ASPIRE

Achieving Success by Promoting Readiness
for Education and Employment
A PROMISE Initiative

Chapter 4
ASPIRE Training Program

December 1, 2019

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This chapter of the ASPIRE final report is specific to the ASPIRE Training Program. Chapter 1 describes a complete summary of ASPIRE formation, implementation, evaluation and conclusion. Chapter 2 describes the unique characteristics and challenges of a consortium of states implementing a federal Model Demonstration Project. Chapter 3 describes ASPIRE's implementation of the ABLE deposit opportunity. Chapter 5 summarizes the findings of ASPIRE's Formative Evaluation Team. Utilizing the lessons learned and development of best practices, ASPIRE's recommendations are in Chapter 6.

This Chapter 4, the ASPIRE Training Program report describes ASPIRE's comprehensive training program to ensure fidelity of the PROMISE research study, from inception to implementation to evaluation.

The ASPIRE Training Program: A Summary Review

The ASPIRE Training Program was a dynamic system that changed and adapted as the ASPIRE project progressed. The program was developed by the ASPIRE Trainers and the Project Director, with early input and feedback from the ASPIRE Project Leadership team (APL), Formative Evaluation team, and Site Coordinators.

Focusing on providing high-quality, structured training in a complex, and often less structured environment, the training program utilized many different theories, techniques, and practices to engage ASPIRE staff and assist with implementing the research study. This summary looks at the direction, content, efficacy, and challenges of the training program.

Part A: Training Phases

The ASPIRE training program was multi-faceted, covering many different project areas. It evolved over the course of the project with different areas of emphasis along the way. Consequently, the training program can be summarized into five general phases. Although these phases were not formalized, and some overlap occurred between them, the five phases provide an overview of the direction and focus of training components at given points in the study.

Phase I (2014)

The first phase was centered around forming the foundation for the project through procedure development and laying the groundwork for recruitment and enrollment by promoting the study to the community.

Work groups. During Phase I, the ASPIRE work groups were formed. These work groups included: Management, Project Operations, Youth Interventions, Parent Interventions, Community Interventions, Case Management, and Recruitment & Enrollment. An ASPIRE

Trainer was present during each work group meeting, and in addition to participating in work group tasks, this attendance allowed the trainers to gain insight into future training needs.

ASPIRE procedures. ASPIRE procedures were a primary focus of Phase I. Developing ASPIRE procedures was a group effort, with input from ASPIRE staff hired at the beginning of the project. This included several Site Coordinators, some Case Managers, the Formative Evaluation Team, and APL. Work Groups provided input on specific areas, and weekly Management meetings helped solidify the procedures, which were then formalized into the ASPIRE procedure manual.

Promotion. Plans and materials for promoting the research study were devised during Phase I. The training program assisted with these tasks in a variety of ways. For example, a mock up promotion brochure was developed, using plain language. With feedback from ASPIRE staff, specific wording and layouts were fleshed out, and then provided to the contracted graphic arts company for creation of the final product. Other promotion materials developed by the trainers included a flyer, video, commercial, and radio spot ads. Each of these materials took the general promotion message and adapted it for a particular medium. Additionally, promotion instructions and procedures were developed to guide ASPIRE staff in conducting promotion events with community organizations, schools, and agencies. These procedures focused on training staff how to run promotion events with uniformity and consistency.

Orientation. Orienting ASPIRE staff and connected partners to the research study took place during Phase I. This included developing training modules outlining the history, purpose, and objectives of ASPIRE, as well as describing the hierarchy between federal partners, management, and sites, and the timeframes for the study.

Phase II (2014 – 2015)

Phase II emphasized recruitment of study participants, enrollment into the study, and continued efforts to promote ASPIRE with community partners, allied agencies, and others.

Site visits (kick-off). Prior to beginning recruitment efforts, each state received in-person training, via a “kick-off” site visit. These site visits, conducted by the Project Director, Principal Investigator, and Trainers, focused on several key items. For instance, all staff were trained to the ASPIRE procedure manual, with sessions scheduled to go over specific policies, as well as time to answer questions and provide clarification on processes. Additionally, staff were asked to role-play using recruitment scripts and practice the enrollment process from beginning to end, to ensure they understood the expectations and to promote fidelity within the project. During these site visits, the training team also met with the Site Coordinator to discuss specific challenges and concerns in their area, and devise strategies to address issues. Lastly, a focus group was held with Case Managers, Enrollment, and Support staff, to gauge culture and morale, better understand staff concerns, and promote communication.

Recruitment and enrollment. Recruiting and enrolling participants for the study was a major component of Phase II. Training during this time focused on ensuring that staff understood the processes from reaching out to potential participants, through enrollment and random assignment into the study. Training also aimed to gather effective strategies from those in the field performing recruitment and enrollment, to share with the other sites. Additionally, scripts for how to handle regular, unusual, and difficult situations were developed, and frequently asked questions were created to answer common questions. The Online Question Box was promoted at this time as well, as a way for ASPIRE staff to ask questions easily and anonymously.

Documentation. In Phase II, the ASPIRE Information Management System (AIMS) was developed, and training focused on teaching ASPIRE staff how to navigate through the system, documenting efforts related to promotion, recruitment, enrollment, and case management. During this phase, staff engaged in a measure of trial and error with documentation practices, and the training program adapted to match this process. Training worked to both strengthen existing data entry practices and incorporate suggestions and solutions to improve AIMS trouble areas.

Phase III (2016)

The majority of ASPIRE processes and practices were well established by Phase III. Thus, this period in ASPIRE centered around access to ASPIRE interventions and improving case management delivery and documentation.

Interventions. Phase III produced an increased focus on ASPIRE interventions. Training emphasized connecting intervention opportunities to specific aspects related to the family (e.g., goals, challenges). Alternative delivery methods for interventions were also introduced, in order to improve access and expand service provision.

Case management. Although a regular training emphasis in all phases of ASPIRE, Case Management as an intervention received additional focus in Phase III, with training related to utilizing Assessment, developing SMART goals and tasks, and interventions to connect the various pieces of ASPIRE and help families progress. Training also revisited documentation of case management efforts in AIMS, focusing on showing Case Managers, Site Coordinators, and Support Staff how to enter data to ensure their work with families was correctly captured in AIMS in accordance with ASPIRE procedure.

Phase IV (2017 – 2018)

Phase IV in ASPIRE was centered on improving existing practices and providing individualized feedback and direction. Efforts were also made to improve communication and understanding of program expectations. Additional training was introduced to continue advancing case management best practices. The phase ended with a focus on extending the project to close out successfully.

Case reviews.

Officially beginning in late 2016, Case Reviews received renewed focus and attention during Phase IV. In addition to conducting regular reviews for all ASPIRE Case Managers, the training program provided Site Coordinators with directions on how to complete reviews and instructed Case Managers on what to expect from reviews they receive. Reviews were individualized and emphasized both positive work and highlighted areas for improvement.

Site visits (monitoring).

During the first half of Phase IV (2017), APL completed Site Visits with each state. These visits allowed APL to meet with each site team, address areas of concern specific to their state, and emphasize training components to assist in improving adherence to ASPIRE procedure. These visits also allowed the Trainers to meet with each Case Manager individually, to discuss case reviews and other questions. Likewise, staff were afforded the opportunity to meet 1:1 with the Project Director, to discuss cases or concerns of their choosing, and receive additional instruction on complicated topics, such as Section 301.

New challenges and best practices.

As ASPIRE progressed and study participants aged and reached legal adulthood, new training challenges arose, including areas such as redetermination of SSI benefits and Section 301, guardianship and releases of information in adulthood, employment and benefits counseling, and the introduction of ABLE Accounts as part of the financial education and capability intervention.

No cost extension.

Nearing the end of Phase IV, ASPIRE's No Cost Extension was announced, and staff received information on the purpose and reason behind the extension, as well as instruction on what to expect from this new ASPIRE chapter - as a project, within their states, and in their individual roles.

Phase V (2018 – 2019)

Building off the requirements of the No Cost Extension, Phase V focused on ending ASPIRE in a deliberate, thoughtful, and positive manner. Training during this time focused on building new procedures to ensure a successful ending, and meeting with all ASPIRE staff to provide hands-on direction.

Audits.

One aspect of Phase V was to ensure data in AIMS reflected the work done in the project. Audits were introduced as a method to perform an in-depth inspection of AIMS files, examining specific areas, such as those related to ASPIRE performance measures. Staff received training on both conducting an audit and the procedures related to making audit corrections.

Closeout procedures. New procedures were developed related to closing out ASPIRE. These procedures included developing a final report for each ASPIRE family, using information obtained through case management and AIMS, and meeting with each family one final time before the end of the study. In order to make the process more manageable, closeout procedures were broken down into three parts, and staff received training on the overall plan for closeout as well as specific instruction related to completing each part of the closeout process.

Site visits (closeout). In Phase V, APL completed final site visits with each state. The purpose of the visit was to introduce closeout procedures, including the final report for each family and AIMS audits. In-person instruction and demonstration allowed the training team to work closely with individual staff members. With APL on hand to provide assistance and answer questions, Case Managers were given an opportunity to complete Phase 1 worksheets, and Site Coordinators were able to work on AIMS audits.

Summary report and final meetings. Phase V ended with a focus on producing a final Summary Report for each family and conducting a final meeting to discuss the report and the next steps. Training for this final step included two parts: 1) to provide specific direction on putting together the Summary Report, what to cover during the final meeting, and the final documentation in AIMS; 2) physically examining each Summary Report submitted for approval, making changes when needed and possible and/or requesting edits before printing.

Part B: Training Delivery

Almost as important as the content within a training, the way in which a training is delivered can have an extraordinary impact on its efficacy and success. The ASPIRE training program took into consideration the import of training delivery, and several features were deliberated and calculated in the development of individual presentations. These included the methods for delivery, the software and technology needed, and the appropriate facilitator or presenter to deliver the topic.

Methods

The ASPIRE training plan utilized several different methods to deliver training. The training delivery methods considered Adult Learning concepts, and focused on delivering information based upon auditory, visual, and kinesthetic learning styles, to try and connect successfully with each ASPIRE staff member. The method used per training session/topic was chosen in part by the content needing to be delivered, as well as logistical considerations. (Due to the nature of working with a six-state consortium, in some cases the delivery method chosen was not ideal, but efforts were made to deliver the training in the most effective way possible. See Part E: Considerations and Challenges for more details.)

ASPIRE procedure manual. The main source of ASPIRE procedures and practices. The procedure manual was developed beginning in 2014, and modified over the course of the ASPIRE project, as the needs and direction of the project changed/evolved. The procedure manual included scripts, time tables, screenshots, flowcharts, and other visual aids, to showcase step-by-step methods for completing needed work.

Training Tuesdays. Each month a new training was offered to ASPIRE staff, at the same time/day of the week via an hour-long webinar. Staff were expected to set aside this time each month and plan on attending the training; offering the training at a set time each month made it easier for staff across six states (and the Evaluation Team) to participate on a regular basis.

In some cases, the training provided was optional, or only required for specific roles. In other cases, the training was mandatory for all ASPIRE staff. The live Training Tuesday presentations were recorded for staff to view who were unable to attend, and to allow staff to revisit certain topics as needed. Additionally, the recorded Training Tuesday sessions were added to the onboarding list for new employees.

Recorded modules. Some training modules were not presented live, but rather pre-recorded and offered to staff via the ASPIRE staff website. Trainings were chosen for pre-recording at times due to the technical difficulty of presenting the information live (e.g., showing multiple screens at a time, demonstrating difficult concepts in AIMS), others were recorded to allow for different learning tools that would not be possible live (e.g., video clips, animations), and some were pre-recorded to account for staff time, such as those that required longer than an hour to fully present the material, or times when many staff would be out of the office for vacations or holidays.

In-person training. In-person training was utilized via All-ASPIRE training weeks and individual site visits. In-person training incorporated other training methods and materials as well, such as PowerPoint presentations and handouts, but the primary focus was on maximizing the face-to-face time with training themes that would be less effective in a distance learning setting. Therefore, training in this environment centered on hands-on work, demonstrations, conversation/discussion, and Q&A sessions. In-person training was delivered in several arrangements, based upon the topic discussed and the needs of the participant(s):

- Full ASPIRE group
- Multiple, mixed small groups
- Site-specific groups

- Role-specific groups
- Individual (1:1) sessions

Case reviews. Case Reviews focused primarily on the work of Case Managers, although Support Staff were at times included in the process, depending on their work in AIMS. Case Reviews involved a visual inspection of data entry in AIMS and a comparison to existing ASPIRE procedure, followed by written feedback of the results. Case Reviews were conducted by APL, Site Coordinators, Evaluation Team, and Case Managers at different times throughout the project. Some highlights from the Case Review process include:

- *Tools.* The overarching feature of these reviews was a focus on recognition of good work and suggestions for improvement where needed. Several tools were developed to assist in this process, including a tool developed by Site Coordinators, two by APL[1], and a different tool used by the Evaluation Team. Each tool followed a similar pattern – a prompt for a specific area of AIMS to review, and a place to provide written feedback of the results.
- *Conversations.* In addition to the written feedback, the ASPIRE Trainers implemented a discussion component to the review process. This conference-call discussion, formally labeled "Case Review Conversations," provided Case Managers with an opportunity to go over the review findings with the trainers, ask questions, and receive clarification where needed. The process was standardized, to ensure all staff received equal attention with individualized feedback. It also allowed the trainers to highlight specific areas of concern in the review, recommend practices for improving work, and gain insight and knowledge of common areas for misunderstanding and confusion. This helped drive future trainings that worked to address those areas, and as a result, Case Review Conversations came to be a mandatory feature of the trainers' Case Review process.
- *Peer reviews.* Peer Reviews were a different take on the standard ASPIRE Trainer case review. Case Managers were assigned a specific case to review of one of their peers, using a modified tool (Peer & Trainer Case Review template[2]). Case Managers were provided with instructions, a cheat sheet, and case review examples[1] to help them complete the Peer Review task.

  Additionally, the Trainers reviewed the same SID case files as the Case Managers and added feedback to the Peer Review where appropriate. Conversations were then held to discuss (1) the peer review the Case Manager completed, and the additions made by the trainer if applicable, and (2) the peer review done on the Case Manager's behalf. This allowed Case Managers to see

[1] See Appendix B
[2] See Appendix B

the review process from a different perspective, compare their findings with that of the trainers, and receive feedback from a colleague working in the same role. The Trainers utilized Peer Review Conversation forms[1] for each meeting.

