2014 UCEDD Annual Report Webinar Transcript
April 17, 2014, 4:00p.m.-5:00p.m.

Welcome to today's webinar on the changes in the UCEDD annual report for 2014. This is Dawn Rudolph. I'm the director of UCEDD Technical Assistance at AUCD and I'm joined by Tanisha Clarke and Anna Costalas both of whom also work on the UCEDD TA Team. We are pleased to have the opportunity to talk with you today. We will present some minor changes that have been implemented in NIRS based on feedback from network members, many of you, and also based on AIDD's review of the 2013 UCEDD annual report. Indeed most of the changes are based on the debriefing and review of last year's annual report. This report was revised significantly last year based on a new logic model for the UCEDD network and the changes presented here reflect some tweaks based on experiences last year. There are minor changes and clarifications and guidance and in the annual report itself and we will show you exactly where everything is online. We can also answer any programmatic questions you may have. Before we began the presentation I want to go over a few housekeeping items. Please note this presentation is being recorded and will be archived on the webinar library and the NIRS resources page and the UCEDD Resource Center. You will certainly be able to find it.

We want this to be interactive but want to be sure you hear all the information clearly. Your lines will be muted while we review the changes but if you have questions you may type them in the chat box on the lower left side of your screen and I will address them as they come in. After we finish the presentation we will unmute you individually for the question-and-answer session and we will take questions over the phone. You will get a prompt when you are unmuted. You will hear the prompt if you have indicated you want to ask a question. This is scheduled for 90 minutes but it might not take that long to get through everything so we will finish early after we are done and you can get on with your afternoon and evening.

I am going to bring in a website, our website, and I will go through most of the information live from our website. I am hoping that this is sharing with you right now. Can someone make a note in the chat box if you are able to see the UCEDD PPR debriefing document that I have on my screen right now? Perfect.

Let's go through all the changes. We will follow this document which outlines all the issues that have been identified and the resolutions for each of those issues. This was sent with the email announcement for the webinar and is also available on the webinar event page of our website. If you have your own copy and it's helpful for you to follow along please do so. Many of you are familiar with our annual report guidebook. That is not yet updated but it will be updated in the next few weeks and that will provide an additional resource for keeping on top of these changes. We will certainly let you know when that is ready.

Let's start at the beginning, a very good place to start. Issue number one in this debriefing document has to do with the UCEDD annual report guidance. So I will switch to that screen now. This should look very familiar to most of you. This is the annual report template that AIDD provided last year which you can access from the NIRS resource page of our website or the UCEDD Resource Center. Part 1.a. of the annual report is your work plan progress report. The guidance from AIDD indicates you should use the work plan template that you most recently submitted to AIDD as a foundation and to add information to each activity that provides an update on progress for that activity. There is also additional information that should be included in this section of your annual report and I will scroll down so you can see the rest of this guidance. This is also where you provide information about faculty specialties, experience with a disability, race, ethnicity, and language, and your plan for offering academic credit. This should all look and sound familiar to you if you were involved in last year's annual report development. This is exactly the guidance that was provided last year. Many of you asked for some clarification to this guidance, some additional guidance. We heard questions such as how long should this section of the report be? Should it be three pages or 30 pages? How will the information be used? Because this would help you better prepare this section of the report so AIDD could best use it for the purposes it would like to use it for. Rest assured AIDD is taking all this into consideration and is working on clarifying guidance in this area of the report.

The guidance itself is likely not going to change, there's just going to be some clarification here about length or how it will be used, but there will be no significant changes to this part of the guidance. We don't have anything to share with you yet. AIDD is working on this and last we've heard we can expect something from them in mid-May. Now moving on to number two in the resolutions document, if you have that with you, and I am going to scroll down because this also has to do with the first part of the annual reports guidance. This is part 1B and it's the summary of evaluation results. Currently this sections guidance is relatively short. And asks you to provide a summary of how your UCEDD evaluation plan was implemented and asks you to describe a little information about your consumer advisory committee. In last year's annual report, some of you also reported on the results of your UCEDD evaluation plan while some of you did not. It doesn't specifically say to report on the results, it does say report on the implementation, but really what AIDD is looking for here is the results of your evaluation. They want to know how you are doing with your overall evaluation of your core grant. This is the evaluation plan that would have been outlined in your five-year grant application. They will be clarifying guidance in this area as well. Again you can expect this guidance from AIDD in mid-May but I can share that this clarification should include reference to reporting on the actual results of your evaluation. That shouldn't be too much of a surprise.

