12TH ANNUAL SUMMIT ON PERFORMANCE MANAGEMENT EXCELLENCE
in beautiful Portland, Maine
September 4th - 6th, 2019 • Holiday Inn Portland - By the Bay

Summit Conference 2019: Presentations and Roundtables

What Are Your Top Session Picks?

Let us know what you're most interested in! This will help us choose appropriate room sizes for your preferred sessions.

When registering, you'll be asked to let us know your top session picks:

- Top 3: 75-minute Presentations
- Top 2: 60-minute Presentations
- Top 2: 60-minute Roundtable Discussions

Thank you for helping us make this your best conference experience!

60-Minute Sessions

1. **WIOA Performance Management Dashboards: Putting the Power in Power BI**

   Margaret Alewine, South Carolina Vocational Rehabilitation
   This presentation will describe development of a business intelligence project by South Carolina Vocational Rehabilitation Department. The change to the WIOA Common Performance Measures is large and complex. It requires new tools to collect this data. Learn about the use of Power BI to help with building data models and effective visualizations. Review development of new reports using data elements to manage organizational change, validate and correct data issues, and develop effective training on WIOA performance. Efforts in managing the change to new performance standards will be discussed from data reporting, training, and organizational change perspectives.

2. **Evolution of Pre-Employment Transition Services and Internal Control in West Virginia** *Pisnu Bua-Iam, Doug Snuffer, Joseph "Zeke" Hampton, Basil White, Jr., WVDRS*
   Expand your knowledge of successful Pre-ETS practices based on examples from West Virginia. Learn the basics of RSA and GAO internal control principals and guidelines. Identify how to apply the internal control principals to innovative Pre-ETS activities through fiscal and programmatic data (to set goals and objectives). Learn ways to connect available Pre-ETS resources with desired outcomes.

3. **Assessing Future Needs for Students with Disabilities Utilizing State Department of Education Data and Mapping Techniques**
   Barbara Burkett, Virginia Department for Aging and Rehabilitative Services
   Explore the use of external data sources to anticipate need for services by the use of the EPI- Info for mapping. Compare current service delivery locations to anticipated service locations. Make better plans for changes in prevalence of disabilities among clients and consider mapping as a tool in future needs assessments. Review regulations and limitations of education data as it pertains to the Family Educational Rights and Privacy Act.

4. **Progressive Employment: Transporting from Vermont and Testing in Nebraska, Maine, and Oregon**
   Susan Foley, Institute for Community Inclusion, UMass Boston; Kelly Haines, ICI/UMass Boston; Dennis Moore, Professor Emeritus at Wright State and ICI/UMass Boston
   This presentation will describe how a public university partnered with program evaluators and other personnel responsible for case management systems. Explore how quality assurance is linked through the study of Progressive Employment to the use of administrative data collection and analysis. Gain a full understanding of the state of the art in the research, transition, and development of an emerging practice that is demonstrating impact in multiple states. This presentation will provide the information to assess whether or not Progressive Employment could be implemented in your state VR agency, including strategies for vendor activity into evaluations of employment innovation.

5. **Rethinking IPE Development – A Case Study in Systems Change in a VR Agency**
   Betsy Hopkins, WINTAC; Libby Stone-Sterling, ME Division of Vocational Rehabilitation
   This presentation is about Maine's struggle in developing VR plans within 90 Days. Current and former directors will reflect on this process and will talk about the resulting outcomes for clients, VR counselors, and staying within VR compliance. Strategies and tools that have resulted in a current statewide average of 66 days from eligibility to signed IPE will be shared. Learn how to identify three barriers faced by VR agencies, and how to access the tools used by Maine DVR to create and sustain IPE development.

6. **Working with Schools: Improving Employment Outcomes for Youth**
   Teresa Grossi, Indiana Institute On Disability and Community, Indiana University
   Transition from school-to-work, including into the adult service systems can be daunting for the student, families and school personnel. The passage of the Workforce Investment and Opportunity Act 2014 (WIOA) allows for creative opportunities to work with schools on offering pre-employment transition services. This session will share the results of a School-to-Work Collaborative that embedded employment resources within the school from the adult services

providers. How collaboration, roles and responsibilities between schools, Vocational Rehabilitation, community employment providers enhanced agency connections, work experiences and employment outcomes will be shared. Participants will identify strategies to work effectively with schools and ultimately improve employment outcomes for youth within your local community. Understanding the school's culture, expectations and ways to enhance collaboration will be explored and the challenges and solutions developed by the local Collaboratives.