Materials. Materials were used extensively throughout ASPIRE. Materials were developed for printing or electronic viewing, and typically were provided to staff in hardcopy or in PDF format on the staff website. Some materials were developed to be used in concert with other training methods, such as webinars and recorded modules, while others were created as stand-alone training tools. Although not a comprehensive list, some of the materials created included:

- Scripts for making phone calls to prospective and/or enrolled ASPIRE families
- Flowcharts providing a visual progression of specific ASPIRE processes
- Decision trees demonstrating step-by-step instructions for multi-faceted ASPIRE areas
- Cheat Sheets that included screenshots and text to provide instruction and tips for areas commonly misunderstood or confused in the project, primarily related to AIMS
- Samples and examples handouts showing how a completed ASPIRE process, such as documentation in AIMS, might look. (Although samples and examples used fictional ASPIRE youth, many of the pieces and inspiration for the handouts were taken from work already in AIMS, to provide a greater degree of "reality" rather than a picture-perfect and seemingly unrealistic scenario.)
- Worksheets to emphasize specific ASPIRE training points
- Visual aids and graphics that provided quick-glance reminders and prompts

Wednesday's Word to the Wise. Implemented in 2017, the Wednesday's Word to the Wise was a regular letter/bulletin to all ASPIRE staff, outlining information on a specific topic. Written by the Project Director, with feedback and input from the APL team, these weekly communiqués provided a link from management to "frontline" staff, giving them up-to-date and pertinent information in a timely and accessible manner. The Wednesday's Word to the Wise was emailed directly to each ASPIRE staff member and linked on the ASPIRE staff website. New employees were provided a complete list[1], updated after each new edition, and directed to read past versions to get the most updated information. Topics for the Word to the Wise varied, but were typically chosen based upon the following:

- Recent events (e.g., data breach)
- Upcoming occasions (e.g., deadlines)
- New procedures or processes (e.g., ABLE accounts)
- Common issues/concerns (e.g., AIMS procedures)

[1] See Appendix B

- And general reminders and best practices

Miscellaneous. In addition to the methods listed above, intermittent training methods were used on a case-by-case basis. Impromptu training was delivered via telephone and email exchanges, and in some cases, meetings were scheduled with individual staff members to address specific concerns. Additionally, the ASPIRE Trainers occasionally attended staff meetings, via teleconference, at the request of Site Coordinators, and in some instances the Trainers traveled to ASPIRE states to provide training to specific staff members. ASPIRE staff were encouraged to reach out to the trainers often and as needed, and the trainers used an "on-call" approach to respond quickly to the varying needs of staff.

Applications, Software, and Technology

The training program had to consider many aspects, such as distance learning techniques and working with adult learners, in order to reach ASPIRE team members across the consortium. To do this successfully, the Trainers spent time identifying different platforms, applications, and programs that could benefit ASPIRE, and the Trainers utilized many of these technology-related tools over the course of the project.

Camtasia. Software used to create presentations and training modules. Camtasia was used from an early point in the project; the first training developed with Camtasia in April 2014, and the ASPIRE license was renewed each year through the end of the project. Camtasia offered several tools to create presentations, including an add-in with Microsoft PowerPoint, an ability to record the screen (used extensively for AIMS demonstrations), and a quizzing feature which allowed the Trainers to evaluate employees' understanding of concepts, as well as seek feedback.

TechSmith. Camtasia's publisher, TechSmith provided a quiz tracking service, with a web-based site to see up-to-date quiz completions[1], as well as nightly emails with Microsoft Excel spreadsheets for every quiz completed (per module). These tools allowed the Trainers to monitor completion of required trainings, refer staff for retakes if quizzes were not passed, and identify areas where a large percentage of staff struggled, to inform future training possibilities.

Microsoft PowerPoint. Used throughout the project to develop trainings, often in conjunction with Camtasia. PowerPoint served as the main method for storyboarding a presentation idea, and to create graphics and flowcharts. Animations and transitions were used regularly to emphasize concepts, direct attention, and add interest.

Microsoft Word. Software used to develop handouts, graphics, charts, and decision trees to complement recorded or live training sessions. Word was also used regularly to develop content scripts for training presentations, which were then used to gather feedback and suggestions from APL. Onboarding practice scenarios, case review templates, cheat sheets, and example cases are some of the types of documents for which Word was used.

Microsoft Publisher. Used primarily at the beginning of ASPIRE to assist with the development of promotional materials. Several promotional materials were developed using Publisher, such as the Professional Flyer[1] and a promotion brochure mockup.

Microsoft Excel. Although not used as regularly as other Microsoft Office products for training, Excel was used regularly for tracking. This use included tracking training requirements and completions, quiz completions via Camtasia, case review tracking, and audit tracking. Excel was also the software used to develop the Audit Tool, which was used by staff from late 2018 to the end of the project in 2019 to conduct case audits in AIMS. In general, Excel served as a tool for the Trainers, and was not typically used in the development or presentation of trainings.

Audacity (w/ microphones). Software used for recording audio and editing digital audio files. Audacity was used beginning in early 2015, along with purchased microphones, to improve the audio quality of training modules. Recordings made with Audacity were then imported to Camtasia to build the full training module.

Adobe creative cloud. Adobe Audition and Premier were occasionally used in place of Audacity and in conjunction with Camtasia, for audio recording/editing and video editing tasks. Additionally, most documents, handouts, and visual aids developed for ASPIRE were saved as PDFs prior to being placed on the ASPIRE website, and Adobe Professional was regularly used for this purpose.

Snipping Tool. Application used to capture screenshots of important items, to be used in recorded modules, PowerPoints, Word documents, and live trainings. The Snipping Tool was used extensively in formal trainings, but was also utilized regularly in informal training sessions, such as email exchanges. It allowed APL to field questions via email, in areas such as AIMS or the procedure manual, with a visual component for support/emphasis.

GoToMeeting and GoToWebinar. Online meeting service used from the beginning of ASPIRE through the end of the project. Both platforms were used in a variety of ways in ASPIRE, including scheduled meetings, impromptu sessions, and “internally” for testing different training components. The decision to use GoToMeeting or GoToWebinar depended mainly on the basic needs of the session. For instance, GoToMeeting was typically used for smaller trainings and impromptu meetings, when only basic screen-sharing and minimal setup was needed.

[1] See Appendix B

In contrast, GoToWebinar was used when larger trainings were needed, as the number of attendees allowed was three times greater than GoToMeeting. GoToWebinar also allowed for advanced screen-sharing features, such as highlight and drawing tools, screen pausing, and an audience-view camera. It also offered the opportunity to add in Poll questions and attach handouts. However, setup was more labor intensive for GoToWebinar, which made it an unnecessary choice for smaller, more informal sessions (such as 1:1 AIMS walkthroughs with new employees). With both platforms, sessions were able to be recorded, and this feature was often used when a copy of a training was needed for the website or for archival purposes.

Google Drive. ASPIRE used this file sharing and storage application in many ways during the project, with training needs as just one of its many uses. Access was typically given to APL, Site Coordinators, and the Evaluation Team. These individuals could then access specific files/folders, add input or updated information, and check the status of items. For training, Google Drive was used mainly for monitoring/tracking purposes. For instance, shared access was granted to the ASPIRE Action Plan and the ASPIRE Check-In Tracking. Case Managers were given access to the Case Review Conversation calendars, which allowed them to see the time slots available and schedule their conference call with the trainers to discuss case reviews (see *Case Reviews/Conversations* for more information).

Wiggio. An online sharing site used at the beginning of ASPIRE. Wiggio was able to perform many tasks for ASPIRE, including acting as a file sharing and storage application, a calendar and scheduling application, and a group meeting application. Wiggio was used extensively by the ASPIRE work groups in 2014 to share ideas, add updated plans and documents, schedule work group meetings, etc. Wiggio's use in ASPIRE decreased when work groups were no longer active and ASPIRE did not use Wiggio often past 2015. Eventually Wiggio was phased out and items from the site were archived.

ASPIRE staff website. The website was the main source to access all ASPIRE training materials. With a special login page for employees, staff were able to access proprietary information, including all recorded training modules and webinars, Wednesday's Word to Wise documents, the ASPIRE procedure manual, and complementary training tools, such as handouts, flowcharts, and cheat sheets.

Facilitators and instructors

Many different individuals and entities contributed to the ASPIRE training program across the length of the study. Both internal staff members and external sources helped with ASPIRE trainings. Internally, ASPIRE staff assisted with trainings through participation in All-ASPIRE planning committees, survey and evaluation feedback, and the development and presentation of material.

Whether the presenter was an ASPIRE staff member or an external contributor, assistance was sought from people/organizations with expertise related to the subject matter and/or those who had strong presentation skills. The following table lists these contributors, along with the training(s) they participated in. (For more information on training content, see Part D: Content and Topics.)

ASPIRE Staff and other Internal Contributors		
Name	**State / Agency**	**Training**
Douglas Allred, Site Coordinator	Utah	- *Action Statements* - *Case Management Cycle* (w/ Chris Fosdick)
Amy Armstrong, Site Coordinator	North Dakota	- *Rural Challenges* (w/ Carol Ruddell)
ASPIRE Case Managers: Saara Grizzell Tynell Millner Becky Daigneault Kim York Aaron Kyser Shelley Baudean	 Utah South Dakota North Dakota Montana Colorado Arizona	- *Enrollment Panel*
Selete Avoke, Education Program Specialist	OSEP U.S. Department of Education	- *US Department of Education – PROMISE Update*
Robin Bauknecht, Site Coordinator	Colorado	- *Tools of Engagement I & II* (w/ Chris Fosdick)
Travis Catt, Case Manager	Arizona	- *Action Statements*
Cathy Chambless, Evaluator	University of Utah	- *Culture and Diversity* - *Bridges ~~o~~Out of Poverty* (w/ Bob Shogren) - *Assessment, Planning, and Goal Development* (w/ APL) - *Get SMART: ASPIRE Services Goal – Independent Living* (w/ APL)

		- *Get SMART: ASPIRE Services Goal – Parents* (w/ APL) - *Get SMART: ASPIRE Services Goal – Employment* (w/ APL) - *Case Management* (w/ APL)
Jody Dettmer-Johnson, Case Manager	Colorado	- *Action Statements*
David Emenheiser, Education Program Specialist	OSEP U.S. Department of Education	- *Department of Education – The vision and the Partners* - *PROMISE – ASPIRE* - *PROMISE Context & Expectations* - *PROMISE Context & Expectations, cont.* - *OSEP Update* - *OSEP Update, cont.* - *No Cost Extension – Looking at the Future* (w/ Carol Ruddell) - *Federal Requirements – Closing PROMISE* - *PROMISE Updates* - *Performance Measures – Implications to PROMISE* (w/ Carol Ruddell) - *No Cost Extension Update – Closing ASPIRE with Fidelity* (w/ Carol Ruddell)
Formative Evaluation Team	University of Utah University of Montana University of Kansas	- *Evaluation 101: Making the most of the data* - *Evaluation Team Q&A* - *Evaluation 201* - *Evaluation 301* - *Evaluation 401* - *Evaluation Extravaganza* - *Evaluation Extravaganza Continues* - *My Takeaways* (w/ APL)
Barry Gravatt, Case Manager	South Dakota	- *ASPIRE Release of Information* - *Section 301: The "How To"*
Becca Goe, Evaluator	University of Montana	- *Recruitment*
Jean Hall,	University of Kansas	- *Work Groups*

Evaluator		
Catherine Ipsen, Evaluator	University of Montana	- *Informed Consent*
Sang Hee Kim, Site Coordinator	Arizona	- *ASPIRE Release of Information*
Noelle Kurth, Evaluator	University of Kansas	- *Baseline Youth and Parent Surveys*
Mary Livermont, Site Coordinator	South Dakota	- *Acting on the Action Plan* (w/ Carol Ruddell)
Gina Livermore, Senior Researcher	Center for Studying Disability Policy, MPR	- *The Random Assignment System, MPR* (w/ AnnaMaria McCutcheon)
Mark Mahnke, Case Manager	Montana	- *Action Statements*
Marianne Marts, Case Manager	Arizona	- *It's not IF, but WHEN* - *Case Management Cycle* (w/ Chris Fosdick)
Sara McCormick, Principal Investigator	University of Utah	- *Overview Recruitment, Enrollment, and More* - *Enrollment* - *Reports in AIMS* - *Referrals to Non-ASPIRE Services*
James Rivera, CM Supervisor	Arizona	- *Let's Get Comfortable with Being Uncomfortable*
Bob Shogren, State Manager	Arizona	- *Bridges out of Poverty* (w/ Cathy Chambless)
Cruzita Tafoya, Case Manager	Colorado	- *Acting on the Action Plan* (w/ Carol Ruddell)
Mei Xue, REDCap Manager	REDCap – University of Utah	- *ASPIRE Information Management System* (w/ Sara McCormick)
* In addition to the above list, during the Spring 2018 All-ASPIRE training, each ASPIRE staff member prepared a Personal Highlight and presented to the group.		

