



Oregon Statewide Employment First Implementation Project

Employment First Final Report
for the period 1/1/2018 through 12/31/2020

Submitted: December 1, 2020

This report summarizes the training and technical assistance activities performed under Contract #156385 by Wise and its subcontractors during the period January 1, 2018 through December 31, 2020. The work reported here is based on the original contract and Amendments #1 and #2, which adjusted items in the original Statement of Work and extended work through December 31, 2020. This report meets the requirements of Amendment #1 Section 9, Final Report, and includes documentation for completion of Sections 2-8 for those requirements effective between January 1, 2018 and December 31, 2020.

Contracted activities related to training and technical assistance included: (1) 28-30 one- to two-hour Online Modules meeting specified requirements for identified target groups; (2) 24 Oregon Employment Leadership Network (OELN) in-person trainings, including events delivered in partnership with the Department of Human Services (DHS) Work Incentives Network, and quarterly training reports; (3) Fiscal Intermediary services to distribute reimbursements to service providers for the Mentoring Program based on approved plans and for costs of completing approved training; (4) Project and Administration Management, including planning and coordination, in-person and phone meetings with DHS personnel and reporting; and materials and supplies as defined in the Contract and its Amendments.

The report confirms and verifies that all requirements of the contract and its amendments have been met related to Online Module development, in-person training, fiscal intermediary services, and Project and Administration Management.

Contracted Activities January 2018-December 2020

All deliverables were completed and reported in Employment First Monthly and Quarterly Project reports, with links to relevant data along with shared Basecamp sites and file sharing. This report includes additional analysis of some of the required activities.

Online Modules

Exhibit A, Part 1 “Statement of Work”, Sections 2-5 Online Module Development, selected requirements:

3. Service Coordinators, Personnel Agents, and VR Counselors

b. Contractor will develop ten Online Modules using storyboards, script, and any multimedia content delivered to Contractor by DHS

4. Provider Organizations and Independent Providers

b. Contractor will develop four to six, one-to-two hour Online Modules for Job Coaching for a total of eight hours of online training.

(8) Contractor will develop one Participant and one Facilitator Guide for all of the Job Coaching modules.

c. Contractor will develop four, one-hour modules for Discovery for a total of four hours of online training.

d. Contractor will develop six, one-hour modules for Job Development and Marketing for a total of 6 hours of online training.

e. Contractor will develop three, one-hour modules for a total of three hours of training on the basics of benefits counseling.

5. Families, Residential Staff, and Other Individuals Approved by DHS.

Contractor will develop one Online Module, one hour in length, for families of individuals with I/DD, staff of residential facilities, and other individuals approved by the DHS.

Contract #156385-1, Items 3 b, 4 b, c, d, e, & 5

General and Online Module Requirements

Coordination with DHS. Early work on the Modules required clarification and adjustments to some Contract requirements, as well as changes in software. Wise and DHS reached an early agreement that one hour should be the maximum Module duration for online adult learners. Therefore, the Job Coaching Modules were adjusted to eight one-hour Modules rather than four-to-six one- to two-hour Modules, as stated in the contract. Later, the DHS Subject Matter Expert (SME) requested that not all of the Discovery Modules be held to a full hour of content and DHS approved this adjustment. Also, DHS determined that the DHS and Oregon Health Authority (OHA) Training Standards, as well as the DHS Communications’ Style Manual and Publication Design Guide (Version 2.4) applied exclusively to the published Job Coaching Guides and not to Online Module development. Wise, DHS and the production team worked together

to agree on the applicable standards. The teams also worked together to clarify issues with the Learning Management System (LMS) *iLearn*, including its capabilities related to pre- and post-testing, feedback data collection, and meeting accessibility requirements. The teams also identified issues related to the functionality of the production software, *Captivate*. For example, *Captivate* performed best when used with the *Internet Explorer web browser*, and was unable to support DHS's desired interactivity within Modules. These limitations eventually led DHS to provide a more up-to-date production application, *Articulate*, and then to upgrade that to a specific version with the needed capabilities. While these shifts were critical to the success of the project and improved the ease of use for learners, they required Wise to contract with a new production company and rework some Modules. These changes resulted in project delays and ultimately a contract deadline extension.

Module Review and Approval Process. Wise submitted detailed outlines for each Module via a general storyboard that included learning objectives, recommended training subjects, draft wording, and any multimedia requirements (e.g., voiceover, video) for DHS approval prior to Module development. Wise initiated work on any Module only after the storyboard was approved by DHS. Wise then wrote slide content and script, and submitted those to DHS for approval. Wise discussed and made changes in Modules requested by DHS, and then provided production drafts based on consistent design standards. DHS also reviewed and edited these production drafts prior to Wise and its contractor developing final production drafts. After fine-tuning with the production company, Wise submitted the final Modules, including files for the DHS LMS, *iLearn*, to DHS for approval. All voice over narration adhered to approved scripts and reflected a variety of voices that represent gender and cultural diversity. Because each Module had to go through several production stages prior to completion, to reduce rework Wise worked with DHS to clarify the types of edits and feedback needed on content and production drafts for each stage in production.