Let me move into another page, I have a number of webpages up here. This is a page of the UCEDD resource Center which is an online web portal that provides technical assistance information for the UCEDDs and this is relevant for the third issue in the resolution document. This is a request from network numbers. Many of you thought it would be helpful to see exemplary samples of the UCEDD annual report so you can compare whether what you have in mind to write is the same as what AIDD thinks is excellent. If I scroll down at the bottom there are examples of past annual reports. You can see that these reports are from past years, 2005 through 2008. These are not in the format that was just updated last year so these will not be helpful for you but AIDD is working on identifying high quality reports from 2013 that will be in the new format and we will post them on this page when they are ready. We will let you know when that is. Again, this is on the UCEDD Resource Center website and it's on the annual report page of that website.

Now I'm going to move on to issue number four in the resolutions document. I am going to look at NIRS. I have logged into NIRS already and I hope it has not logged me out yet. I will try to get to the annual report in NIRS. It doesn't seem to be going. Isn't that odd? That's working. Okay. I will open up the annual report. This issue number four in the resolutions document was really just a good catch by one of you. I will scroll down in this report and at the bottom and it are the GPRA measures. I can't recall which one of you data coordinators identified this issue but you did a good job. It was a good catch. There was an error in the instructions for the GPRA measures. I will open it up and show you basically I am highlighting the instructions that tells you what the GPRA measures are. They relate specifically to interdisciplinary preserve prep trainees. Last year we mistakenly mentioned continuing education trainees in the instructions. That was an error. These are only for interdisciplinary preserve trainees so we have removed any reference to continuing education trainees. If you did not see or catch that last year then this is no change for you. If you were one of the very detailed people who caught every little thing you will notice that we corrected that so thank you again for pointing it out to us. I hope this is another example of how we want you to let us know if you see something in NIRS that does not work, doesn't read correctly, or is inaccurate because we want to make this as accurate as possible. So number four was really just a small issue.

Number five, I moving into another section of NIRS. This is an activity record and specifically it is an activity record for technical assistance. In the resolutions document the list of issues and resolution number five addresses the initial outcomes questions that are required for some core functions. You should remember that these questions were introduced for the first time last year so these are very new. It was a new experience for people in the network to understand the questions and to implement asking the questions etc. and capturing the data for NIRS. The questions here in NIRS and I will scroll down to the initial outcomes questions. These are for the technical assistance core functions. You are looking at exactly how this language is written in the logic model. Some of you used this exact language when getting feedback from people who received technical assistance services and some of you modified these questions to make them easier to understand.

Your feedback indicated that it is necessary to modify these questions so they are more meaningful to people who are responding to them. We got a lot of feedback that these questions as they are worded are confusing to people, to families, they may not fit the type of technical assistance you are providing. So we took that to AIDD. Their response was that you may certainly adapt your data collection instruments to ensure accessibility, to make sure that people understand the questions while also ensuring consistency in the data collection process in NIRS. So basically that means you don't need to follow these questions language exactly when you are presenting the question to the recipient of your technical service. If you modify the question you should not modify it so much that it no longer fits when you aggregate the responses in NIRS. This question in NIRS will remain the same. But you should know if you need to change it in practice that you should. I really want to give a shout out here to Angela in Oklahoma for providing information on suggested modifications to these initial outcomes questions for the TA core function. This is available for you to review in the NIRS resources page of our website and I will show you what that looks like here on this webpage. This is the NIRS resources page. Corina did a fantastic job of organizing this page for us. I will scroll down in the section specific to UCEDD reporting to AIDD on the bottom of the column for other resources are suggestions for TA initial outcomes questions. This is a memo that was written by Angela in Oklahoma that outlines her experience and justifications and then below offers some suggestions for how these initial outcomes questions might be modified for the technical assistance core functions. It's all on the website available for you. We hope you find it helpful and thanks so much to Angela for sharing this resource with everyone. That is much appreciated.