7. **Reaching the Promise of Pre-ETS: VR and Special Education**
   Roberta Lucas, ME Dept. of Education; Libby Stone-Sterling, Director, Division of Vocational Rehabilitation; Emily Brinck, University of Maine-Farmington
   Explore the interagency collaboration between Maine's Department of Education-Special Services and the Division of Vocational Rehabilitation. The establishment of Pre-ETS changed the relationship between state VR agencies and their state and local education partners in this research. Learn about what the special educators and VR counselors gained from WIOA-Pre-ETS and the relationship between the interagency collaboration. The use of data sharing to support and promote partnerships will be highlighted.

8. **Understanding Pre-ETS Populations: What to Ask and What to Know**
   Mark Noyes, Brian Robertson, Market Decisions
   This presentation will explore potential barriers to gathering evaluation data from youth populations. As Pre-ETS populations become a larger customer base for services provided by VR agencies, the need to understand and evaluate services provided is becoming more critical. Learn more about the potential barriers to gathering evaluation data, what agencies need to know from Pre-ETS consumers, and how agencies can best collect this data in order to better execute quality assurance and performance evaluation.

9. **Application of the Adjusted Model in the VR Program**
   Speaker agency: Statistician, Data Collections and Analysis Unit, Rehabilitation Services Administration.
   A brief explanation of the Statistical Adjustment Model (SAM) will be shared. Since Workforce Innovation and Opportunity Act (WIOA) requires the use of a statistical adjustment model for setting targets for the core performance indicators. RSA will have the first performance indicator, MSG, target setting in early 2020. Dr. Shieh will demonstrate the steps that RSA works through on SAM to estimate their Measurable Skills Gains based on 911 data.

10. **Longitudinal Exploration of Factors Associated with Work Experiences of Young SSI Recipients**
    Mark Tucker, San Diego State University; Mari Guillermo, Interwork Institute; Vanessa Corona, Interwork Institute
    As VR agencies operate under WIOA, many are serving more youth with disabilities, providing more intensive services, and providing a wider array of services. This presentation will share the results of a longitudinal investigation of factors associated with work-participation expectations of young SSI recipients between the ages of 14 and 16 when the six-year study ended. Learn of the individual, familial, and service provision characteristics associated with work expectations measured at program intake and exit, along with implications for service providers and performance management professionals.

11. **The Diversity Partners Project at Cornell**
Wendy Strobel-Gower, K. Lisa Yang and Hock E. Tan, Institute on Employment and Disability, ILR School, Cornell University
Job Developers, Employment Specialists, Workforce Development staff and others in both the public and private sector who connect people with disabilities to jobs are the "bridge" between labor supply and demand. In order to serve as an effective bridge, these professionals must form partnerships with employers. A partnership is an arrangement where parties agree to cooperate to advance mutual interests. Ideally, the approach to employers shouldn't just be about making a single placement, it should also be about understanding and meeting the needs of the employer in order to establish long-term partnership. Diversity Partners is a combination of both facilitated training and consultation, and online learning modules, that can help professionals find better employment opportunities for people with disabilities through improved business relationships. Diversity Partners: http://buildingdiversitypartners.org

75-Minute Sessions

1. **Early Employment Outcomes and Engagement of Transition-Age SSI Youth Receiving PROMISE Services**
Cayte Anderson, University of Wisconsin-Madison/SVRI PI; Amanda Schlegelmilch, Stout Vocational Rehabilitation Institute; Emily Brinck, University of Maine-Farmington; Kelli Crane, University of Maryland; Jade Gingerich, Director, Maryland Department of Disabilities Employment Policy
This presentation will provide an overview of Promoting the Readiness of Minors in Supplemental Security Income (PROMISE), a large-scale experimental demonstration project conducted in six sites across the country including VR partners. Presenters will share interventions to move youth toward work-experiences and paid employment, and how they connected youth to VR services, including Pre-ETS. Gain a better understanding of the employment service and support needs of low-income individuals with disabilities in VR and discuss how serving the SSI population aligns with the WIOA and Order of Selection.

