in this form). - Revising it for it's user's needs, agency needs and the client's rights to privacy.
Neutral	- Allow communication between multiple parties - I haven't seen it yet. - I use it regularly, however, I predominantly do ROI's in order to gather medical/psychological records so only 1 provider can be listed on ROI (1 ROI to school for records, 1 ROI to CDDP for gathering records). I typically don't use the multiple agency shared info feature due to this. - N/A - This ROI has been just like the last ROI. This is probably because when I am filling out ROI's I am not near a computer most of the times, so I am handwriting in. So it is a lot like the last ROI. I there was a neutral instead of an agree or disagree that would have been my answer for most questions on this survey. - We have only used it a couple of times so far and sometimes still need multiple releases - We send them out to providers and have them on file.
Helpful	- Being able to provide one release instead of multiple ROI's to clients and their advocates has been greatly received within our agency. - I am unable to serve clients unless I have medical records and information to make them eligible. The ROI gives me the ability to attain that information. Also, if I have a client that works with multiple agencies and has a hard time signing documents, this helps narrow down the ROI to one signature. - It is helpful to have every agency on one form. - The instructions at the end of the Release on how to complete it is helpful. - The 3010 has opened up interagency opportunities that are truly refreshing.
Simplified	- Has made it easier for the client to sign one release. - Having permission to exchange information with agencies and individuals on one document simplifies the entire process, from VR application to employment.

	- I find the new ROI easier to read and to fill out than the previous version (primarily, I like that the release "From" section is first one the form). - It has been easier to gather information from multiple agencies at one time. - It is nice to have a form that is universal - It is nice to only have one release across all DD agencies, VR and school districts. I also like that it doesn't require an initial next to each agency. - It is one form, less complications. Less paper work. - Its just nice to have a form that all agencies are supposed to be using, so everything is clear and not a bunch of different forms. - Less paperwork - Reduced burden on families and clients in completing multiple release forms for members on the team. - The 3010 has streamlined communication and transfer of eligibility documents to Vocational Rehabilitation. - Redesign. Simplification.
Time Efficient	- It has decreased the amount of releases needed for inter-agency coordination. - It has helped us gain medical information for eligibility in a timely manner and gain mutual information exchange between VRC's and facilities. - It takes less time to make a referral IF the agency or service provider is already on the ROI - Saves time & able to make clear the info we need - The condensed ROI helps me better serve customers by reducing time I would otherwise spend on administrative, non-billable tasks. Meaning, I have more time to provide services to customers. - The statewide ROI has increased our ability to meet the needs of our clients in a timely manner. - when used it has helped to streamline service delivery/collaboration

Question 2: What additional information or training is needed to address challenges or barriers for using the Statewide ROI (e.g.., more training, specific questions that need to be addressed, etc.)?

Theme	Response
Refresher	- After COVID-19, or during, a refresher ROI training would be of benefit. - it's new...anything new takes time...and reminders... - Refresher training. and easier Website access on VR and ODE - not having to search extensively for it
More Overall Guidance	- Many agencies we work with do not always have one specific point person, this form requires a point person rather than allowing a whole agency permission. Also, especially since we are not able to explain the form face to face with clients, it is overwhelming and hard for them to understand/read. I also feel it is really important to put out a workers guide for Case Managers to check to ensure they are putting the correct information. - Many clients/participants do not understand the form independently. They need help knowing what they are signing. - More Training - More training. - Would be beneficial to attend a hands-on lab to practice filling the form.

	- The form is extremely confusing and difficult to use - in my opinion. The training we received was opposite from the instructional video. - It doesn't seem like everyone involved knows how to use them. It would be helpful to have an easy to access training for them. - Better training would be beneficial. More clear guidance as to who is responsible for creating and managing the form
Department /Agency Specific	- Even after having client fill out 3010, partner agencies like County DD want the client to fill out their ROI. But their ROI is the SAME as my ROI. Train DD. - I think if the form is geared toward DHS use and not other entities. - I would revamp the form completely, making it more relevant to brokerage use. - Non-profit agency is where I work, brokerage services. This was the first time, I ever used the ROI. The training I attended from State was geared towards staff that had previously used ROI form in later version thus, it was not a comprehensive training for new users like myself and sort of picked up from last version of form to new form. If I may suggest a training for personal agents/SC geared vs. training geared towards state employees or Voc employees that have previous experience with it. - There needs to be clearer communication/training about how to label for different entities - I feel more trainings across agencies and WIOA partners is needed so that everyone knows how to use this form.
Section/Feature Specific	- How to combine multiple ROIs into one ROI. I often have my customers sign a few different ones based on different categories (general communication vs provider agencies that might include documents vs medical providers, etc.). It would be nice for them to only have to sign one ROI. - How to use the fill in features
No Feedback	- I can't think of any specific area of training that would be helpful. - I don't have any concerns at this time. - N/A - N/A - None - None - None

Appendix B – Goal 2: Comments from Open Ended Question

Question: In the space below provide any other comments you think are important for the event planners and presenters to know.