I will close that back out and stay on the NIRS resources page for a minute because I'm going to need this page to move on to issue number six in the resolutions document. For issue number six we will take a look at some definitions. About the middle of this page there is a link here for what now says 2014 final definitions because we did modify a definition, or two definitions for clarification based on some feedback and a lot of questions that we got last year. I think this was a topic of concern to many folks last year. I remember Corina and I fielded a lot of questions about this and the questions had to do specifically with the core functions of technical assistance and model services. Let me scroll down to find the definitions for technical assistance and model services. There was duplication basically. Technical assistance to individuals and families could be reported in either of these core functions. So in the definition language for technical assistance there was reference to providing TA to individuals and families of people with disabilities and in model services also those are provided to individuals and families with developmental and other disabilities. So we had a lot of questions last year about where to report that particular service. It's actually a bigger problem because it leads to inconsistency in how these services are reported and one of the purposes for revising the logic model in the first place was to improve consistency and reporting across the entire network. So here's how we've updated it.

In a nutshell, think of technical assistance as problem-solving services to organizations and agencies. Model services are provided to individuals and families. That's how the definitions have been aligned so what we've done is just remove reference to services for individuals and families from the technical assistance definition. That of course continues to be included in the model services definition and we've made that specific clarification here, it's highlighted on my screen in purple. We also had a recommendation as we worked through this clarification, we had a recommendation I believe from Robin in New Jersey that we clarify in technical assistance that while technical assistance should not include TA to individuals and family, if you provide TA to self-advocacy organizations, family support groups or other organizations that would be considered technical assistance. Again technical assistance would be for organizations, agencies, groups; services are for individuals and families. That's how those definitions have been aligned.

And now that I'm thinking about it I didn't mention this earlier and I should have but all these issues and resolutions that we are going over now, not only did it come from the network and from AIDD but we also reviewed everything with a small group of data coordinators and UCEDD directors to make sure they were aligned with how you actually implement in practice. And the group we coordinated and reviewed it all with is the same group who contributed significantly to the development of the logic model in the new annual report.

I am going to move on to issues number seven and eight both of which bring us back to the annual report in NIRS which is here. So both of these we did not realize until we implemented the new changes in last year's annual report. We did not foresee the need for this until this year came around and we realized we need to be able to report some data from previous years. Issues seven and eight relate to data that you report in the current year based on work you've completed in past years. Number seven relates to information dissemination and number eight relates to research. If you are familiar enough with NIRS you'll remember that we close a full year's data set at the end of the year after your annual report is submitted and we reopen NIRS a day or two later. When it's reopened it's in the New Year's data set. Whenever you enter data in NIRS you can only enter data for the year in which you are working. The difference is in the new annual report format there may be times where you are implementing changes or counting materials or products or dissemination numbers based on work you have done a previous years. That is what we wanted to capture here. Let's start with information dissemination which is number seven on your left. The revised -- I'm going to open up this part of the annual report and you may see something new here. The revised PPR or annual report from last year reports data on both product numbers and information dissemination numbers so you are providing in the product data set the number of products you have developed a revised in that year and in the activities data set you are reporting on the numbers of those products that you have disseminated to whatever groups you've disseminated them to. If you wanted to report dissemination numbers for products you developed in previous years you also had to copy that product into the current fiscal years and then you can link your information dissemination activity to it. That would help you report accurate dissemination numbers. Unfortunately it resulted in inaccurate numbers of products that were developed in the same year. This is not a new problem. We have had this for a few years. But not until the 2013 annual report did you actually report as specifically on the number of products developed in that year.