2. **National Employment Team Members: Supporting Vocational Rehabilitation's Outreach to Businesses**
Kathleen M. Murphy, KTER Center
This presentation will summarize results from the KTER Center's research with members of the Council on State Administrators on Vocational Rehabilitation's National Employment Team (the "NET"). KTER conducted a training needs assessment and scoping review on studies of efforts vocational rehabilitation has made to reach out to business. Their findings informed a training and follow-up support for NET members on how to function as knowledge brokers in their domains to raise awareness among other staff and employers about how vocational rehabilitation can support the needs of business.

3. **Best Practices in the Development and Implementation of Vocational Rehabilitation Internal Control Processes**
Rachel Anderson, WINTAC; Betsy Hopkins, WINTAC; Matthew Markve, Idaho VR; Teresa Pitt, Idaho VR
State VR agencies need to develop Internal Controls as they move forward with developing new Policies and Procedures related to WIOA implementation. VR agency staff can explore a possible framework to use for developing their own internal control documents. Learn about risk assessments, monitoring and auditing issues, case review instruments and quality assurance activities, data validation and integrity, and case management system controls.

4. **Tapping the Wisdom and Rich Experiences of VR Stakeholders through Collaborative Data Review**
Xinsheng "Cindy" Cai, American Institutes for Research; Kirsten Rowe, Virginia Department for Aging and Rehabilitative Services; Cora McNabb, Kentucky Office of Vocational Rehabilitation; Helga Gilbert, Kentucky Office of Vocational Rehabilitation, Division of Blind Services; Deborah Collard, VA Dept. for the Blind and Vision Impaired
Evaluation experts from American Institutes for Research (AIR) have developed and implemented a Collaborative Data Review and Action Planning process to engage VR Stakeholders in the analysis and reporting of evaluation data. This presentation will provide information about the innovative approach and how it can benefit state agencies. Learn about the tools AIR evaluators have developed, and how this process has helped Kentucky and Virginia in analyzing, reporting and using evaluation data to improve program implementation, including successful lessons learned.

5. **Innovation and Evaluation in Vocational Rehabilitation and Employment Programs**
Noelle Denny-Brown, Mathematica; Todd Honeycutt, Mathematica; Purvi Sevak, Mathematica
This session will include three presentations on innovations to help agencies evaluate programs and practices. First is a discussion about an approach to evaluate existing employment programs using comparison groups. Second, an approach for extracting information from case files that could be used for performance management or evaluation will be examined. Third, a grass-roots process for agencies to identify programs that need improvement will be shared. Learn about specific, novel approaches to identify, measure, and evaluate services and programs.

6. **The Vocational Rehabilitation Return on Investment Project: Employment Research and Knowledge Translation**
Rick Sizemore, Wilson Workforce and Rehabilitation Center; Bob Schmidt, University of Richmond; Joe Ashley, Ashley Consulting, LLC; Kirsten Rowe, Virginia Department for Aging and Rehabilitative Services; Rob Froehlich, The George Washington University
The VR ROI Project's methodologically rigorous model is used to determine the employment impacts and return on investment of the VR Program. This session describes how a multi-layer knowledge translation plan is an essential component in order to facilitate effective application of research findings to practice. The researcher/practitioner interface, facilitation of stakeholder feedback, and experiences pertaining to all these topics will be discussed. Time will be reserved for a question and answer period.

7. **Knowledge Brokering in Vocational Rehabilitation Agency Contexts**
Kathleen M. Murphy, KTER Center
This presentation summarizes results from the KTER Center's intervention study of knowledge brokering in vocational rehabilitation agencies. KTER trained staff who supervised at least 4 VR counselors—and so were in a position to act as knowledge brokers—in either pre-employment transition services or the employment of adults with autism. KTER staff followed the knowledge brokers for 6 months. They collected survey data from study participants, their staff, and a control group of supervisors and their staff to measure impact on changes in attitudes toward and use of research on-the-job.