Unless otherwise note, all comments are verbatim.

Thank you

1. Thanks!
2. Thank you!
3. Thank you!
4. Thank you!
5. Thank you!
6. Thank you!
7. Thank you for the info!
8. Very good training, guys!
9. Always welcoming more training! Thank you!
10. Excellent training, well presented. Thank you!
11. Excellent, engaging presentation of a dry subject. Thank you!!
12. I found the training to be informative and helpful. Thank you!
13. Thank you! I very much appreciate having training's focused on collaboration!
14. Thank you Cindy, for keeping us on time and task. I appreciate you treating us like professionals! Melanie, Cindy, Teddy - thanks for sharing your knowledge and wisdom
15. Thank you so much for getting adult/young adult service providers together. It's always great to get to network and chat with others in the field. This is important info for high school SPED teachers who need to be providing transition services, would be good to get this info to them.

Positive Comments/Expression of Benefit

Content

1. Helpful info, and especially helpful to have so many and such a variety of service providers in one room.
2. The group activity of deciding how to write goals for someone in one of the scenarios was more helpful than the rest of the training, by far, because it caused people from different organizations to share knowledge with each other about their processes, resources and procedures.
3. Similar and different between agencies. I really appreciated the acronym cheat sheet and being at a table with other agencies. Presenters provided time to plan and look at each other's paperwork. I left with a plan to streamline our information to others in a more user friendly format. I was excited to share with my teaching partner that she missed a good one. Will sign up again if offered.
4. There was a lot of information that was useful
5. Great presentation and momentum of contents.
6. Pre-ETs and IEP information would be very helpful for service providers to be able to provide appropriate supports.
7. what was working/not working great was a good activity!
8. The 'its not about the nail video"" was funny but if the garden roles were switched it would be much better.
9. I would welcome more information on budget allocation if all agencies in terms of what goes to clients directly.
10. The word bingo reference was hilarious, kept us light and the pressure as human/ approachable

Collaboration/ Teaming

1. This is a great opportunity to be with Com team to get together.

2. The meeting between the different players (VR, School, Providers) was a great benefit.
3. I thought it was nice having all of the members of a team present at the training, Josh helped me understand education much more. Also, the smart goal examples were challenging and brought out multiple ideas and cause the team to work together.
4. It was helpful to have the different agencies represented and their services explained. I appreciated my discussion with Lindsey from VR. Thank you!
5. The 15 minutes in the beginning to meet others at the table and discuss why we do the work we do was very valuable and connective!

Presenters

1. Brad, Erica and Josh did a great job!
2. Eric, Micah, and Brad were great presenters that delivered the information in a way that is applicable to every aspect of my job, A+
3. Brad Collins is a great presenter and he gives everyone the opportunity to participate. Micah was awesome as well!
4. Presenters were organized and concise about things. Appreciate current and clarification on stabilization (90 days)
5. Presenters were knowledgeable, friendly, and interactive. I liked the videos and interactive activities
6. I thought the presenters did an excellent job!
7. Presenters were great and knowledgeable.

General training

1. Excellent Training!
2. One of the best workshops I have attended in a while. Excellent balance between speaking, activities, breaks, socialization, etc.
3. This was a great training to have cross-agency conversations & understand other systems. Would be great to have again!
4. This training was more helpful this year. Having VR and the school explain the VR process and IEP's was super helpful.
5. This is a useful training for people new to the field - I didn't find a lot of new or useful info having been in this job for quite some time.
6. Beneficial for people who work for consumers 12-21. 2nd half more helpful to clients that are over 21.

Not helpful/Not Beneficial

Agency conflicts

1. Presentation of VR was not beneficial. Communication between agencies is lacking. We are all busy, not an excuse for VR. Intakes don't happen for a month and no follow up for several months
2. VR monopolized the meeting and was not completely honest
3. Maybe try to have negative conversations moved to another day or location. The VR conversation was kind of uncomfortable.
4. Too much time spent on personal conflict between agencies rather than useful information for the group.
5. I thought this training would help me understand the different services and how they are beneficial to my students. I think this training was more about hashing out differences within agencies and not for school personnel.