So what we've done is to add a section of the annual report where you can specify which products you have disseminated from previous years. You'll see here on the screen there's a number of products developed and a number of products disseminated, these numbers here are pulled from the data set for this year. A new row is right below that and that says the number of products created during previous years but disseminated during the current fiscal year, so this is the issue we are addressing right now. This blue box you can click on. When you first click on it you are going to find this page right here that says select years. You can scroll up and down to see the full list of years for which your Center has products developed. So let's say we're doing an annual report for 2014 and last month's health fair you provided some brochures and some materials that your center developed in 2013 and 2012. So you check 2013 and 2012 and click the next button and it imports into the screen for you all of the names of the products that you developed in those years. So maybe at this health fair you disseminated some of those and some of these and then you gave an overview of autism so you check those because you know you gave those out and click next. You say how many you gave out, 45 of those, and 23 DVDs of that video. You save the data into the report and now you have a number. That's the number that updates your information dissemination activities for this year without skewing your product number for this year. Now I do have to clarify that you should no longer pull products forward from last year's data set into this year's data set for those information dissemination numbers. If you had products from last year data sets that you revised this year's then yes, obviously you should include them in this year's products. But if you only disseminated them this year you should not pull them over in your activity records because then you will duplicate your product numbers because they will be in both places. I see a question from Elizabeth. If you already have pulled them over, you're going to have to clean the data. I know that's not an answer people appreciate because I know it's time-consuming. We worked as quickly as we could to get these changes in as quickly as we could but right now with this fix which has just been finalized this week if you of already pulled in products from previous year into this year's data set and linked them to information dissemination numbers you should go back and unlink them. You will have accurate product information reported to AIDD this year and instead go to the annual report to update the numbers of products from previous years that you disseminated this year. You can go into this annual report at any time during the year. It's open and available now and this feature is there for you now. Say you want to update something, maybe you had another activity and you had 45 of these but you went to another health fair at our someone said they gave more you can just go back in here to change that number to 72 and it will update the number here in the annual report. So that is where that information should get pulled now.

I saw a few more questions in the chat box. I actually need to go back to the chat box to capture those questions but when I do that you will not see the screen so don't panic. I am looking at the chat box. Elizabeth, it looks like I answered your question about the product that you already pulled forward for this year. You need to unlink them. I apologize. Mikayla, your question… this can only be done in the annual report and can only be done by the administrator. So however you have set up your permissions for who can access what parts of NIRS, that's true, it will have impact here. You will have to figure out how that would work for your Center. You may want to create a process where it can be reported along the way and the person who has access to the annual report itself can enter the final data. You will need to work that out. And Elizabeth, I'm looking at your other question, it won't let us report dissemination without linking a product record. If you're in the same fiscal year that will continue. This fix in the annual report is a workaround. This is the link. What I just showed you is the link for making the connection between the product and the information dissemination records across fiscal years. So the way the code has been written, I will click this link again and show you when you go back to select previous years you feel like you should be able to click on that button but you can't. You have to click on this previous button down here. When you go here and you select your years whatever they might be, this is where you are going back into previous year's data sets only for the products. You click the next button it tells you what those products were that you provided in those previous years and you can identify by scrolling up and down which ones you did this year and that report on the numbers so this is how you make a link between products and information dissemination activities. Your information dissemination, I just realized your question may be the information dissemination activity itself. You still have access to that record for this year. You can still access a record and update the numbers here. So I hope that's clear but we can get to that more will we get to Q&A.