External Individual / Agency Contributors		
Name	**State / Agency**	**Training**
Alan Akina, **Founder / CEO**	101 Financial	- *The Five Money Principles That Everyone Needs to Know* - *How to Host a Dream Board Night*
Colorado East Community Action Agency	Colorado East Community Action Agency	- *Poverty Simulation*
Sharon Cook, **Program Manager**	Utah Division of Substance Abuse and Mental Health	- *Compassion – Self Care for the Caring Professional*
Emerald Cronin, **Associate**	Economic Mobility Pathways	- *Mobility Mentoring® and Executive Functioning Informed Coaching*
Margot Dana, **UWIPS Training Coordinator**	Utah State Office of Rehabilitation	- *SSI and Children- Considerations*
Armand Drummond, **Human Resource Director**	Division of Human Resource Management	- *Am I Ready? – Job Seeking* (w/ Bart Olsen)
Cary Griffin, **CEO**	Griffin-Hammis Associates, Inc.	*Customized Employment Series:* - *Overview of Customized Employment* - *Reviewing the Elements of Discovering Personal Genius (DPG)* - *Discovery Essentials* - *Discovery Activities that Support Customized Job Development* - *Communicating with Employers* - *Informational Interviews* - *Job Development Staging*
Group: **Parents of children & young adults with disabilities**	Utah area	- *Parent Panel*
Ron Hagar, **Senior Staff Attorney**	National Disability Rights Network	- *IDEA & FERPA: The Intersection at Age 18*

Tricia Jones-Parkin, Employment Program Manager	Utah Division of Services for People with Disabilities	- *What's Happening at the Federal Level?*
Leah Lobato, Executive Director	Governor's Committee on Employment of People with Disabilities	- *How Do I Find It? – Navigating Employment*
Susan Loving, Transition Specialist	Utah State Office of Education	- *ASPIRE's Role – Interrupted School Enrollment*
Heather Lynch, MI Trainer & VR Counselor	MINT Member	- *Motivational Interviewing: A Catalyst for Change*
Chris Nguyen, Housing Coordinator	Division of Services for People with Disabilities	- *Bridges ~~o~~Out of Poverty*
Bart Olsen, Assistant Director & Lance Olsen, Assistant Communication Director	Division of Human Resource Management Division of Workforce Services	*Outward Mindset Series:* - *Why Mindset Matters* - *The Two Mindsets* - *Self-Betrayal* - *Inward Mindset Styles* - *Collusion* - *Self-Awareness Tools* - *Influence Pyramid* - *Outward Mindset Pattern* - *Turning the Chair, Resources* - *Situational Activities / Organizational Transformation* - *Turning Jobs Outward* - *What I do & Who I Impact: Analyzing SAM* - *Outward Accountability: #A+* - *Performance Standard* - *Individual Tools for Working Outward*
Jared Schultz, Assistant Professor	Utah State University	*Ethics in Practice Series:* - *Understanding the Wherefore and the Why* - *Where Do We Go from Here? – Ethical Issues for ASPIRE*

Ken Sekaquaptewa, Program Director	Native American Initiative Utah Valley University	- *Cultural Competency and Ethnic Diversity*
Tom Smith, Business relations Specialist	Utah State Office of Rehabilitation	- *Panel of (Local) Business Leaders:* o Shane Zimmerman, Program Manager and Outreach Recruitment Coordinator – Forest Service o Brian Bearor, Disability Program Manager – Forest Service o Obed DeLuc, Vice President – Goldman Sachs o Shannon Wilkins, Associate Executive Director – Community Options, Inc. o Rick Schwemmer, Director of Human Resources – Marriott
Van Tai, SSI Technical Expert	Contracted via AUCD	- *Redetermination at Age 18*

Part C: Assessment, Development, and Monitoring

Training development in ASPIRE typically followed a set pattern, which included identifying a training need, developing a training to meet that need, monitoring for training effectiveness, and adjusting as necessary. While some training took place in a more informal manner (e.g., email exchanges), most training was produced and monitored using a formal process and provided to all ASPIRE staff. This helped promote fidelity throughout the project and assisted with consistency and communication across the consortium.

The ADDIE Model

To implement a successful training program, the program should include a deliberate and thoughtful system that utilizes a formal process to: 1) understand training needs, 2) seek to address those needs, 3) evaluate outcomes. The ASPIRE Training Program most closely followed the ADDIE model, which consists of assessing training needs, designing the training, developing the training, implementing the training, and finally evaluating the training for effectiveness.

Assessment of training needs.
The training needs of ASPIRE were assessed using a variety of methods. Some needs were more straightforward and entailed simply showing staff how to complete a new item or informing them of a new procedure. Other needs were determined by completing case reviews of work done in AIMS, during conversations with staff members, and

through training quizzes and assignments. For instance, common errors or areas of confusion across ASPIRE were indications that additional or revised training was needed.

Additionally, the formative evaluation team provided insight into areas where further training was required by evaluating the data from AIMS and providing statistical analyses in specific areas. Areas in consideration of needing training or requiring additional training were discussed in APL team meetings, during Management Team calls, with Evaluation team members, and/or Site Coordinators, depending on the subject.

Designing the training. Once a training need was identified, the training team developed a plan for addressing that need. During this period the training modality, presenter, and timeline was decided upon, and assignments were often divided between Trainers to accomplish the plan.

In choosing the modality, the plan was generally influenced by the specific training topic and any potential constraints of the consortium. For instance, trainings requiring numerous screenshots and other visuals to demonstrate a concept were most likely to be completed via recorded module. In contrast, training needs that were best served through practical application, such as role plays or data entry practice, were often planned for times when in-person instruction could take place, such as site visits or All-ASPIRE trainings.

Similarly, the subject of the training often informed decisions on who would be best suited to present the material. When the topic related to AIMS, ASPIRE procedure, PII and security, or case management best practices, the presenter was generally a member of the APL team. Other individuals were invited to present material based upon their knowledge of the subject, their ability to connect and engage with an audience, and/or their interest in being part of the training plan. At times, the training team researched potential presenters, in order to find someone with the knowledge and skills needed to instruct on a specific topic.

Timelines were determined by both how pressing the need for the training was and the time requirements needed to produce the training. Generally, the team attempted to develop training in a timely manner, and specific deadlines were decided upon to encourage the swift completion of material. However, at times, training had to wait for additional information or procedure to be solidified. In other cases, training items were more complex than originally anticipated, and deadlines had to be extended in order to produce the most effective training for ASPIRE staff. One challenge to the training timelines was the requirement, early in the project, for multiple parties to provide feedback on training in development, which typically extended the timeframes. (See more on this challenge in “Part E: Considerations and Challenges.”)

Developing the training. Once the plan for a training was agreed upon, development began. Development started with creating an outline for the training. This outline included a brainstorm of all items that needed to be covered in the training, identifying the main points or takeaways the training should cover, and the order for presenting the material. During this brainstorm time, ideas for the visual aspects of the training were also discussed. The training team looked for ways to engage the audience, and drive home important points or features, through the use of visual aids, diagrams, videos, demonstrations, etc. The outline portion of the process was generally the time when these supplemental materials were discussed and decided upon and assigned to individuals to produce.

After the outline was created, the next step varied depending on if the training was produced in-house or outsourced to an external agency or presenter. If the training was outsourced to a presenter outside APL, communication took place on training expectations and needs, using the outline as a guide, and the presenter then developed the training in their own manner. However, meetings and discussions took place regularly with external presenters, to ensure their development matched the vision of the training team.

If development of the training was internal – typically within the APL team, the next step in the process was to develop a script for the training. The script, though not necessarily something to be used verbatim during actual recording or presentation of the training, provided an opportunity to think through each point of the training, decide what needed to be stated or to highlight specific items, and in general produce a training that was intentional and deliberate, rather than spontaneous or impulsive. This ensured that important points were covered, and items were not unintentionally left out. It also helped pinpoint holes in the training or areas that were previously not considered.

Once the outline and script were complete, the physical development of the training took place. This was often done using PowerPoint and Camtasia and relied a great deal on the creativity of the trainer on what color schemes, graphics, and animation/transitions to use to add interest to the material. Throughout the development process, the APL team would meet and discuss the progress of the training, talk about ideas that worked and those that were not effective, providing feedback and constructive criticism on draft material. Once all concerns were address in the draft version of the training, a final version was produced or delivered.

Implementing the training. Training was implemented in a variety of ways. If the training was a recorded module, the module was placed on the website and staff were notified of the new requirement, where to find the training link, and the deadline for completion.

If the training was delivered via webinar, it typically took place during the scheduled Training Tuesday that month, and staff were reminded of the date and time in advance. These live training were also recorded, using GoToWebinar/Meeting software, and placed on the ASPIRE website for any staff who were unable to attend the live version.

Live, in-person trainings were typically a “one and done” implementation. While they were often recorded for makeup training sessions for those not in attendance, they were rarely placed on the website for additional viewing by current employees or for new staff. This was often because the training provided in-person was not well suited for recording and would not be an effective training for staff to view later. Instead, if training from in-person sessions was needed for new staff, other modalities were utilized.

Evaluating the training. Each training developed for ASPIRE included some measure of evaluation. This evaluation allowed the training team to determine the efficacy of the training and identify new training needs. The method of evaluation varied; some trainings required a quiz or knowledge check, and others offered a survey for feedback at completion.

Training efficacy was determine using quiz results, such as if multiple people missed the same question, as well as review of work in the months following the training. In other cases, surveys allowed staff to offer feedback on what they understood, areas that required additional clarification, and suggestions for additional or supplementary training they would like to see.

All training through ASPIRE was tracked and monitored by the training team, to ensure compliance with requirements, to determine project-wide issues or concerns, and to identify specific individuals struggling who might need additional training or 1:1 assistance from the trainer.

Tracking

Delivering training material is only one task of a successful training program. In order to properly gauge a training’s effectiveness, and staff compliance to training requirements, outcomes and completions of trainings must be monitored by the training team. The main method used to monitor training completion, efficacy, and adherence to procedure was through the tracking system. The Training Tracking system was implemented at the beginning of the project, and maintained through May 2019, when the Case Managers and Support Staff completed their time with ASPIRE.

Background. The Training Tracking system consisted of two parts – an AIMS project and an Excel workbook. Originally, the intent was to track all training completions via the AIMS Staff Information instrument. This was later amended to decrease the burden on AIMS administrators, as new trainings were completed regularly, and adding them to AIMS each time was not a feasible solution. Instead, AIMS was used to track trainings and requirements connected to IRB agreements, such as Human Subjects Resource Training and Suitability clearances, as this allowed for easy reporting, whereas an Excel workbook was created to tracking *all* training. This workbook enabled the tracking system to grow with the project. It also provided the means to maintain records for all staff, former and current, and their training completions across time, ensuring that the final Training Tracking workbook[1] would contain all information from 2014 through 2019, in one document.

Data entered into the Staff Information instrument and the Training Tracking workbook was derived from several sources. Some information was obtained from Site Coordinators, such as dates for completion of state-specific training like Ethics or Cultural Competency. Other information was gathered from reports automatically sent each day from TechSmith, containing details of training attempts for specific recorded modules. The ASPIRE Trainers also obtained information from first-hand training of new and current employees.

Setup. The format of the Training Tracking workbook underwent a few adjustments during the course of ASPIRE, but it functioned in the same manner throughout the project. It was built to mirror the order and title of trainings on the ASPIRE website, which allowed staff to compare the tracking with website trainings and more easily find needed modules.

The general setup of the workbook consisted of staff names, titles of trainings, and dates entered in cells indicating a training was completed. The Training Tracking workbook was divided into several worksheets, one for each ASPIRE Site team, as well as tabs for former employee records. Each worksheet was identical, and only differed in the staff names/roles listed across the top. Each worksheet contained nine categories of trainings: ASPIRE Security, Overview: Orientation to ASPIRE, Case Management, AIMS, Training Tuesday & Other Required Training, ASPIRE Reviews, All-ASPIRE Training, Professional Development, and ASPIRE Youth: Recruitment, Enrollment, Random Assignment. Within these categories, all ASPIRE trainings were listed.

The worksheets also included a color-coded system, to assist staff with interpreting the tracking information, such as red shading for trainings overdue and purple shading for new trainings to complete. Comments were used to provide additional information, such as if a module quiz was not passed with the required score; an added comment would indicate what score was achieved. In other cases, comments were used to keep track of trainings that were completed annually or repeated, with comment boxes indicating dates of previous completions.

The Tracking was also kept up to date with required training changes and staff turnover. As new trainings were developed, additional rows were added to each worksheet. When trainings were no longer required (e.g., recruitment and enrollment modules), the trainings were not removed, but the cells were filled with diagonal lines to indicate the training was no

[1] See Appendix B

longer needed. Likewise, staff members' individual information was not deleted from the tracking sheet upon leaving ASPIRE, but instead was moved to a separate worksheet, labeled "Former Staff," in order to maintain complete training records.

Procedures. The ASPIRE Trainers devised internal procedures for keeping project staff apprised of their training progress, using the Training Tracking. These procedures were adjusted as the project advanced, to best match the needs of each site. For example, at the beginning of ASPIRE, the Staff Information instrument in AIMS and the Training Tracking workbook were updated each week, using the sources mentioned above. After updating, the workbook was saved into separate files, one worksheet per state, and emailed to the corresponding Site Coordinator. The full workbook was also sent to each member of APL and the Principal Investigator.

In addition to sending the Excel document, the Trainers often used these tracking emails to clarify areas of confusion on the tracking itself or provide more information related to a recent event, as well as to update staff on new trainings, remind them of trainings coming due, or prompt Site Coordinators to talk with staff about past due or required trainings.

As training progressed and the tracking did not require updating as regularly, the procedure changed to update the document and AIMS every other week before sending it to individual sites/teams. The final two years of the project saw an additional shift in the tracking procedures. Rather than sending each team a separate worksheet with site-only information, the full workbook was emailed to all Site Coordinators, the APL team, and the Principal Investigator on a biweekly basis.

Although not directly related to the Training Tracking workbook, it should be noted that similar tracking systems were used to monitor completion of case reviews, Case Review Conversations, and audits. These tracking systems were implemented internally for use by APL and were not shared with site staff.

Part D: Content and Topics

The ASPIRE Training Program covered a wide variety of topics over the course of the project. The material was chosen to ensure staff were prepared and equipped to manage procedures and new phases as ASPIRE evolved. Content was also geared toward the specific needs of the study at a point in time, and the individual needs of ASPIRE sites/staff.

Training began with an onboarding process to orient new employees to the project. During the project, staff were provided additional learning opportunities through site visits and biannual All-ASPIRE trainings. However, the majority of training took place remotely, using primarily recorded modules and live webinars. The following sections discuss the different types of training provided to ASPIRE staff, as well as a summary of each presentation/session.

Onboarding/New Hires

The overarching objective of the ASPIRE training program was for all ASPIRE staff to receive all training, regardless of role/position. Some modifications were made to this objective as the study progressed and some areas were no longer relevant (e.g., recruitment). However, the general goals for onboarding remained the same. These goals included:

1. Provide background on the PROMISE Initiative and ASPIRE's place within PROMISE.
2. Provide general training on research study components and expectations.
3. Orient the new employee to all ASPIRE procedures and up-to-date information.

In addition to watching recorded trainings, new employees were required to engage in practical application, via practice sessions and live walkthroughs, where concepts from the modules could be emphasized and staff could work on skill development. Practical application requirements varied by position, but generally consisted of:

- Role play practices with colleagues - covering promotion, recruitment, enrollment, and random assignment
- Live AIMS walkthrough via Webinar with ASPIRE Trainers - covering each instrument in AIMS, how they are used, considerations, and data entry guidelines
- AIMS Training Project practice – allowing new employees to get comfortable with AIMS, prior to accessing the live site. Initially, new employees were allowed free range to practice and play around with the AIMS training site. However, formal AIMS Practice Scenarios[1] with tasks were eventually developed to help guide new staff and encourage more effective practice time. The scenarios varied based upon role, with Case Managers receiving different tasks to complete compared to Admin Support staff.