Content

1. VR services continued to be a largely a mystery (?) to me.

2. Very basic info for someone familiar with the process. Would like more in-depth info on specific areas.
3. It would have been helpful to know more information about VR, IPE and their timeliness.
4. Nice overview. It would be great to have a training that goes more in-depth about employment.
5. New info would have been helpful - only thing new was pre-transition services - which was not clear.
6. There wasn't too much new information in this training. If I was a new PA/SC it would have been a lot more helpful.
7. A fair amount of the information was redundant.
8. Still at the very beginning of my own learning around job development. Felt like most of the learning and discussion was geared toward the many people with lots of experience. While I still have yet to gather my 1st experiences with job development/coaching.
9. I am extremely new to this position of PA (2 months in), so I am still learning and getting a grasp on the DD world and services provided.

Advice/Consideration for Future Trainings

Additional trainings

1. More regular; quarterly meetings
2. Hope this happens again more frequently and at a closer destination (3 hours, 3-4 times per school year would be ideal).

Audiences

1. I think special education staff from local small schools would benefit from this training. Reaching out to them personally might get them here.
2. Promote to LS HS teachers/transition programs.

Content

1. It would be helpful to know more about other agencies' processes/timelines/and requirements as it relates to my job and my overall support/guidance for the individuals and supports. More of these please!
2. The information presented was consistent with what DD knows and does, but I feel like more school information would be useful - maybe a teacher to present how they go from start to finish with a student starting a transition plan to graduating from it.
3. A timeline of expectations, a graph showing the progression from 14 years to employed and showing what overlaps.
4. Get more information on pre-ETS as well.
5. More collaboration in Emp. Path --> SMART goals around those and actual time limits.
6. SMART goal activity is valuable, but group activities are difficult when it is loud. Offer for individuals to do it on their own if they want.
7. While the discussions were valuable and some good ideas were discussed, there was way too much conversation about frustrations and not enough time devoted to information (slides) and SMART goals. I was looking to learn more about IEP and transition services (YTP) since that is the area I am least knowledgeable in. I got very little info on that area. Conversation was dominated by VR. Eivind did not get enough time.
8. Some info shared was inconsistent with rules, laws, and policies. Please vet before next presentation.
9. It would have been nice to observe how the IEP, IPE, ISP blend supporting each other

Meeting structure

1. Format of presentations were very monotonous - Too much information to absorb in this style. More diverse presentation techniques would be very helpful.
2. Integrate video into presentation rather than putting it at the end.
3. There needed to be more interaction and less lecturing and speeches about issues too focused to only a few people in the room. They spent ages doing this while everyone else waited for lunch.

Materials

1. It was hard for all of us to work off of a copy of a document for the exercises. They weren't very useful.
2. Copies of the slideshows for those that use them as a way to learn
3. Please ensure all videos are captioned.
4. need speakers for videos.

Miscellaneous

Time

1. Perhaps an 8am-12pm would be easier to allow for 1/2 work day
2. Do not do this on a Friday - lost a lot of folks @ lunch time Friday. A person has weekend on the mind. Thursday's best. Time of training was off by an hour (it said 10-2 mt) so need to get clarification on time of training
3. Time was good

Logistics – meeting space, food

1. Snacks and coffee
2. I was accidentally dropped from I-learn after registration and registered again. I really missed the country SC's after lunch.
3. Kind of a long survey.
4. Too hot in the room
5. Bathroom in building where training was held are not disability accessible - ironic, given the focus of today's training
6. location was extremely noisy due to childcare program in the room next door - was rather distracting.
7. A location with free parking would be great!
8. Parking would have been nice, other than that it was a good location!

Apology

1. Sorry I got overly excited

Appendix C: Goal 2

Table 2.3. Sites with 10% or more of the respondents indicating the intended outcomes were not achieved

	Training Sites								
Intended Outcome	Benton	Coos Co.	Klamath	Lane	Linn Co.	Marion-Polk	Multnomah	NW Regional ESD	Yamhill
I understand the **role of the educators** in providing transition services to students.		x							
I understand **ODDS services** available for transition-aged youth.		x	x		x	x			
I understand the **VR services** available for transition-aged youth.		x	x		x	x	x		x
I can **use this information** immediately in providing transition services to students.	x			x	x	x			
I understand each of the **agencies' plans** and how they can support one another.		x			x	x		x	