So let's move forward into issue number eight because it's similar to issue number seven in some ways. I will go back in the annual report. This is a good point. The close window blue button on the right and the Save Data and Close Window button on the left, if you've updated your numbers please be sure to click the button on the left to save your data. So I will say that data and close that window and it will take me back to the annual report. I will scroll down to the research core function and review and edit the data. Now this also addresses the need to look into past years data set to report information this year. The initial outcomes measure for research asks if the UCEDD have adopted research findings into other core functions. I think the language is, has the UCEDD made changes in other core functions based on research findings.. it's a good question because you want your research findings to be utilized. So you would hope that if you have new findings you would incorporate that into training, community training, pre-service preparation training, and maybe modify some products, things like that. So if you are using your research to inform the greater good. But what if your research was concluded in a prior year and you are just making the changes to other core functions this year? Maybe you are modifying a curriculum or a product, so we've added a new field in the annual report itself where you can select research activities from previous years to report on whether or not you have made changes in core functions this year. It is a blue button, review and update the list of activities. It looks very familiar. It looks like the information dissemination one. I will hit the previous button because I want to get back to selecting the years. Here you select the years you have done the research activities. I know some people have already asked the question of what if the research was over a three-year period. My recommendation would be to select the year in which you had the research findings; the conclusion of your research, I assume is the most recent year so I will click 2013 and unclick 2003. I will click next and it will give me the list of research activities for that year. I will click this and then save the data and it's going to automatically have the radio dial for yes. Automatically selecting yes for you, assuming that you would not have gone back to select those previous years' research activities if you didn't make changes to other core functions based on those. So that's how you are going to answer that particular initial outcome question for the research core functions for research where the findings were in previous years but the changes were in this year.

So I'm going to move to the last question. I'm also going to remember to save the data and I keep wanting to hit the back button but it doesn't work so don't get confused. Issue number nine takes us to the directory data set so I need to get out of the annual report and return to select the directory data set and pretend to add a contact. I have to let you know this is not directly related to the annual report but it

does relate to demographic data that is included in a directory contact. The LEND programs does report this data to MCHB. AIDD does not require this demographic data and I'm scrolling down in here to show you the demographics question. So there are race, ethnicity, and relationships with disabilities questions that I'm referring to for this piece of the presentation. You'll see the race and ethnicity are starred because those are required for LEND. Personal relationship is not starred because it is not required by anyone. AUCD Multicultural Council does review race and ethnicity across the board, across all Centers every year so whether you are LEND or a UCEDD you will find that these fields are required. We are encouraging people to also answer this question about personal relationships with disabilities. It's not getting formally reported to any of your funders however there's a lot of emphasis being paid to this data right now . That is not likely to change. You may remember our conference last year with addressing inclusion and diversity and race, ethnicity, experience with disability, orientation, and the list goes on and on. We are obviously in an increasingly multi-inter cultural world and as a network there's a large emphasis being placed on making sure that our network reflects the world in which we work. So while these fields are not necessarily required for your federal reporting especially if you are UCEDD only, we are asking you to please encourage folks to complete these fields. For new staff that you have if you add them to the directory they will be required to report these race and ethnicity questions. For already existing staff but have not updated their profile in a long time please encourage them to go in and do so. When they go in to update their profile they will have to answer these questions if they have not previously been answered. This is just a way for us to get a good baseline for where we are in our network on how diverse we are and how well we represent the communities in which we work and serve. We ask for your help with filling out that data. That brings us to the end of the resolutions document.