Uploading Modules. Once completed and approved, Wise provided needed files for each Module for DHS to upload to the Learning Management System and to update as needed.

Design Features. Developing Online Modules requires work on the instructional objectives, content and instructional design, including strategies for user engagement; functionality (e.g., navigation); the visual treatment of each screen; and special considerations for accessibility for the target audiences and other potential users. Strategies and features used by Wise and its contracted production company to achieve these are summarized in Table 1, along with the rationale for decisions related to each feature. The following narrative describes strategies and several of the resulting features in more detail.

Table 1. Features of the Online Modules and Rationale for Decisions

Module Feature	Rationale
CONTENT & SEQUENCE	
Content	Wise used the Oregon Core Competencies and Training Standards for Employment Professionals to create the Online Modules. Subject Matter Experts (SMEs) also contributed and reviewed content for all Modules.
Sequence of Modules	While there is benefit from completing the Modules in the order provided within each set, in most cases Modules may be taken separately or in any order. This provides the greatest flexibility to allow users to manage the focus and sequence of their learning. DHS, however, requested that users complete the Discovery Modules in order to better gain full understanding.
Level of Content	All Modules provide an introductory level of material in each topic area. Continuing education, observation of skilled practitioners, mentoring, etc. will be essential to retain and maintain training content.
NAVIGATION	
Next Button Disabled until Content Completed	Modules include restrictions such as requiring users to go through the entire hour of content in the Module to ensure full access to learning. Advancing a Module and skipping pages or sections of a Module would limit learning.
Navigation to Return to Module	The Modules include directions for navigation when learners select a link that takes them outside of the Module. Instructions explain how to return to the Module for users with varying levels of technology proficiency.
ACCESSIBILITY	
Unique Slide Titles	Unique slide titles are an accessibility feature, allowing Screen Readers to navigate the Module.
Color Contrast	Slides use higher levels of color contrast throughout the Modules to provide greater accessibility to those with visual disabilities, dyslexia and seizures.
Captions	All Online Modules include captions for content, video, and animations for people who are deaf, have hearing loss and/or are English language learners.
Transcripts	Wise has provided a transcript of all spoken information for each Module, allowing accessibility for large print, people who are deaf or have hearing loss, and various learning styles.

Module Feature	Rationale
Glossary	Glossaries which include acronyms are available in each Module to assist all learners to recall the meaning of acronyms, and to support different learning styles and reading levels.
“Drag and Drop”	Wise did not use “Drag and Drop” as a user function within Modules due to its need for hand-eye coordination and its inaccessibility to users with visual disabilities.
USER ENGAGEMENT	
Interactivity Features	To support learning, well-developed Modules include a variety of strategies by which the user may engage with the Module, beyond simply reading (or hearing) text. Table 2 includes a specific list of the various interactivity features used in these Modules.
Graphics	All Modules use graphics throughout for visual interest and to accommodate a variety of learning styles.
Voice Professionals, Image and Animation Choices	Voice professionals, animation characters and images for the Modules include a variety of genders, nationalities and cultural experiences to reflect potential audience members.
<i>IWorkWeSucceed</i> Photos and Success Stories	To assist users to relate to the content and examples provided, Module designers used a variety of jobs and locations throughout the Modules, including Oregon Employment First <i>IWorkWeSucceed</i> photos and success stories.
USERS AND USER PERFORMANCE	
Target Audience Applicability	Although sets of Modules were designed with specific Target Audiences in mind (e.g., Provider Organizations, Vocational Rehabilitation Counselors, Family Members), Wise developed each Module to be useful for anyone from any of the Target Audiences. See text for specific examples of applicability across Target Audiences.
No Pre-test included in Modules	One accepted strategy to measure user performance is to conduct pre- and post-tests within each Module with the same questions on both tests. The <i>iLearn</i> system, however, does not have the capability of tracking both pre-test and post-test scores in the same Module. Each Module does include a built-in post-test. See text for further discussion.
Knowledge Checks	Module developers interspersed knowledge checks throughout the Modules to both reinforce and increase learning.
Ability to Return to Content during Post Module Surveys	Developers disabled the function associated with returning to Module content to find correct answers, to obtain accurate assessment of learning from Post Module Survey questions.