Site Coordinators were charged with monitoring the overall onboarding process, using the ASPIRE New Employee Process checklist[2]. The ASPIRE Trainers were responsible for monitoring completion of the training requirements within the checklist. Final approval for all training/onboarding completion and access to AIMS was given by the Project Director. Onboard training for new employees was recommended in a sequential format. New employees were encouraged to complete training in the following order:

1. Human Subjects Research Training
2. Acceptable Use of IT Resources
3. Security for Personally Identifiable Information

[1] See Appendix B
[2] See Appendix B

4. Orientation to ASPIRE (full series)
5. Recruitment: Identifying and Contacting Youth*
6. Enrollment: Consent and Information Gathering (full series) *
7. Random Assignment: ASPIRE and Usual Services Groups*
8. Intake and Assessment
9. Planning and Goal Development
10. Ongoing Case Management
11. Case Management Cycle
12. SSI and Children – Considerations
13. Live AIMS walkthrough with Trainers
14. AIMS Training Project practice
15. Practice with colleagues (discontinued after enrollment ended)

ASPIRE's onboarding process and procedures were developed and implemented by early 2015. Prior to 2015, ASPIRE staff received training as it was developed, primarily through the 2014 All-ASPIRE training weeks and the "Kick Off" site visit (see Site Visits). Subsequent trainings were added to the onboarding list as ASPIRE progressed, as seen in the following subsection "Training List." As a result, new employees in 2018 received significantly more onboard training than those hired in 2015. However, using the objective of "all training for all staff," all ASPIRE employees received approximately the same training, regardless of hire date.

Site Visits

In addition to the trainings listed above, several trainings were offered during in-person site visits. Site visits were used to assist in initiating the recruitment and enrollment process, mid-point monitoring, and closing out the research study. Additionally, some site visits took place for individual sites/staff, to address pressing needs specific to only that entity.

The following table provides a list of the different site visits that took place throughout the study, and the general purpose and training focus during each visit.

Date	Where	Who	Purpose	Training Focus
2014	South Dakota Utah North Dakota Colorado	Project Director Trainer Principal Investigator	Kick-Off visit (required before recruitment and enrollment	- Meet and greet - ASPIRE procedure manual - Recruitment and enrollment process

2015	Arizona Montana		activities could begin in the state)	- Practice and role play recruitment and enrollment activities - Case Manager and Support Staff focus group
	Montana	Trainer	Orientation for new staff member	- ASPIRE procedure manual, sections 8-10 (recruitment, enrollment, random assignment) - Informed consent and AIMS practice - Demonstration of AIMS reports
2016	Arizona	Trainers Principal Investigator	Assistance to the Arizona team due to the delay in implementation in Arizona, and to clarify and counter mixed messages and confusion.	- Intake process - Case Management Cycle - Intervention documentation - AIMS discussion - ASPIRE case management - Question and answer session
2017	Arizona Colorado Montana North Dakota South Dakota Utah	Project Director Trainers	Mid-project monitoring visit, to ensure all ASPIRE staff complete the tasks and actions of ASPIRE to fidelity, and to address questions and discuss implementation	- AIMS reminders - Interventions – alternative delivery and documentation - Connecting with unresponsive families - Alternative living situations - Personal and team goals - Section 301 work incentive - State-specific challenges
	Utah			

	(two 1:1 makeup training visits)			- Individual staff meeting with the Project Director to discuss concerns and ask questions - Individual staff meeting with the Trainers, to go over case reviews, offer additional training on problem areas, and answer questions
2018	Arizona Colorado Montana North Dakota South Dakota Utah	Project Director Trainers	Preparing for the end, closing out ASPIRE	- Supported Online Financial Training – overview of the process - The Final Summary Report process - Completing Phase 1 - Ending the therapeutic relationship – ethical dilemmas and challenges - Overview of audits - Using the audit tool (Trainers and Site Coordinator) - Case management, ABLE accounts, Section 301 (Case Managers and Project Director)

All-ASPIRE Trainings

Biannual All-ASPIRE trainings, required by the PROMISE award, provided a regular opportunity for the ASPIRE training program to pursue specific themes and assemble a training package that emphasized these themes. Beginning in Spring 2014 and ending in Spring 2018, a total of nine All-ASPIRE training weeks took place during the project. All-ASPIRE trainings rotated in location ~~between~~ among the Denver, Phoenix, and Salt Lake City areas, and occurred over the course of 3-5 days.

The All-ASPIRE was mandatory for all staff, with occasional exceptions for support staff or to accommodate a disability. Attendance in-person was expected, but permission could be granted for specific situations when in-person attendance was not possible. In all cases, when individual sessions or full training weeks were missed, staff were required to attend a makeup training facilitated by the Trainers. Makeup trainings covered the same material as in-person sessions, and typically included watching of recorded sessions, webinar discussions, knowledge checks, and assignments.

All-ASPIRE training weeks aimed to take advantage of meeting in-person with all ASPIRE employees and roles present. Topics and presentation methods were chosen based both on the needs of staff and the ability to make the best use of this in-person time. Agendas for each week were developed to provide short sessions, with breaks and other activities interspersing more formal or complex topics, to promote learning and retention of training material.

The following is a summary for each All-ASPIRE training week. Agendas[1] showing specific session titles and time allotments for each training week can be found at the end of this report, along with All-ASPIRE PowerPoint[1] and handouts[1] samples.

Spring 2014, Salt Lake City. The main theme during this week was orientation to ASPIRE and the recruitment and enrollment process. This orientation also included components aimed at preparing staff for the different cultural factors presented in ASPIRE target population. Training sessions during this week included:

- The Big Picture – The Flow of ASPIRE
- Acceptable Use and Protecting PII
- Department of Education – The Vision and the Partners
- Overviews of Recruitment, Enrollment, Informed Consent, and Baseline Surveys
- Introduction to the Random Assignment System (RAS) and AIMS
- Work Groups
- Bridges Out of Poverty
- Culture and Diversity
- State Introductions
- Young Adults with Disabilities panel discussion

Fall 2014, Phoenix. The theme for this training week was the process from recruitment, to enrollment, to providing case management and ASPIRE services, highlighting practical application methods. Staff received more in-depth training on reaching out to families for the study and completing enrollments. They also received introductions to ASPIRE case management and using AIMS to assist with case management.
Training sessions during this week included:

- ASPIRE and PROMISE updates
- Plain Language – Introduction, Stick to the Blueprint, The Communication Circle

[1] See Appendix B

- Using the ASPIRE Visual Aid (with practice/roleplay)
- Reports in AIMS
- Developing and practicing a 30-second ASPIRE “spiel” (elevator speech)
- Managing and practicing phone calls from interested families
- Managing and practicing cold calls
- Assessment, Planning & Goal Development, and Case Management
- SMART goal writing
- Bridges Out of Poverty, continued

Spring 2015, Salt Lake City. The main theme for this training week was on filling the toolboxes of ASPIRE staff with tools to use in various ASPIRE capacities. This included providing tips and recommendations for enrollment, suggestions for building relationships and improving communication with ASPIRE families, and advice for self-care. In addition, staff were given opportunities to learn from others sharing their ASPIRE role, through position-specific breakout sessions. Training sessions during this week included:

- Enrollment Panel – celebrate and improve
- Speaking Without Words – Understanding and using nonverbal communication
- Tools of Engagement – Building relationships and increasing communication
- Assessment through Goal Development – A Case Study
- SMART Goals to Tasks – A Case Study
- Parents of Children with Disabilities panel
- Cultural Competency and Ethnic Diversity – Working with the Native American population
- Compassion – Self Care for the Caring Professional
- PII Concerns and Review
- Staff Forums (position-specific)

Fall 2015, Denver. The theme of this training week was youth employment. Training focused on employment as a possibility for all ASPIRE youth, customized employment options, and using ASPIRE case management practices to assist with employment goals. Training sessions during this week included:

- WORK, It’s not IF, but WHEN
- Customized Employment Training
- Rural Challenges
- Case Management Process – General Case Notes
- Case Management Process - Assessment
- Case Management Process - SMART Goals
- Case Management Process - Tasks for Goals
- Where Do I Put it All? – AIMS Data Entry

- Business / Employer panel discussion
- Emerging Issues in Security
- Staff Forums (position-specific)
- Evaluation 101: Making the most of the data
- Evaluation Team Q &A
- Team Highlights

Spring 2016, Phoenix. The focus of this week was improving connections with ASPIRE families, through motivational interviewing training and solutions-focused discussions of ASPIRE complex cases. Training this week also aimed to build off the employment theme from the Fall 2015 sessions, with an emphasis on preparing ASPIRE youth for summer employment opportunities. Training sessions during this week included:

- Motivational Interviewing
- Summer Employment Brainstorming
- ASPIRE Complex Cases
- Drop Out Prevention
- Case Management: Case Review Tool
- Annual Report & 3+2 Review
- Age 18 Considerations
- Evaluation 201
- Security and PII
- PROMISE, ASPIRE, and team updates

Fall 2016, Denver. This training week incorporated two main themes, culture/diversity training and moving forward in ASPIRE. The first was achieved through several sessions related to working with other cultures, understanding poverty, and recognizing ASPIRE's culture. The second was achieved through sessions related to planning for the remaining time in ASPIRE, learning from each other through information exchanges, and the ASPIRE Action Plan. Training sessions during this week included:

- Let's Get Comfortable with Being Uncomfortable
- Poverty Simulation
- Looking In and Reaching Out
- Site to Site Exchange – Effective Collaboration
- ASPIRE's Action – the next two years
- Acting on the Action Plan
- ASPIRE's Role – Interrupted School Enrollment
- PROMISE Context & Expectations
- Evaluation 301
- Team Highlights

- Technology / Security Update

Spring 2017, Phoenix. The main theme of this week's training was building the skills of staff, to better prepare them to help build the skills of others. This was accomplished with sessions focusing on general skill building, as well as sessions focused on improving skills in the financial capability area, an area in need of improvement in ASPIRE. Training sessions during this week included:

- Mobility Mentoring and Executive Functioning Informed Coaching
- The Five Money Principles that Everyone Needs to Know
- How to Host a Dream Board Night
- Acting on the Action Plan
- Highlighting Youth and Families
- My Takeaways – Group Discussion
- Make a Plan – Team Discussions
- Project Report
- OSEP Update
- Evaluation 401
- Technology / Security Update

Fall 2017, Phoenix. The focus of this week was self-reflection, awareness, and improvement, through the learning of the Outward Mindset training curriculum. The purpose was to help staff recognize areas in their own lives – home, work, and personal - that could benefit from an outward mindset, and subsequently allow this information to inform their work with colleagues and ASPIRE families. Training sessions during this week included:

- Outward Mindset
- No Cost Extension – Looking at the Future
- ASPIRE Check-In
- Revisiting the Action Plan
- Make a Plan – Team Discussions
- Evaluation Extravaganza
- ASPIRE and OSEP Updates
- Team Highlights
- Security training

Spring 2018, Salt Lake City. The final All-ASPIRE meeting was split into three distinct but connected, themes or tracks. The first was centered on ASPIRE staff employment, identifying the skills developed through ASPIRE, and how to present that to future employers. Case Managers were encouraged to use the same information to assist with ASPIRE families. The second track was focused on ethical practices within the context of the project ending and future interactions with ASPIRE participants. The third track emphasized ASPIRE staff –

highlighting their accomplishments in the project, providing an opportunity for each to share, and giving tools to use for self-care as they end their time with ASPIRE.
Training sessions during this week included:

- What Do I Know – KSAs
- How Do I Find It – Navigating Employment
- Am I Ready – Job Seeking
- How Do I Present Myself – Interviewing
- Business Leaders panel discussion
- Ethics Pre-Assessment
- Federal Requirements – Closing PROMISE
- Information – Access vs Rights
- Ethics in Practice
- Where Do We Go from Here – Ethical Issues for ASPIRE
- Ethics Post-Assessment
- Personal Highlights
- Yearbook & Milestones
- Disassembling the Therapeutic Relationship
- What to Do Now – Moving Forward
- The Evaluation Extravaganza Continues
- Performance Measures – Implications to PROMISE
- No Cost Extension Update – Closing ASPIRE with Fidelity

Staff Appreciation

While not a formal training area, staff appreciation strategies can encourage commitment to the project, buy-in to procedure, boost morale, and create a sense of belonging and team cohesion. Therefore, as part of the training program, the APL team incorporated staff appreciation techniques as a regular feature of the training plan.

Individual and team awards.

Awards were given to ASPIRE staff on two occasions. The first celebrated the completion of the enrollment phase of ASPIRE and was presented during an All-ASPIRE training week. Awards[1] were given to individuals for excellent work in areas such as data entry, customer service, and positive attitude. A team award was also presented to one state for outstanding teamwork. While many staff members received individual awards, everyone in attendance also received an award for assisting ASPIRE in reaching the enrollment goal.

[1] See Appendix B

The second set of awards[1] were given during the final All-ASPIRE training in Spring 2018, to recognize the different groups of staff members, their contributions, and commitment to the project, based upon their length of service in ASPIRE.

Yearbook. The ASPIRE Yearbook[1] was a printed and bound volume showcasing photos and favorite quotes from ASPIRE staff members, as well as group photos from All-ASPIRE trainings. The goal of the Yearbook was to provide staff with a keepsake from ASPIRE that recognized every individual, past and present, who gave their time and effort to the project.

The Yearbook was also intended to give a personal glimpse of each ASPIRE staff member, beyond their personas at work. The Yearbook was presented to all ASPIRE employees at the Spring 2018 All-ASPIRE training.

Spotlights. Taking a cue from "Employee of the Month" strategies, the ASPIRE Spotlights were used to highlight and recognize each ASPIRE employee, help everyone get to know each other, and find common ground and interests in unexpected places. ASPIRE staff were given the opportunity to complete an "About Me" style questionnaire. Answers from these questionnaires were placed on individual posters – one per staff member. Utilizing pictures to coordinate with questionnaire answers, as well as a personal photo chosen by the staff member, these Spotlight posters were placed around the main training room during the Spring 2017 All-ASPIRE training week.

In addition to showing staff appreciation, the Spotlights also provided an intentional distraction during training breaks and helped spark conversations between ASPIRE staff members. At the end of the week, staff were allowed to take their poster home, and Case Managers were encouraged to make similar posters with youth on their caseloads.

Team highlights. Team Highlights were a standard feature of every All-ASPIRE training. During each training week, every state team, as well as APL and the Evaluation Team, presented material to the rest of the attendees. In some cases, teams could choose their topic or area to highlight. In other cases, teams were given a short list of potential topics and asked to pick from the list.

Team highlights typically focused on special projects, interesting or unusual cases, or updates on work specific to each site. Highlights often included visual aids, multiple speakers from each team, and at times music or sound recordings. These highlights gave teams the opportunity to work as a group to devise a presentation to showcase their state, their staff, and their ASPIRE families.

Fidgets. In order to facilitate learning and provide staff with a physical outlet during training sessions, Fidgets were incorporated into most All-ASPIRE training weeks. Fidgets were chosen for their ability to assist staff with learning during training sessions and which could subsequently be used with ASPIRE families. Fidgets provided staff with additional tools and ideas, and they were encouraged to incorporate these into their interactions with their ASPIRE families upon returning to their home states. The items used for fidgets varied with each training week, but generally were small and easily manipulated, such as pipe cleaners, puzzle cubes, and silly putty.