There were just those nine issues. The annual report guidebook will be updated hopefully early May. It's possible, I may be waiting for Corina to come back from maternity leave to update the guidebook but we will announce when it is ready. So I will move the screen out of the way. I want to give time for some questions. I have changed to a slide on your screen on how to contact Corina, Tanisha and myself with questions but I will start with the questions that you have asked already so I will start in the chat box because I see some we have not addressed yet. Cari asks so we only enter dissemination activities for new products developed in 2014? Good question. I will clarify. You enter dissemination activities for all the products that you develop. If you have developed the product in 2014 then in the activities data set in NIRS that is where you link your product to your information dissemination activity the way you of always done it in the past. The question here is information dissemination for products developed in previous years and that's where you just make that connection in the annual report itself. You don't need to create information dissemination activity for that and Elizabeth that might answer your question from earlier also. The numbers of your activities don't actually get reported to AIDD. Just the outcomes- the numbers of products made and disseminated. So that's how we made that fix so that you can have accurate products and accurate dissemination. I'm going to move on to Jacy's question. Could this not be a link to and utilize the following field for the FY. So your question is probably the question that we started with what we started looking at how to do this fix if we could possibly go into the fiscal year identification of the product. I know that is what the LEND programs use to report their products to MCH through the electronic handbook. That was actually a more difficult fix than it seemed for the purposes of reporting to AIDD. We didn't need to report quite that much, we didn't need to do it in the same way. We did it this way because AIDD is just looking for the numbers. This is an easier fix in coding for how to do that. I see that Michaella is typing right now. Elizabeth I tried to answer your question and I will open the phone lines in a moment. Michaella your question, so all data since July 2013 your question, so all data since July 2013 is going to have to conform to these changes? The answer is yes. You should report as accurately as possible in your annual report. I realize that means there will need to be data cleaned and you have been entering data in NIRS since August and I think this is purely a function of trying to get through the debriefings with AIDD. They needed time to review your annual report, do the debriefing, identify the issues, identify the resolutions and implement them in the code in annual report. I realize that you've been entering data while all that has been happening. We didn't know what the final outcome would look like until it was deployed this week, so yes you will need to go back and clean some of your data so you are making sure that you are not having duplications. And I do apologize for that. You may bring rotten tomatoes to the data coordinators meeting at our conference if that would help. Everyone has worked really hard on making sure that the data that we are

sending to AIDD is as clean as possible and as consistent as possible. It helps with their justification of our network funding to Congress and it helps us better compare apples to apples and oranges to oranges across the network. So I will give a shout out to Anna. I know she is on the phone. Can you open the phone lines for people? If you want to ask a question I believe you hit *pound

Correct.*Pound if you would like to ask a question. The lines are now open.

So if you are on the phone you can press *pound and you will get unmuted once it is time to ask your question. If you are listening just through your speakers on your computer you can hit the button to raise your hand which you see at the top of the screen there is a button that says status with a picture of a man with his hand raised.

Dawn, we have a question.

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Yes. This is Harold Kleinert.

Hi Harold, how are you?

I have a question about the technical assistance to families and being a direct service and I certainly understand that when you are providing technical assistance to a team, maybe a school team on assisting a child with developing a communication system that is truly technical assistance. But the parents are a member of that team so we are not going to enter it as a direct service for the parent and technical assistance to everyone else, are we?

I think you would address that as a team because everyone is benefiting from it right? Right, it's a TA to a team.

So the parent, I guess what I am saying there would be small numbers of parents or families who would be getting technical assistance in our data system and that would be an example.

Yes. I didn't mean for this definition to say that if there is a parent involved that means it's not technical assistance. This is meant to clarify that if you are only supporting a child or you are only supporting that family then it falls into model services. But if you are supporting the team then I consider that team to be an entity. That would be TA

Right. Thank you.

That's a good question. Thank you, Harold.

Thank you Dawn >>

Are there any other questions? I will go back to the chat box and I don't see any more questions there. Again you can press *pound on your phone if you have a question or if you are just listening through your computer you can hit the button to raise your hand. If we don't have any more questions then I guess we can be done for the day. Anna, are there no more questions?

No. There are not.

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Okay. I will go ahead and close the webinar for the day. I really do want to thank everyone for taking the time to be on the webinar and go through these changes. Thanks to everyone who has participated in guiding us through these changes so everyone who took part in the annual report workgroup and reviewing these resolutions we could absolutely not do this without you. If you think of questions

afterwards please don't hesitate to contact Corina, Tanisha, or myself. Corina is expected to come back in early May. She had a beautiful baby girl Olivia and is figuring out a sleep schedule right now but Tanisha is here in the meantime and I will be out of the office for the next two weeks but will be back in early May so don't hesitate to forward your questions. Thanks so much and have a great afternoon. [Event Concluded]