8. **Using Knowledge Translation Models in Disability Employment Research**
Ann Outlaw, KTER Center
Participants will learn concepts underpinning knowledge translation to move conceptual discoveries from scientific research into practice by improving the relevance and application of research. Following an introduction to the Knowledge-to-Action framework (Graham et al., 2006), participants will practice applying this framework to developing knowledge translation activities appropriate for the vocational rehabilitation context.

9. **Pathway to Employment: Preliminary Findings from Promising VR Interventions**
Kirsten Rowe, Virginia Department for Aging and Rehabilitative Services; Michelle Yin, American Institutes for Research; Xinsheng "Cindy" Cai, American Institutes for Research; Garima Siwach, American Institutes for Research; Aditi Pathak, American Institutes for Research
This presentation will highlight early findings of the Career Pathways for Individual with Disabilities (CPID) model in Kentucky, Maine, and Virginia, and the Transition Work-Based Learning (TWBL) model in Maine. The focus will be on implementation strategies and challenges, and the role of CPID and TWBL models in employment outcomes including employment status, types of employment, and wages. Learn about how the two models worked through the strategies and challenges using the individual level RSA 911 data, unemployment insurance data, and primary data from implementation and monitoring to improve employment outcomes.

10. **Five- and Ten-Year Return on Investment Estimates for VR Services in Three States**
Bob Schmidt, University of Richmond; Joe Ashley, Ashley Consulting, LLC; Kirsten Rowe, Virginia Department for Aging and Rehabilitative Services; Steven Stern, State University of New York at Stony Brook
Increase your knowledge of methodologically rigorous and scientifically sound methods for examining the impact of VR on long-term employment outcomes and estimating the ROI of state VR programs. Learn about the value of examining the impacts of up to nine specific types of VR services and four specific disabling conditions. This approach explicitly recognizes VR as an individualized program through which different VR participants receive different kinds of VR services. Learn about results of recent analyses of data from Maryland, Oklahoma and Virginia for individuals who applied for VR services during 2007.

11. **Implementing WIOA – A Systems Approach and Overview**
Kurt Sprenger, Wilson Workforce and Rehabilitation Center (Virginia); Rick Sizemore, Wilson Workforce and Rehabilitation Center (Virginia); Jessica Stehle, Virginia Department for Aging and Rehabilitative Services; Sandy Williams, Department for Aging and Rehabilitative Services
How can a VR Training Center promote WIOA outcomes using a case management system? Pursue best paths to effectively document and report data, and to educate the community about benefits of VR. Join the discussion about promotion of implementation of services and approaches.

12. **Who Do we Serve? VR Client Profiles**
Libby Stone-Sterling, ME Division of Vocational Rehabilitation; Michelle Yin, American Institutes for Research; Xinsheng "Cindy" Cai, American Institutes for Research; Garima Siwach, American Institutes for Research; Aditi Pathak, American Institutes for Research
VR agencies serve individuals with disabilities to prepare for, obtain, maintain, or regain employment. This presentation will describe how VR client characteristics and the services received varied via analysis of RSA 911 data. Learn how the analyzed services varied by characteristics. Insights about changes in VR applicant and participant characteristics will be provided in discussion with Kentucky, Maine, and Virginia staff about the demographic characteristics, disability characteristics, and barriers to employment.

13. **Measuring Fidelity of Four State Models for Expanding Work-Based Learning and Transition Opportunities**
Richard Tulikangas, Vermont Linking Learning to Careers; Libby Stone-Sterling, Maine Division of Vocational Rehabilitation; Susan M. Foley, Institute for Community Inclusion; Ellen Fabian, University of Maryland
Gain information about each state's unique design elements related to common overall objectives for improving employment and post-secondary career pathway outcomes. Learn about different, innovative approaches to a range of work-based training experiences and related career and college readiness activities for high school students with disabilities. A panel discussion with the four states – Maine, Maryland, Massachusetts, and Vermont – will describe their projects. An overview of specific work-based training and implementation approaches, strategies for monitoring the fidelity of their models, and evaluation results to date at the midpoint of their projects are included.