In addition, beginning in Fall 2016, staff were encouraged to release energy and achieve "brain breaks" during long training sessions through the use of Coloring Pages[1]. These were small (4x6), printed, black and white images. Staff were provided an array of image options – varying with each All-ASPIRE week, and given coloring tools (e.g., pencils, sharpeners) that could be used to draw or color during sessions. This format offered an opportunity to attend to the presented topic, without taking away focus from the training /presenter. Oftentimes, finished images were placed around the training room, to show off the artistic talent and creativity of ASPIRE staff.

Activities and games. Beginning with the Fall 2014 All-ASPIRE training, activities and games were included in each training week. These ranged from "getting-to-know-you" activities, group tournaments, and topic-specific games. Including these activities in All-ASPIRE training weeks served several training purposes:

- They connected to concepts woven throughout All-ASPIRE training weeks, and helped emphasize key points in a fun, engaging manner
- They provided a mental break from formal training sessions, to allow staff a chance to process information
- They promoted team-building, light-hearted competition, and teamwork
- They often included activities that Case Managers could implement with ASPIRE families
- They provided staff with an opportunity to share facets of their personalities not typically seen in traditional training sessions, allowing them to get to know one another better and improve morale and camaraderie across states

Staff input. The ASPIRE training plan recognized the diversity and variety of backgrounds of ASPIRE staff. Adult Learning Theory concepts were incorporated, including encouraging staff to use their experience and knowledge to assist with training topics/sessions. Staff input was provided in several ways:

- At the beginning of the project, staff were given the opportunity to join ASPIRE work groups and provide input on ASPIRE procedures and processes.
- APL formed committees to assist with the planning and topic selection for the All-ASPIRE training weeks from 2015-2017. The planning committee members changed with each All-ASPIRE training, to let others serve and contribute.

[1] See Appendix B

Committee members were role-diverse, allowing the planning committee to receive input from Case Managers, Site Coordinators, Evaluation Team members, and others.

- ASPIRE staff members were asked to present training or assist the training team on specific topics for which they had a pre-existing knowledge or expertise. Their work on these trainings took place both during All-ASPIRE training weeks and through webinar sessions. Topics varied, but included subjects such as cultural competency, benefits planning, and releases of information.
- Staff Forums were facilitated by the ASPIRE Trainers. This online setting provided a voluntary place for Case Managers and Support Staff to discuss with colleagues their concerns, ideas, and questions, and receive peer feedback and support away from direct supervisors. In some cases, Case Managers facilitated the group, in place of the Trainers.

Question box. The goal of the Question Box system was to allow staff to ask questions, make comments, and feel like they were being heard from "management." During All-ASPIRE training weeks, Question Boxes were spread around the room, along with index cards. Staff were able to ask questions without having to interrupt a presentation. It also allowed staff the opportunity to write down and submit questions as they occurred, instead of trying to remember to ask at a more appropriate time. The Question Box system was also intended to serve those who were uncomfortable asking questions in front of a group, as questions were submitted to the box anonymously.

The Question Box was implemented early in the project and evolved very little throughout. Initially question boxes stood at the front and back of the main training room. Later, individual boxes were placed on each staff table in the training room, to provide easier access and greater anonymity. At the end of each training day during the All-ASPIRE week, time was set aside to read aloud the questions submitted and for the entire group to receive the answer. This allowed for better communication, as information did not need to pass through multiple people, and instead came straight from the source. It also allowed staff to ask follow-up questions to seek more clarification if needed, and to offer suggestions where appropriate.

Playing off the literal question boxes, the ASPIRE website offered a similar format, allowing staff to ask a question electronically at any time, not just during All-ASPIRE training weeks. Questions submitted through the Online Question Box were forwarded to the APL team, and responses were provided by the most suitable APL team member. If the question was submitted anonymously, APL shared the question and answer with all ASPIRE staff. If the person submitting the question identified themselves, a response was sent to the individual, and shared with all ASPIRE employees if appropriate.

Training evaluation.

ASPIRE staff were encouraged to provide feedback to the training staff following training sessions. Feedback was solicited in a variety of ways, including:

- following most live webinar sessions, in the form of anonymous poll questions;
- on some recorded modules, following the knowledge check or quiz;
- through a written Training Evaluation form[1] given during All-ASPIRE training weeks, covering each session, as well as peripheral items, such as general suggestions and topics they'd like to see next.

Training List

Each training developed in/for ASPIRE served a specific purpose and function. At times the purpose was a short-term knowledge gain, in other cases the information was important over the entire duration of the project. The following table provides a summary description for each training provided to ASPIRE staff, when it was presented, and the purpose thereof. Unless otherwise noted, the training course and materials were developed and presented by the ASPIRE Trainers and/or the APL team.

January 2014 – December 2014
Orientation to ASPIRE The first training created for ASPIRE, detailing the PROMISE grant and general setup of the ASPIRE Consortium. Initially, this pre-recorded training was shown in full during the inaugural All-ASPIRE Training in April 2014. Later, it was split into several individual modules, and used as an introduction training for all new staff. The individual modules are described below. Each new employee was required to begin their ASPIRE onboarding training with these modules, and then asked to pass knowledge checks with each and complete a training evaluation at the end: • ***ASPIRE Introduction*** – A general description of the purpose of this training and what to expect. • ***Beginnings*** – A summary of the PROMISE Initiative and how ASPIRE was formed. • ***Consortium*** – A description of the benefits and challenges faced by the ASPIRE consortium. • ***Design*** – Introductory information on how ASPIRE is set up; the project design and structure. • ***Team*** – A summary of the teams within ASPIRE, and their individual roles and responsibilities.

[1] See Appendix B

• ***Interventions*** – An explanation of the services offered to youth and families assigned to the ASPIRE Services group. • ***Blueprint*** – An introduction to ASPIRE's recruitment and enrollment process. • ***Impact*** – A summation of the expected outcomes from implementing ASPIRE.
Human Subject Research Training (HSRT) An online training series mandatory for all ASPIRE staff prior to having access to AIMS or working with families. This training series was required by the University of Utah Institutional Review Board and covered topics such as general IRB regulations and the review process, assessing risk to participants, avoiding group harm, conflicts of interest, cultural competence and others. ASPIRE staff completed HSRT soon after hire and were required to pass each module in the series with an 80% score. Additionally, each HSRT completion was valid only for a set time period, typically three years. Staff were required to renew their HSRT prior to the expiration date by completing a refresher series. HSRT completion was monitored closely throughout the project, to maintain compliance with the IRB. Staff late in renewing had access removed from AIMS until the refresher course was completed.
Project Promotion Guide and Checklist A step-by-step Promotion Guide and Checklist[1] on conducting promotion activities for ASPIRE staff. The guide covers aspects from researching the agency with whom you will be meeting (to individualize promotion content to the audience), to preparing for the presentation (including personalizing the promotion PowerPoint and gathering needed equipment/materials), and finally presenting to community members, using the following training/promotion materials: • Introduction to ASPIRE Promotion Video – This recorded training was developed with community partners and agencies in mind, as an introduction to ASPIRE. The video was shown at promotion events and activities during ASPIRE's promotion/recruitment phase, and included brief summaries of PROMISE, the ASPIRE Consortium, and the enrollment process and needs. • Promotion PowerPoint[1] – A short PowerPoint presentation used to help guide each promotion activity, to ensure fidelity between sites and staff, while also allowing for individualization to a specific audience. This PowerPoint was used in conjunction with the Introduction to ASPIRE Promotion video.

[1] See Appendix B

- Promotion Handout[1] – A note-taking handout incorporating items from the ASPIRE Promotion video, given to attendees at promotion activities.
- Promotion FAQs[1] – A document containing many commonly asked questions by agencies and community partners, and the answers ASPIRE staff could use to prepare for promotion events and when discussing the project with others.
- Promotion Quick Reference Guide[1] – A two-page guide with screenshots showing the step-by-step process of entering promotion information into AIMS.

Recruitment and Enrollment Training Series

This training series consists of a short introduction and seven separate training modules covering the process from recruitment, to enrollment, and through random assignment. The training series goes over each step listed on the Recruitment to Random Assignment flowchart[1].

The modules were recorded for staff viewing, and were not presented in a live, in-person format. Accompanying the modules were Quick Reference Guides[1] for specific areas (e.g., Enrollment, Random Assignment). ASPIRE staff were required to complete the series and pass a quiz at the end of each module, until the enrollment period ended. Staff hired after the enrollment phases ended were not required to complete these modules:

- ***Introduction: Recruitment and Enrollment Procedures*** – This module described specific considerations related to recruitment, enrollment, and random assignment, as well as requirements for completing the Recruitment and Enrollment Training Series.
- ***Recruitment: Identifying and Contacting Youth*** – A two-part module providing a complete description of the four pieces to recruitment: identifying eligible participants, initial contact of youth and families through promotion and SSA lists, follow up conversations and meetings, and documenting and recording all activities related to recruitment actions.

  This training provides specific procedures for the recruitment process, tutorials for documenting recruitment and promotion activities in AIMS, and information related to privacy and confidentiality.
- ***Enrollment: Consent and Information Gathering*** – This module describes the process and procedures used for scheduling enrollment meetings and a tutorial for documenting such in AIMS. An introduction to the multi-step enrollment process is also included.

  > ***Step 1 Informed Consent*** – A description of the first step of the enrollment process. ASPIRE procedures are discussed for obtaining informed consent from participants. The module provides a summary of what informed

consent is and its importance, as well as how to conduct this step of the enrollment meeting using the Enrollment Visual Aid[1].

Step 2 Baseline Survey – This module provides a description of the intent of the baseline survey and the parent/guardian questionnaire. The training covers the different sections within the survey, preparation before the survey, and instructions for administering the survey. Survey procedures are discussed, and an AIMS tutorial is included. Baseline Survey Cue Cards[1], referenced in the module, were developed to assist staff conducting the survey.

Step 3 Data Collection – This module describes completing the Enrollment Meeting Data Collection instrument in AIMS, closing the enrollment meeting, and finishing the enrollment process. ASPIRE procedures for the instrument and an AIMS tutorial are included. The training also directs staff to the Paper Storage and Disposal chart[1] in the procedure manual, to ensure secure storage of enrollment documents.

- ***Random Assignment: ASPIRE and Usual Services Groups*** – A description of the seven steps required to complete the random assignment process using AIMS and the Random Assignment System (RAS). Tutorials for random assignment via AIMS and RAS are shown in this training, along with tips for completing this requirement. The training also detailed the requirement for several practice sessions by ASPIRE staff, before formally engaging in the recruitment/enrollment process, and directed staff to the Timelines graphic[2] and the Recruitment to Case Manager Assignment table[1] in the procedure manual.

Intake and Assessment

Recorded training module covering the initial process to schedule and conduct the Intake Meeting, and record information from that meeting in the Intake and Assessment instruments in AIMS. AIMS tutorials were included. The module also references the Discussion Starters[1], a document developed to assist in facilitating meetings, engaging families, and asking open-ended questions to aid in case management.

Planning and Goal Development

A description of the case management planning and goal development process. This recorded module provides a step-by-step guide on developing goals with the family during case management meetings. Topics covered include: meeting preparation, identifying

[1] See Appendix
[2] See Appendix B

possible goal topics, discussing possible goals with the family, writing goals together using SMART criteria, and documenting developed goals in AIMS (with AIMS tutorial).

Acceptable Use of IT Resources This recorded training module covers basic information technology, and what is allowed and expected when using IT resources within ASPIRE. Topics include Acceptable Use policies, viruses/spyware, proper use of email, data storage, and security violations. ASPIRE staff were required to complete this training as part of the onboarding process, and a passing score was required prior to receiving access to AIMS. They were also required to repeat this training annually, including signing and submitting the "*ASPIRE Information Technology Resources Acceptable Use Agreement*" form.
Security for Personally Identifiable Information (PII) A two-part recorded training module describing what is meant by PII, the potential ramifications for disclosing PII, and ASPIRE's Security Procedures for PII (i.e., prevention, awareness, protection, incident management). ASPIRE staff were required to complete this training as part of the onboarding process, and a passing score was needed prior to receiving access to AIMS. They were also required to repeat this training annually.
SSI and Children – Considerations An overview of SSI benefits, eligibility, resources and assets, earned and unearned income, and work incentives. This training was provided by Margot Dana (CWIC, Utah Work Incentive Planning Services) in a live webinar format, and attendance was mandatory. In addition, the webinar was recorded and required for all newly hired ASPIRE staff.
ASPIRE Work Groups This recorded training was optional for those who desired to gain a better understanding of the different work groups utilized by ASPIRE in its first year. The short module covered the specific purpose and responsibilities of ASPIRE's seven work groups: Operations, Youth Interventions, Parent Interventions, Case Management, Recruitment & Enrollment, Community Interventions, and Management. The training also included a demonstration of Wiggio, the website used by the work groups for communication and sharing of documents.
January 2015 – December 2015
Ongoing Case Management A two-part recorded training module focused on conducting case management with youth and families within the ASPIRE framework. The module covers areas such as the monthly meeting procedures, ongoing communication with families, working with community partners and schools, and recording information in AIMS. A tutorial is included for data entry and documentation in AIMS related to case notes, assessment entries, and SMART goals.

Case Management Cycle A recorded training describing the cycle of ASPIRE case management. The module goes over the six steps of the cycle: Review, Identify, Connect, Follow Up, Assess, and Update AIMS. The module provides an AIMS tutorial to demonstrate finding needed information in AIMS, as well as documenting in the appropriate AIMS instruments. In addition to the recorded module, a Case Management Cycle graphic[1] was developed to show all parts of the cycle, with short descriptions of each, to assist case managers. This graphic was provided to all ASPIRE staff in a full-page version, to be placed in their office/desk area. A card-size, laminated version (Case Management Meeting checklist[1]) was also created, to give case managers a portable option.
Fidelity to Project Design This training was presented during a Training Tuesday webinar. The presentation focused on the "Fidelity Checklist" – an informal set of procedures and practices that combine to assist the project in maintaining fidelity. The training included information relevant to the ASPIRE performance measure and the formative evaluation. The training looked at putting the work done for ASPIRE into the context of PROMISE and evaluation and the big picture view. It was offered live and was not recorded. It was also not a required/mandatory training.
AIMS Redesign AIMS, the database system used by ASPIRE, was rolled out in 2014, and it received an update in 2015, after ASPIRE staff were able to use it and provide feedback on its functionality. The AIMS Redesign training focused on informing ASPIRE staff of changes made to AIMS, showing before and after comparisons of specific instruments and data fields, and providing background and rationalizations for the changes that were made (and for those that were requested but not made). This training was provided in webinar format and was required for all ASPIRE positions. The webinar was offered on multiple days and times, allowing staff to choose a time to participate that worked with their schedules. The webinar was also recorded, and new ASPIRE staff were required to complete the recorded training module and quiz as part of their onboarding process. The Redesign Summary handout[2] encapsulated all the changes made and was provided as a reference source to staff.

[1] See Appendix B
[2] See Appendix B

Redetermination at Age 18 Webinar focused on the SSI redetermination process to determine whether an individual turning 18 years old meets the requirements for SSI as an adult. The webinar discussed the medical review and the non-medical review that takes place during the redetermination process, as well as how to handle decisions made, and the appeal process. The webinar was presented by Van Tai, SSI Technical Expert (South Jordan, UT). It was recorded and made available to ASPIRE staff on the ASPIRE website.
Youth Employment Webinar focused on the Youth Employment intervention. This training provides some historical context for how the intervention came about, the expectations for ASPIRE youth and employment, ASPIRE performance measures, and definitions and examples for the Awareness-Exploration-Preparation-Employment process.
ASPIRE Release of Information Webinar training covering the ASPIRE release of information form (“*Authorization to Release/Exchange Information*”). This training provides information on how ROI forms are used, procedures related to PII and confidentiality and releases of information, and step-by-step instruction for completing the ASPIRE’s form. Examples are provided. The training was presented live by Barry Gravatt (South Dakota ASPIRE Case Manager), and the APL team. The webinar was recorded and made available to ASPIRE staff on the ASPIRE website. It was also required for all new staff.
Independent Living Assessment This training focused on the variety of topics included under independent living, such as housing, transportation, finances, legal rights, assistive technology, healthy living, and recreation. The presentation served as a broad overview of topics ASPIRE staff could use to discuss with youth and families, and how to connect these topics to assessment and future goal planning. This training was offered live and was not recorded. Attendance was not required or mandatory.
January 2016 – December 2016
Assessment, SMART Goals, and Task List Process This training series was initially provided during three sessions at the Fall 2015 All-ASPIRE training. However, based upon feedback during that session, the trainings were updated and recorded and provided to staff beginning in 2016. All current and new ASPIRE staff were required to view the recorded modules and complete the knowledge checks. Staff were also asked to repeat the training series in 2017, as a refresher.

The trainings were recorded as separate modules in a series, to be completed in the following order: (1) Assessment Process, (2) SMART Goals Process, and (3) Create a Task List.

- ***Assessment Process*.** This training module focuses on the importance and value of the Assessment instrument in AIMS. The training discusses the value of the Assessment as viewed on a continuum and offers a series of questions to ask to determine if the Assessment is being used to its full value.

  Several handouts were created as a complement to this training. These include Assessment Takeaways[1] – a document listing the key points of the training with a place to take notes, Assessment Review[1]– a graphic showing the important questions to consider for the Assessment value, and Case Notes to Assessment handout[1] – a tool showing how to take information from case notes and transfer it to the appropriate domains in Assessment, using actual case notes from in AIMS as examples.

- **SMART Goals Process.** This training module focuses on writing SMART goals that relate to the youth and family. The training discusses using information in the Assessment to help determine goal possibilities, regularly reviewing and updating goals, adjusting them as needed, and aligning goals with intervention opportunities, and intervention opportunities with goals. The training poses several questions to help staff get on track with goal writing.

  Two handouts were utilized with this training. The first, SMART Goals Takeaways[2], lists the four main points of the training, with notetaking space as well. The second, SMART Goals Review[1] is a simple flowchart with questions to assist with goal development.

- **Create a Task List.** The final module in this series focuses on developing a task list for SMART goals, to make them easier to work on and accomplish. The training provides information on the value of tasks, how they differ from goals, and the importance of creating simple, progressive task lists for ASPIRE youth and families. Step-by-step directions for creating a task list are provided.

  Like the other modules in this series, this training included several handouts to assist with information retention. The handouts include a note-taking sheet listing the eight key takeaways from the training (Task Lists Takeaways[1]), a simple graphic showing the steps needed to create a task list (Creating a Task List[1]), and a flowchart with questions staff can ask themselves as they work on tasks lists, to make sure they are on the right track (Task List Review[1]).

[1] See Appendix B
[2] See Appendix B

Interventions in AIMS This documentation-focused training provided instruction on how to complete the intervention subsections in AIMS. Staff were provided with a case study scenario in advance (Interventions in AIMS scenario[1]), and the training went over each action in the scenario, with documentation demonstrations in AIMS. The information provided also included tips and suggestions for making the process easier, as well as things to consider or to be aware of with specific AIMS data fields. This training was originally provided in webinar format and was required for all ASPIRE staff. It was also recorded and included in the onboarding list for all new employees. Additionally, staff were required to repeat the recorded module in 2017, as a refresher course to address data entry errors and help overcome the natural tendency to occasionally drift from established procedure.
Youth Employment in AIMS This supplemental training was provided in the month following *Interventions in AIMS*. This training was also documentation-focused and gave instruction on completing the Youth Employment intervention subsections specifically. (Youth Employment was omitted from the earlier training and reserved for its own session because of the complexity of the material and the struggle staff had previously shown in this area.) Staff were provided with a case study scenario in advance (Youth Employment in AIMS scenario[1]). Each action in the scenario was covered, with AIMS demonstrations of the material. Initially provided as a mandatory webinar, the training was also recorded for new staff. Staff were required to repeat the recorded module in 2017, as a refresher course to address data entry errors and help overcome the natural tendency to drift somewhat from set procedure.
Action Plan, Federal Update, and Section 301 A compilation training covering common questions, items to review, and new updates related to the ASPIRE Action Plan, Section 301, and the federal landscape. This session also provided AIMS screenshots and instruction for documenting in data fields related to education and employment. Staff were directed to the ASPIRE website and shown the Section 301 documents listed in the Staff Toolkit. Staff were also provided with instruction for understanding and assisting with the Section 301 / Redetermination paperwork. This training included a Q&A session at the end. Originally presented as a webinar, the training was also recorded for the ASPIRE staff website.

[1] See Appendix B

Release of Information – Addendum This training served as a supplement to the original Release of Information training provided in 2015. Although a more general version of this training was presented during a mandatory webinar in May 2016, updates and revisions were made to the content, and a new recorded module was created for all employees to watch. This training focused on procedures for Releases of Information for youth in ASPIRE turning 18-years-old. The procedure manual addendum was presented, and staff were given information on the changes and content in the addendum. To assist staff with their understanding of ROI's, and whether a new ROI was needed for each ASPIRE youth, a decision-tree graphic was created (ROI Procedure Check – Decision Tree[1]). The training module went over each step in this flowchart and provided guidance on using the graphic to help determine the ROI needs for each SID.
Alternative Delivery of Interventions This training discussed information related to the Parent Training, Self-Determination, and Financial Education interventions. A summary was given on the value of in-person interventions with a provider. Alternative intervention delivery options were then presented, including online live training, provider material, recorded training, and Case Manager delivery. Procedures for providing alternative delivery of interventions to ASPIRE families were shared, as well as a brief demonstration of documenting such in AIMS. Suggestions were given for encouraging in-person attendance in ASPIRE interventions, while using alternative delivery as "teasers" for the in-person options when needed. This training was presented as a webinar and recorded for the ASPIRE staff website for current staff to review as needed and for new employees to complete. Staff were offered a copy of the material presented (Delivery of Interventions handout[1]) use as a reference.
Building and Using Reports Webinar focused on using AIMS to create reports to assist with case management, site coordinator responsibilities, and administrative tasks (e.g., mailings). The training provides information on the purpose of reports, the four steps to create a basic report, and ways to filter and tweak reports to make them more functional. The training included an AIMS tutorial and a Q&A portion. A handout of the material was also provided to staff (Building and Using Reports in AIMS[1]). The webinar was recorded, and new ASPIRE staff were required to complete the recorded training module and quiz as part of their onboarding process.

[1] See Appendix B

Face to Face Meeting and Release of Information This training focused on answering questions from the Spring 2016 All-ASPIRE training. Content centered around describing what a face to face meeting entails, and what to do about releases of information when the youth turns 18. This was a required training, presented on a Training Tuesday webinar, as well as recorded for additional viewing. Presentation slides[1] were offered to staff as a resource handout.
Referrals to Non-ASPIRE Services This was a required Training Tuesday webinar. The presentation, provided by Sara McCormick (Principal Investigator), focused on helping connect families to existing services and supports in their communities – services not included within the ASPIRE interventions. This session also discussed some changes to fields in AIMS to help with recording referrals to the non-ASPIRE services.
MPR Activity Log This was a short training introducing the MPR activity log – an activity which all ASPIRE (and PROMISE) staff were asked to complete. This training was presented in a webinar format for Training Tuesday and it was mandatory for all staff. Content focused on discussing some of the work done by MPR, specifically their work conducting a comprehensive outcome evaluation of PROMISE, including the activities within ASPIRE (e.g., case management, evaluation, training, budget).
IDEA & FERPA: The Intersection at Age 18 A Training Tuesday webinar presented by Ron Hagar (Senior Staff Attorney, National Disability Rights Network). The focus of this training was on the intersection between IDEA and FERPA when a child turns 18. Discussion included the federal laws that are in place to protect the rights of both a child and parents, and their implications as the child ages. This training was required for all ASPIRE staff.
January 2017 – December 2017
AIMS Updates A recorded training module required for all staff covering a review of recent changes made to the AIMS database on the Case Management Contacts, Assessment, and Address and Phone Number instruments. This module discussed why some changes were made, and the value and purpose of each new item. AIMS demonstrations were given for each new item updated. The AIMS Updates handout[1] was provided.

[1] See Appendix B

Case Reviews and More A webinar presented live and recorded for later addition to the ASPIRE staff website. This training covered multiple items related to case reviews, including: the ASPIRE Case Review Procedures and Instructions[1], the importance of case reviews, the different types of case reviews taking place, and how to use case reviews to improve documentation. The presentation also connected case reviews with ASPIRE performance measures and the Action Plan.
Section 301: The "How To" A Training Tuesday webinar presented by Barry Gravatt (South Dakota Case Manager) and the APL team. This training focused on clarifying some of the confusing aspects of the Social Security work incentive Section 301. Topics covered include the Continuing Disability Review process and Redetermination at Age 18. This training was mandatory for all staff.
Help You and Your Families – Compassionate Case Notes This training covered how completing effective case notes in AIMS can guide Case Managers' work with youth and families. Content included identifying how we communicate and learning effective strategies to support ASPIRE families. This was a mandatory Training Tuesday webinar.
Case Review Conversations A short training discussing an addition to the case review process – Case Review Conversations. The module provides explanation on why the Conversations addition is important and needed, what the new process entails, and how it will be implemented. This module was recorded and required for all current Case Managers and Site Coordinators; it was not required for other ASPIRE positions.
January 2018 – December 2018
What's Really Private and Protected A live webinar training covering personal information and confidentiality. This training was developed to address an increase in potential data breaches. The session included a review of the wide range of personal information and who may have access to it, as well as tools staff could use to protect themselves and their information. Instruction and a demonstration were given on how to use encryption and password protection on documents.

This training was required for all current staff, and the recorded version was mandatory for new employees. Two documents were developed to complement this presentation: Password Protecting a File instructions[1] and Encrypt a USB with BitLocker instructions[1].
Benefits Counseling A review of the various components involved in Benefits Counseling, including acronyms used, professionals involved, and what is covered in a typical Benefits Summary and Analysis. Related performance measures were also covered. A flowchart was created to show the Benefits Counseling sequence in ASPIRE (The Flow of Benefits Counseling[1]), and this chart was reviewed during the session, step-by-step. Common issues and possible situations were discussed, and staff were provided with information on how to document Benefits Counseling in AIMS. This training was initially presented live in a webinar format and was required for all current staff. It was also recorded for all new employees to view.
What's Happening with ROI's A live webinar required for all ASPIRE employees. This training was also recorded for new staff. This training covers ASPIRE Releases of Information in the context of the No Cost Extension. Information covered included a review of how ROIs protect families, what is covered and shared with an ROI and what is not, and how to move forward with current ROI expiration dates and obtaining new forms.
What's Happening at the Federal Level A webinar training provided by Tricia Jones-Parkin (Employment Specialist, Utah Division of Services for People with Disabilities). This training covered information on important happenings at the federal level, related to youth, disability, education, and employment. The training provided insight into how items at the federal level impact ASPIRE. Items discussed include Employment First, WIOA Section 511, IDEA and Transition Age Youth, and Home and Community Based Services (HCBS) rules. The webinar was recorded and required for all new employees as part of the onboarding process.
ASPIRE and ABLE Accounts A summary of the ASPIRE ABLE Deposit Opportunity. This mandatory training was presented in a webinar format and recorded for new employees to watch. This training covers the ASPIRE ABLE Deposit Opportunity Process and how to assist ASPIRE families in setting up ABLE accounts. Staff were provided with a review of the documents created for the ABLE process and the new resource page on the ASPIRE website. This presentation also included a

[1] See Appendix B

Q&A session, to allow staff to ask more specific questions about the process and expectations.

Action Statements

This training combined a pre-recorded intro video with multiple live, simultaneous webinars. Building off sessions from the Spring 2018 All-ASPIRE training, this training focused on creating action statements for resumes, to assist staff with preparing for employment after ASPIRE. The training was only required for current ASPIRE employees and consisted of three parts:

1. Each ASPIRE employee was required to view the short intro video ("Action Statements") prior to attending a webinar session. The intro video gave the definition of an action statement and provided several examples of what they are and how to use them in resumes.
2. Staff were assigned to a specific webinar session, based upon job role (e.g., Case Managers, Site Coordinators, Support Staff). Using a list of KSAs brainstormed during an All-ASPIRE training session, each group was tasked with developing action statements for their specific ASPIRE role, that could be used for resumes.

   To assist in the group work, staff were also given two handouts. The first, ASPIRE KSAs to Actions Statements to Resume[1], was a worksheet to write down action statements from the KSA list. The second, Using Action Statements[1] provided a review on how to turn KSAs into Action Statements.

   Facilitators were chosen for each webinar and provided with detailed instructions on for how to run the webinar (Running a Webinar[1]) and how to facilitate the group work (Facilitator Directions[1]). Group facilitators included: Douglas Allred (Site Coordinator group), Jody Dettmer-Johnson, Mark Mahnke, and Travis Catt (Case Manager groups 1, 2 and 3), Sara McCormick (Evaluation group), and Chris Fosdick (Admin Support group).
3. After the webinar sessions, each staff member was required to turn in their worksheet. These worksheets were then compiled by the ASPIRE Trainers and shared with all ASPIRE staff.