60-Minute Roundtables

1. **WIOA Performance Management Dashboards: Putting the Power in Power BI**
Margaret Alewine, South Carolina Vocational Rehabilitation
Follow-up to conference presentation on the development of a data warehouse, WIOA performance reports, and a Key Performance Indicators (KPI) dashboard will be reviewed and demonstrated. Through the use of Power BI software, access to timely performance data with data visualizations and drill down capabilities can be provided to staff. Other elements from the presentation will be included as time permits: development of reports for the WIOA common performance measures, descriptions of data validation efforts, and training issues identified in reporting.

2. **Tapping the Wisdom and Rich Experiences of VR Stakeholders through Collaborative Data Review**
   Xinsheng "Cindy" Cai, American Institutes for Research; Kirsten Rowe, Virginia Department for Aging and Rehabilitative Services; Cora McNabb, Kentucky Office of Vocational Rehabilitation; Helga Gilbert, Kentucky Office of Vocational Rehabilitation, Director, Division of Blind Services; Deborah Collard, VA Dept. for the Blind and Vision Impaired
   In this roundtable session related to their conference presentation, the presenters and audience will hold interactive conversations on the benefits and best practices of engaging VR stakeholders in evaluation data collection, analysis and reporting. In addition, shared strategies and tools on how to use evaluation data to identify challenges and develop action plans to address those challenges will be discussed.

3. **Progressive Employment: Transporting from Vermont and Testing in Nebraska, Maine and Oregon**
   Susan Foley, Institute for Community Inclusion, UMass Boston; Kelly Haines, ICI/UMass Boston; Dennis Moore, Professor Emeritus at Wright State and ICI/UMass Boston
   Discuss specific strategies or next steps for considering adopting Progressive Employment in your state. Facilitators will provide direct state specific information about operational, financial, fidelity, workforce, and business relations processes that are part of the infrastructure for Progressive Employment implementation.

4. **Use of Texting for Improved Outcomes**
   Jennifer Gundlach-Klatt, PEQA-TAC and Stout Vocational Rehabilitation Institute; Terry Donovan, PEQA-TAC and Stout Vocational Rehabilitation Institute
   This Roundtable session will present statistics on the rise and use of texting as a method of communication, engagement, and motivation. A brief discussion of the principles of behavioral psychology as it relates to use of texting. Examples will be given of how texting has been used in the public sector and specifically how SVRI uses texting to encourage and motivate individuals to finish courses, finish classes, stay motivated, and present timely information.

5. **Pre-employment Transition Services: Service Provision, Partnerships, and Monitoring**
   Todd Honeycutt, Mathematica
   Roundtable attendees will discuss successes and challenges with three aspects of pre-employment transition services: (1) service provision; (2) partnerships between vocational rehabilitation agencies, schools, community rehabilitation providers, and other organizations; and (3) monitoring and reporting.

7. **Knowledge Brokering – Where Should the Field Go Next?**
   Kathleen M. Murphy, Joann Starks, KTER Center
   Reaction Reaction/discussion session to previous KTER presentation on knowledge brokering and discussion of ideas about challenges and proposed solutions to engaging in KT in VR agency contexts.

8. **Understanding Pre-ETS Populations: What to Ask and What to Know**
   Mark Noyes, MPH; Brian Robertson, PhD, Market Decisions
   This Roundtable is a follow-up to the conference presentation and will continue the discussion of the challenges in interviewing younger consumers of VR services in a quantitative fashion. Topics will include new methods of communication, lack of awareness of VR as a service provider, and changing norms of behavior around communication. With this knowledge, attendees will help each other to share experiences and potential techniques to overcome these challenges.

9. **Knowledge Translation – Where Should the Field Go Next?**
   Ann Outlaw, Joann Starks, KTER Center
   Reaction/discussion session to the previous KTER session on Knowledge Translation and its application in VR contexts.

10. **Measuring Performance in The Future (Not Too Distant)**
    Steve Wooderson, CSAVR; Betsy Hopkins, WINTAC; Terry Donovan, PEQA-TAC
    A discussion of the data needs and performance metrics as VR programs head into the next five years. What are the underlying data needs for Vision 2020 to measure its impact? How will the field identify and highlight service improvements while under Order of Selection? What is the story VR should be thinking about telling five years from now in effort to support the ongoing growth of the field?