Interventions in AIMS (2018)

Previous training revamped in 2018 to provide more updated information related to AIMS interventions data fields and procedures, in order to target a trouble area for ASPIRE staff. The revised version also included a handout with questions and fill-in-the-blank items, in place of the traditional quiz. This handout allowed staff to follow along with the recorded

[1] See Appendix B

module, completing items as the module advanced. The handout was turned in afterwards, and a passing grade was required.

See the original module information listed under 2016 for additional details.

Youth Employment in AIMS (2018)

Previous training revamped in 2018 to provide more updated information related to the AIMS Youth Employment intervention data fields and procedures, in order to target a trouble area for ASPIRE staff. The revised version also included a handout with questions and fill-in-the-blank items, in place of the traditional quiz. This handout allowed staff to follow along with the recorded module, completing items as the module advanced. The handout was turned in afterwards, and a passing grade was required.

See the original module information listed under 2016 for additional details.

Summary Report

Training session detailing the different components and phases of the ASPIRE Summary Report. This training provided background on why specific areas were included in the Summary Report, how the report would be used, and a general overview of the timeline and process for completing the report. Specific instruction was also provided for completing Phase 1 for the Summary Report, with training for subsequent phases promised at a later date.

This session was initially provided in person during site visits, with staff completing at least one Phase 1 during the session, as practice. The training was later recorded and made available on the ASPIRE website for staff to review as needed, and it was required for all new employees.

Several handouts were developed to assist in this training, including:

- Reports Instructions[1] – Document showing how to use the AIMS reports created for completing the different Summary Phase worksheets, with screenshots.
- Phase 1 template[1] – Word document used by staff to complete the first phase of the Summary Report process. This document included where to find the information, what information was needed, and examples.
- Phase 2 template[1] – PDF document used by staff to show what Phase 2 covers. This document included where to find the information, what information was needed, and examples.

[1] See Appendix B

- Phase 3 template[1] – PDF document used by staff to show what Phase 2 covers. This document included where to find the information, what information was needed, and examples.

Audit Process

Training session detailing the ASPIRE audit process. This training covered the reasons for auditing AIMS records, the expectations for auditing, and the background on the audit tool development. Step-by-step instruction was provided on using the audit tool, complete with visual demonstration. Staff were also given information on ways they could assist with the audit process, limit the number of edits they might receive, and comply with audit requirements where needed.

This session was initially provided in person during site visits, as a general overview for all site staff. Staff responsible for completing audits attended an additional practice session to allow an opportunity to use the audit tool with on-site support, immediate feedback, and tool-specific Q&A. The training was later recorded and made available on the ASPIRE website for staff to review as needed, and it was required for new employees.

Several handouts were developed to assist in this training, including:

- Audit Instructions[1] – Step-by-step guide on the audit process, from preparing the audit tool, completing the audit, and recording the audit in AIMS.
- Audit Tool[1] – The Excel workbook used to complete an ASPIRE audit.
- AIMS Closeout Instrument[1] – A cheat sheet with instructions and screenshots for using the new Closeout instrument in AIMS.
- AIMS Closeout Reports[1] – Document showing how to use the AIMS reports created for completing the Closeout Instrument, with screenshots.

Phase 2 Review

A recorded training module reviewing the Phase 2 process covered in a previous training session (see Summary Report). This training provides information on what needs to be done before beginning Phase 2, what is covered in Phase 2, and how to complete the Phase 2 template. Each item on the Phase 2 template is reviewed, and possible questions and concerns are discussed. In addition, the AIMS reports created for completing the Phase 2 template are reviewed, with an AIMS demonstration for accessing and using these reports. The official Phase 2 template (Word document) was also made available with this training.

[1] See Appendix B

January 2019 – March 2019
Ending Therapeutic Relationships This pre-recorded training module was developed to give ASPIRE staff tips for the coming end of the project. This training discussed the limitations of communication with ASPIRE families after the study ends, different attachment styles and how they relate to therapeutic relationships, and how these factors might impact the inevitable goodbye. Strategies were given to assist in ending ASPIRE relationships on a positive note. An infographic was developed to provide staff with self-care tips, using the TIME components discussed in the module (Making TIME for your Self-Care handout[1]).
The Final Meeting: Phase 3 and The Summary This training covered the process developed for completing the Phase 3 Template, preparing the Final Summary document for each ASPIRE family, and scheduling and conducting the Final Meeting. A graphic, Steps to Final Meeting[1], was developed to assist with the training and staff were provided with instruction on completing each step in this process. Key points in the training include maintaining uniformity in the Summary Report, while allowing for individual style and discretion in certain areas. Tips were also provided for time management, scheduling meetings, and documenting the process in AIMS. Staff were directed to begin the process with two “practice” SIDs, before continuing with their caseload. Several handouts were developed to assist in this training, including: • Phase 3 template – The official Phase 3 Template (Word document). • Summary Report (List Style) and Summary Report (Narrative Style)[1] – Two examples of completed Summary Reports, provided to give staff an idea of the expectations for the final document. • Final Summary Report template[1] – Official template used to create the final Summary Report for each ASPIRE family.

[1] See Appendix B

Part E: Considerations and Challenges

The ASPIRE training program encountered several challenges throughout the project duration. Some of the challenges were anticipated, given the nature of working in a consortium across six states. These "built-in" obstacles required the training team to reflect on the varying needs of the consortium, plan for multiple contingencies and solutions, and implement the training plan in full consideration of the complications.

However, other challenges and considerations arose that were unforeseen and required additional planning and adaptation to ensure the project moved forward. These challenges generally centered around three main topics: delivery of training, ASPIRE personnel, and communication. In some cases, the training team sought to mitigate the effects of challenges by implementing other plans, processes, and workarounds. In other cases, the challenge eventually became extinct or naturally lessened over time. Nevertheless, there were some challenges that, despite efforts from the training team, remained a problem throughout the ASPIRE project.

Delivery

One of the challenges facing the ASPIRE training program was the logistics of delivering training across the six-state consortium. This particular challenge can be broken down into several sub-issues, including challenges related to the efficacy of training methods used, the ability of the Trainers to assess training needs, and the limitations of technology in training delivery.

Efficacy of methods. The training program sought to use the most effective methods to deliver specific training topics and concepts. However, the restrictions involved in working within consortium parameters, training remotely, and reaching out to people across six states, meant that at times the method chosen for a training was not likely to be the most effective.

Although there are several areas where this was the case, one of the biggest areas impacted by the logistics of a consortium involved data entry into AIMS. AIMS training was the most effective when staff could be instructed in person, as this gave them the opportunity to practice training concepts directly in front of the Trainers and receive immediate assistance and feedback. While training on AIMS via webinar and recorded modules included examples, screenshots, and live demonstrations, the distance between trainer and trainee appeared to limit the efficacy.

Similarly, some training topics were best presented live, either in person or via webinar, but due to varying circumstances, topics were at times delivered through a recorded module instead. Recorded modules had the advantage of including a knowledge check or quiz to test understanding of material and document completion, but they did not allow for a question/answer period that would permit staff to seek clarification on specific subjects.

Additionally, the knowledge checks were dependent upon the trainers' ability to pinpoint the most important objectives of a training, but these quizzes were not guaranteed to measure true understanding or retention of the material. They also did not allow for a dialogue between the presenter and attendees, wherein the presenter could gauge the progress of a particular session and adapt as needed.

Assessing needs. Assessing the needs of the project was a vital component to creating an effective training program. The training team used a variety of means to assess the training needs of both the project and ASPIRE staff, including quizzes/knowledge checks, surveys, worksheets/assignments, evaluations, case reviews, indirect (secondhand) information, and direct discussion.

In some cases, assessing needs was a straightforward process, as new information was developed, or changes were made to procedure that each ASPIRE staff member needed to receive. However, in other cases, assessing needs became more complicated. Some of the major challenges that influenced the ability to effectively assess needs and efficacy of training included:

- Some assessment methods (quizzes, knowledge checks) measured understanding of concepts, but not retention or practical use.
- Some methods assessed participation/completion of a training (survey, evaluation, quizzes), but not knowledge or understanding of concepts.
- Some methods (surveys, evaluations) provided information regarding what staff thought they needed, but not necessarily what they *actually* needed.
- Some methods provided information, but no means to follow through (due to supervision limitations), such as indirect information and case reviews.
- Some needs were assessed, but trainers were limited in ability to meet them – such as noting concerns with individual staff members in different states.
- Some needs were assessed for some, but not all, of the project, leading to the potential for under- or over-training (burnout).
- Some required assignments connected to trainings provided assessment information. These include items such as practice scenarios for new staff. However, some assignments that relied upon the authority of supervising staff to ensure timely completion received limited support and follow through.
- In general, case reviews were the best method to gauge understanding of specific AIMS and ASPIRE procedures, but case reviews required a cooperative effort between the training team and site supervisors. Unfortunately, needs assessed via case reviews received little follow through from staff members and

Site Coordinators. Therefore, in-person, or proximity to work done, was determined to be the most effective method for assessing and addressing the needs at all levels - individual staff members, site teams, and the project.

Technology limitations. Due to the nature of working within a consortium, the training program relied heavily on technology to deliver trainings. However, training was often at the mercy of the caprices of technology and limited to what a specific platform or application might offer. For example, the GoToWebinar platform was used extensively in ASPIRE. While the platform generally functioned as intended, workarounds had to be implemented to deal with some idiosyncrasies, such as an inability to play a video with sound during the session.

Likewise, while recorded modules made up the bulk of the training courses, at times recorded modules would not function correctly, or would only function for some staff and not others. The training program evolved to account for technology limitations, but oftentimes this information was obtained through trial and error, with staff reporting problems or glitches as they attempted to complete required trainings. The training program worked to mitigate some of the problems associated with technology. This included:

- *Beta-testing new trainings* with a select number of individuals, to identify errors or bugs, and fix them before providing the training to all ASPIRE employees.
- *Anticipating problem areas and implementing plans in advance* of sharing the training with ASPIRE staff. For example, quizzes that required fill-in-the-blank answers were notorious for marking correct answers as incorrect. Therefore, the trainers informed staff in advance that any questions of this nature would be hand checked before final scoring of the quiz.
  Additionally, when a training conducted via webinar required on-screen visuals, staff were often provided with electronic copies of any material (e.g., PowerPoints, handouts) in advance, in case screen-sharing capabilities were limited or malfunctioning.
- *Introducing new tools.* For instance, early trainings were recorded using computer headsets. Oftentimes the sound was distorted, and background noise was evident and distracting. To address this, special microphones were purchased, and audio recordings for trainings were produced in closed, quiet rooms using the microphones. Special software was used in conjunction with the microphones to enhance the sound quality (e.g., Audacity).
  Additionally, mid-way through the project, a new computer was purchased to assist in handling the large files created using the Camtasia program. Prior to this, working on these videos was difficult as the system would repeatedly freeze, shutdown, and take hours to produce the final product.
- *Utilizing additional platforms.* At times Camtasia and/or the ASPIRE website were not sufficient for the technology needs of a particular training. In these cases,

trainings were placed on a closed YouTube account and links were provided directly to staff for viewing. This most often took place with recorded sessions for All-ASPIRE training weeks, as the files were too large for the website and created buffering issues for staff.

Personnel

ASPIRE employed a diverse group of individuals. Due to the nature of working with a large group of people, and because the research study covered many years, an array of challenges and considerations arose from the personnel side of the project, including the strength of case management skills, the onboarding process and new employees, training to fidelity, and staff integrity.

Case Management.
ASPIRE staff came from a variety of backgrounds (e.g., education, social work, child protective services, juvenile justice), with differing levels of experience. This diversity served ASPIRE well in many instances. However, from a training perspective, it created a few challenges, most notably within the Case Manager role.

At the outset of the project, there were no plans to train new hires on how to case manage, and instead the focus was on ASPIRE case management specifically, such as best practices within ASPIRE procedure and AIMS. However, it was found that several trainings were needed that focused on the general responsibilities and role of a Case Manager, due to the wide disparity in case management experience among ASPIRE Case Managers. Because this was not included in the plan at the beginning, some backtracking had to take place, to account for deficits in understanding discovered through reviewing work in AIMS.

Onboarding and New Employees.
In order to encourage fidelity across the consortium, one aspect of the training plan was to require that all staff, at all levels, receive all training. This was a simple way to monitor training, track completions, and discover areas of weakness. However, as the project progressed, and more trainings were developed, the list of available and required trainings expanded in kind. ASPIRE experienced staff turnover throughout the study period, and new employees were introduced to the training program regularly. The challenge in this regard was to maintain the training fidelity implemented at the beginning of ASPIRE, while also ensuring understanding of concepts, procedures, and expectations.

New employees needed to complete a great deal of work to get up to speed on the project, before starting the regularly assigned duties. This was particularly the case with staff hired in the final 1-2 years of the project. They completed an overwhelming number of training courses in a short period of time, and this overexposure to ASPIRE information was not necessarily the most effective training method. However, due to the time constraints of the study, coupled with the need to get specific roles, such as Case Managers, a caseload quickly to ease the burden of other employees, the training program was constrained in adapting a new method.

One important consideration connected to the challenge noted above was the difference in performance/understanding from new employees compared to staff with the project for some time. ASPIRE evolved over the course of the project and many changes and additions to procedure were introduced across time. Evaluation of the training program found that many new employees had better performance in specific areas, such as AIMS, because they did not have to replace previously learned information with new material.

Training Fidelity. One challenge for the ASPIRE training program was to maintain fidelity, while also acknowledging and addressing individual differences and needs. For example, as noted earlier, some ASPIRE staff had extensive experience working in their field and needed very little direction. Others were new to either the role or the type of work in general and required additional assistance.

Likewise, some staff grasped ASPIRE concepts quickly, and their work demonstrated understanding of these concepts, indicating additional training in these areas was not needed. In contrast, some employees had a difficult time understanding or remembering important ASPIRE procedures and practices and needed more assistance from the ASPIRE Trainers. This disparity was at odds with the “all training for all staff” philosophy adopted at the beginning of the project.

The training program worked to adapt to these challenges by working individually with those needing more support, identifying training that would benefit all staff, either as basic reminders, or specific direction, and finding ways to make the training on repeat concepts more interesting and engaging.

Staff Integrity. Effective training is a partnership between the trainer and the trainee. For a training to be successful, staff receiving the training need to be invested in retaining and implementing the material. One of the challenges in ASPIRE was the varying levels of engagement and investment amongst the ASPIRE staff members. An example of this was evident in webinar participation. In general, live webinars were typically the standard training method. Oftentimes these webinars included visuals, such as PowerPoints, and handouts. In some cases, the documents were provided to staff in advance, but in other cases it was not possible or appropriate to do so. This created a challenge for staff who chose to attend the webinar via phone only, rather than using the URL link. Furthermore, in some cases, staff attended required trainings while traveling/driving to other appointments, with subsequent minimal participation. This created a gap in learning between those simply attending and those making the effort to learn and understand the material.

Participation and commitment to learning via the recorded training modules provides another example. Some staff members regularly completed each training module in full, watching the presentation and completing knowledge checks in a manner that indicated understanding. Other employees tried to skip the presentation and attempt to answer quiz questions without attending to the training material first. Training reports were able to show not only when a training was passed with the required 80%, but also how much time was spent completing a module, and the portion of the recorded video that was viewed. This allowed the training team to identify areas where the integrity of training completion was lacking.

For in-person trainings, such as All-ASPIRE weeks, examples of staff engagement and integrity (or the lack thereof) were observed via participation in discussions (asking questions, providing comments), accuracy in assignments given, following instructions for specific sessions or training tasks, and limiting distractions during presentations, such as side talk.

Several methods were used to mitigate the challenges posed by staff training integrity, including:

- Staff were required to watch recorded trainings in full, with the report showing a viewing score of 100%, in order to be marked as completed. However, this requirement was dependent on the reports, and it was certainly possible to allow the training to run in the background, without formally paying attention to the content. See Appendix A for data outcomes related to recorded modules.
- The Trainers placed knowledge checks and quizzes at intervals within the recorded modules, as opposed to at the end only, to ensure some level of interaction from staff members throughout.
- Training Module instructions[1] were developed to provide direction for ensuring recorded modules were accessed correctly and attempts were logged by the system.
- The team aimed to motivate staff by indicating how a training would benefit them and their work.
- Trainings were planned with adult learning techniques and learning styles in mind, to reach all individuals within the broader ASPIRE audience. The team made the effort to produce trainings that were interesting, engaging, and entertaining.
- A variety of training methods and presenters were used to ensure trainings did not become static or "routine."
- Feedback from previous evaluations and surveys was used to produce and offer training requested by staff to show that the training team was listening to their needs.

[1] See Appendix B

- For All-ASPIRE trainings, seating was assigned by table, and seating assignments changed each day. This allowed the training team to influence the environment, creating table groups that were a combination of more experienced staff with newer hires.
- Other aspects were considered as well, when developing seating arrangements, including the presentations and corresponding group work occurring on each training day, and the attitude, personality, and personal investment of each staff member, which helped the training team form diverse peer groups to aid in training integrity.

In addition to the above, staff integrity was challenged at times, as offers of individualized assistance from the trainers were rejected or ignored. As part of the training program, the trainers acted as "on-call" subject matter experts on AIMS and ASPIRE procedure. Staff were encouraged to seek help often. When assessments showed that individual staff were struggling in specific areas, the trainers reached out to the staff member and/or the Site Coordinator to offered individualized training and assistance. Some of the offers included:

- Setting up a conference call to discuss a specific case, AIMS instrument, procedure, etc.
- Arranging a live webinar session to go over specific items with screen-sharing
- Reviewing SMART goals and tasks and providing suggestions and ideas
- Reviewing specific case note entries and providing immediate feedback
- In-person or webinar "shadowing" to demonstrate concepts and observe work
- Practice sessions for recruitment, enrollment, and case management in AIMS
- Weekly review of documentation to ensure timely data entry

While some staff regularly accepted the offer of assistance, most often in the form of email exchanges or phone calls, several staff members with continuing performance concerns did not seek or accept additional assistance and were not required to participate in additional training by their Site Coordinator. This refusal for extra support and training hindered their work, and in turn created more work for their colleagues, the training team, and APL.

Communication

Maintaining good communication between entities in ASPIRE was an ongoing challenge for the training program. Communication was hampered in a few ways, most notably with decisions made, the hierarchy of authority and accountability in ASPIRE, and the timeliness of sharing information.

Decisions made.

As noted previously, procedures and processes in ASPIRE evolved frequently throughout the life of the project. Adjustments were made at different phases of the study, after new information was obtained, and through formative evaluation looking to improve the work being done. Communicating changes and ensuring that all staff were trained on new information and procedures was difficult. In some cases, challenges arose simply due to logistical factors, such as time and distance. In other cases, decisions made were discussed in management team meetings, and the information was entrusted to site supervisors to pass on to Case Managers and support staff. There were times when the information shared with staff was incomplete, misinterpreted, or misinformed, and in some cases, staff supervisors failed to share information with site staff altogether.

This communication gap created training deficits, as some staff did not implement new procedures and processes quickly, or at all, and continued completing their responsibilities in an outdated manner until further review of their work noticed the problem. Some ways the training team worked to mitigate this challenge included:

- Using Case Reviews as a training tool to reiterate important concepts, highlight commonly misunderstood items, and provide examples for how work should look.
- Wednesday's Word to the Wise was introduced, a weekly memo sent directly to each ASPIRE employee. These documents contained training tips, up-to-date information on decisions made, and reminders on past procedure. Written and sent by the Project Director, with input from the APL team, these missives provided a direct link to ASPIRE management, and decreased the possibility of misinformation.
- Identifying common areas of misunderstanding and confusion by surveying and talking with Case Managers and support staff and developing trainings to specifically address those areas.

Authority and Accountability. One major feature of a successful training program is the ability to train to procedure, evaluate performance, and provide additional instruction, corrective action, and monitoring to those struggling. A recurring challenge in ASPIRE was the inability of the training team to hold staff accountable for both training completions and corrective actions. For example, when a training module was not passed at 80%, the trainers had to rely upon the Site Coordinator to both inform the staff member and ensure that the module was retaken. At times, this process could go several months beyond the initial deadline for a training, reducing the value of the training and allowing incomplete or inaccurate work to take place in the interim.

Additionally, case reviews were an important training tool, with both positive feedback and corrective actions provided. However, the training team had no authority to hold staff accountable to making needed corrections. The hierarchy of ASPIRE and the nature of the consortium meant that Site Coordinators, as the direct supervisors, were charged with holding staff accountable. Oftentimes, problems or inaccuracies in case reviews went uncorrected and the mistakes continued to be made in future data entries in AIMS. There are many possible reasons why Site Coordinators did not hold their staff accountable – e.g., too busy, lack of knowledge, unclear expectations, lack of buy-in, lack of prioritization – but the result was that adherence to procedure and data entry in AIMS across the study time period suffered.

One particular challenge with authority, especially within the first years of the project, was communicating with Site Coordinators regarding the roles and responsibilities of the Trainers. There were instances when the training team developed a new idea or plan to assist staff with completing their work, only to have the plan disapproved and objections vocalized by some Site Coordinators, often due to concerns of Trainer authority overreach. In most cases, the teams were able to discuss the concerns and come to a compromise. However, in some cases, the plan either went ignored, was rejected out of hand, or had to be implemented with discretion. For example, the plan for the Trainers to complete case reviews was not well-received; initially, there was dissention and concern expressed by Site Coordinators regarding the trainers completing a single round of case reviews, let alone making it a regular part of the training program.

Furthermore, once it was made clear that case reviews were going to become a set part of the training plan, there was additional argument and opposition on how staff were to receive the results of their reviews. The Trainers sought to give staff individualized feedback that was private and confidential (a training necessity in order for staff to feel comfortable asking questions and seeking assistance), and to provide Site Coordinators with a summarization of the review findings for their state, e.g., how everyone was doing in general, specific concerns or areas to address as a group. Some Site Coordinators were not in agreement and sought to be provided with all case reviews completed by the training team.

Therefore, in order to begin implementing case reviews, there was a degree of "tip-toeing around" the Site Coordinators, to get the system up and running. This was the case for other training ideas as well. However, generally, once the plan or process was in place and not shown to be a hindrance or an encroachment of Site Coordinator authority, the objections to the plan desisted.

Information Timeliness**.** Related to the authority/accountability challenge, the timeliness of sharing information in ASPIRE was a regular obstacle for the training program. Trainings were developed out of a practical need for staff to receive and implement new information/procedures. However, as the ASPIRE trainers were not direct supervisors or authorities over ASPIRE staff, some concern was shared amongst Site Coordinators and Evaluation Team that the hierarchy of authority would be side-stepped, and staff would interact with the Trainers instead or in place of their direct supervisors. There was also concern that the Site Coordinators would be trained at the same time as their subordinates, thereby not allowing them to serve as a resource or authority on specific training items.

The ASPIRE training program went through some growing pains as a result of these concerns. For example, early trainings were developed into draft forms, and then presented to others in the management team for feedback, critical review, and suggestions for revision (Training Development flowchart[1]). This allowed many people to have a say and some ownership in what was being developed and how information was disseminated to staff. However, it also created some disagreements between team members when contrasting opinions were expressed and lengthened the overall production of a training.

Similarly, as the study progressed, Site Coordinators asked to receive training on subjects in advance of their site staff. In order to assuage Site Coordinator concerns about receiving information first, informal procedures and a second training development timeline were created to include scheduling a “pre-screening” training session with Site Coordinators and the Evaluation Team of all APL-produced training webinars and modules. This required the Trainers to schedule two training sessions and present twice on the same information. Furthermore, during these “pre-screening” sessions, some Site Coordinators and Evaluators would offer additional suggestions and recommendations for training revisions, which they were interested in having incorporated before site staff received the official training.

A side effect of these challenges was that the timeline for developing trainings and communicating important information to ASPIRE staff was extended, which made providing staff with up-to-date and relevant information more difficult. These informal procedures also created an extra burden on the training team as attempts were made to address concerns of all parties at the risk of diluting the training messages. Additionally, multiple sessions for the same training material created scheduling difficulties and duplication of work/time for the Trainers.

The training team worked to develop trainings quickly, to lessen some of the timeframes created by these extra steps. However, over time, Site Coordinators and Evaluators appeared to be less concerned about the training timelines, and eventually the procedures were abandoned, making additional mitigation efforts unnecessary.

[1] See Appendix B

Appendix A: Training Statistics

Training with accompanying quizzes/knowledge checks only

The following table shows data for recorded training modules that were accompanied by a computer-scored knowledge check. Other trainings were only presented live, or included quizzes with essay and short answer questions, as well as other assignments not scored by a computer system. These trainings are not reflected in the table below. Therefore, this table provides a snapshot of training scores in ASPIRE, but it is not all-inclusive and does not purport to list the data for all trainings across ASPIRE's duration.

Training Title	Average Content Viewed (%)	Average Score (%)	High Score (%)	Low Score (%)	Quiz taken / passed (# of staff)											
					1st attempt						2+ attempts					
					AZ	CO	MT	ND	SD	UT	AZ	CO	MT	ND	SD	UT
Acceptable Use *	76	88	100	0	66	40	20	18	15	26	9	6	2	2	2	5
Action Statements	63	81	100	0	11	6	4	1	4	5	7	3	2	2	1	3
AIMS Updates	70	72	100	0	16	7	4	2	6	4	7	5	2	4	1	4
Audit Process	35	70	100	0	1	0					5	2				
Baseline Survey	67	89	100	30	15	8	5	5	4	8	2	5	1	1	0	0
Beginnings	0	86	100	0	27	10	8	5	2	13	4	0	1	2	1	1
Blueprint	0	86	100	17	21	8	6	5	2	12	10	3	3	1	1	1
Case Management Cycle	65	89	100	10	24	15	9	5	5	13	7	2	1	2	0	0
Consortium	0	89	100	20	31	10	7	5	3	11	0	1	2	1	1	3
Data Collection	64	81	100	20	11	6	4	4	4	7	6	7	2	2	0	6
Design	0	77	100	0	18	4	5	5	2	8	13	9	4	2	1	6
Ending Therapeutic Relationships	80	92	100	0	17	7	6	4	4	6	0	1	0	0	0	0
Enrollment	61	78	100	0	10	6	3	5	3	6	7	7	3	2	1	7
Impact	0	73	100	20	17	6	3	3	1	5	14	5	6	3	2	8
Informed Consent	67	93	100	30	15	10	5	6	4	9	2	3	1	0	0	0
Intake and Assessment	61	78	100	10	16	8	10	4	3	5	20	9	3	4	2	9
Interventions	0	82	100	25	19	4	7	1	2	4	11	7	2	5	1	8
Ongoing Case Management – part 1	64	91	100	25	20	12	7	2	5	12	13	4	3	6	1	2
Ongoing Case Management – part 2	73	92	100	50	29	14	9	8	6	14	4	2	1	0	0	0
Phase 2 Review	59	62	100	0	5	5	2	0	0	2	13	5	4	4	4	4
Planning and Goal Development *	59	83	100	11	14	10	7	1	6	8	21	8	4	8	0	10
Random Assignment	49	77	100	20	8	6	1	1	1	2	9	7	5	4	3	9
Recruitment	57	85	100	40	10	9	5	6	4	10	7	4	1	1	0	3
Release of Information	73	88	100	20	22	6	6	7	3	5	4	1	0	0	0	1
Release of Information – Addendum *	63	88	100	20	40	20	10	10	10	14	3	3	3	2	1	2
Security for PII - part 1 *	81	93	100	0	86	51	27	23	23	36	5	3	0	0	0	3
Security for PII - part 2 *	79	89	100	0	64	35	22	17	18	24	16	9	0	3	0	7
SSI and Children	57	66	100	0	9	3	3	0	1	6	18	5	5	4	1	2
Summary Report	35	76	100	13	1	0	1		1		5	2	1		0	
Team	0	83	100	0	20	9	6	3	3	10	11	2	4	3	0	3
The Final Meeting	48	67	100	0	10	6	4	2	4	4	5	2	2	2	0	2

*** Training required annually or repeated as a refresher**

General statistics and data of trainings provided	
Total number:	
APL-produced recorded modules	36
Webinars	25
Site visits	22
All-ASPIRE Training weeks	9 8 makeup training weeks
New-hire trainings offered -	
2014	2
2015	8
2016	4
2017	9
2018	11
2019	2
non-apl presenters/facilitators	50
trainer reviews -	
case reviews	235
conversations	100
peer reviews	32

Appendix B: Training Tools

This appendix contains sample training materials and handouts created for ASPIRE. Some materials were developed alongside formal training presentations as referenced in the above report. Where appropriate, the corresponding report page number has been noted for cross-referencing. Other materials were developed independently and were not connected to a specific training. These materials were distributed informally to staff throughout ASPIRE's duration.

(Ctrl + Click on topic headers to be taken directly to listed materials.)

Onboarding

Confidentiality

AIMS

Staff Development

Recruitment and Enrollment

Case Management

All-ASPIRE Trainings

Summary and Final Meeting

Monitoring