Module Feature	Rationale
User Access to Modules	One of the great advantages of online training is that allows learners great flexibility. Modules will be available on the <i>iLearn</i> platform so that learners may access them at any time. With the exception of the Discovery Modules, individual Modules may be taken in any order or even as stand-alone learning topics. Modules are universally accessible for rural and urban learners wherever learners have internet access. Since the Modules are formatted for a variety of screen sizes they can be completed remotely from different devices, including laptops, smart phones, and iPads. The design and formatting of these Modules supports this flexibility.
OTHER	
Feedback Survey Questions within Modules	The <i>iLearn</i> system does not have the capability of tracking both a post-test and a feedback survey within a Module. Wise has provided sample content for a post-Module feedback survey that may be implemented by DHS by distributing it to users after completion of each Module or set of Modules.
Consistency in Slide Design and Navigation	The Online Modules use consistent colors and fonts in templates across all Modules, as well as overall design and functionality. This consistency provides a cohesive, pleasant design for the Modules, giving a more professional appearance and making the slides easier to follow.
Sustainability	Wise designed each Online Module for sustainability across time. We included document dates when we drew from specific documents, and encouraged DHS to not include items, such as specific forms, that were most likely to receive changes.
User Support after Implementation	DHS provides user support as they implement the Modules. To reduce the amount of ongoing user support necessary, Wise designed Modules to use consistent navigation requirements within Modules, and to include navigation instructions whenever a link takes the user outside of a Module.
Acronyms	All Modules explain acronyms so that new learners gain understanding of unfamiliar abbreviations when first introduced and again, periodically, throughout the Modules.

Module Content. All Modules reflect DHS policies current at the time of production, including Individual Support Planning, Career Development Planning, Person-centered Practices, Home and Community-Based Services, and the 20-hour standard for employment planning. Module content reflects Evidence-Based Practices, when available, or the most advanced, highest standards for content available. Module content also covers all of the

Oregon Core Competencies and Training Standards for Employment Professionals. Subject Matter Experts also contributed and reviewed content for all Modules.

Accessibility. Wise developed all Modules to be compliant with accessibility requirements related to captioning, which includes captioning for each Module, video and animation. While Wise and DHS’ desired accessibility level exceeded the funding for the project, Wise and their production company, Yukon, took steps to increase accessibility to a wider range of individuals including those with various disabilities. Wise avoided use of “drag and drop” interactivity due to its coordination requirements and inaccessibility for people with visual disabilities, and repeated slide titles to improve navigation and accessibility for those using screen readers. Modules also provide information orally, via transcript and through captioning to address potential user needs. For those with limited technology proficiency, Modules include instructions for returning to the Module when clicking on a link causes the learner to leave it.

Design for Learner Engagement. Wise designed Modules to address multiple learning styles (e.g., visual, auditory, kinesthetic) and to implement fundamental design principles for adult learners. Thus, Wise interspersed methods to support active participation with the material throughout the content to maintain the interest and participation of adult learners and enhance learning. In addition, Wise timed the text on screen with voice, and used Oregon-focused *IWorkWeSucceed* images and other interesting graphics to engage a diverse range of adult learners. See Table 2 for a summary of methods used.

Table 2. Interaction, Interest, and Engagement Strategies in Modules

<ul style="list-style-type: none"> • True/False • Multiple Choice • Select All that Apply • Rank (Best to worst examples) • Respond to a Scenario • Respond to a PowToon Video • Type in a response • Identify incorrect responses • Complete an internet search • Complete a device search • Select the correct category • Select the best description • Select the correct image • Use animations and videos 	<ul style="list-style-type: none"> • Identify how to apply a concept for a specific person • Identify options then check against examples • Identify additional options to those provided • Do a writing activity (e.g., Task Analysis, Business Proposal, etc.) • Engage in a physical activity (e.g., Take apart a pen and put it back together for Task Design) • Commit to apply information learned • Click to advance, expand concepts, play video/animations, transition activities • Navigate outside of the Module for further learning, success stories, etc.
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Performance Evaluation. Modules included development of pre- and post-testing to evaluate the learning accomplished by participants. Because the on-line learning system used

by DHS does not allow for both a pre-test and post-test, Wise could not build the complete evaluation system in production. However, Wise consulted with DHS staff regarding issues and strategies related to performance evaluation. The post-test, referred to as a “post-Module survey”, is provided in each Module. Learners need to pass the post-Module survey with a score of at least 80% to earn a certificate. The Module content is not available when completing the survey, so the user does not have the ability to go back through the Module to find answers. However, students may retake the post-Module survey if they do not pass. For greater accessibility and less test anxiety, there are no time limits placed on answering post-Module survey questions. Wise provided questions to DHS for their development of functional pre-tests.

Module Feedback. Although the *iLearn* system does not have the capability to request and summarize feedback from Module users, DHS requested an opportunity for participants to record their feedback on the quality of each Module. Therefore, Wise provided a sample set of feedback questions to DHS for their dissemination to participants. These questions include demographic data, as well as quality measures such as overall quality, level of engagement, relevancy of content, utility of training, clarity of instructions, technical aspects, and suggestions for improvement. Analyzing the data across Modules—both within a specific Module and across all Modules—can provide valuable information for improvement.

Sustainability. Sustainability is a critical issue for Online Modules. To support sustainability Wise made recommendations to DHS regarding, for example, giving less detailed references to forms, and adding dates to information such as Social Security Administration values. Wise has provided the production files to DHS so that DHS staff can manage necessary updates.

User Access to Modules. Wise developed all Modules with ease of access in mind. For example, they will be available at any time on the *iLearn* platform for learner access. Although there is benefit from taking the Modules in the order written, with the exception of the Discovery Modules, individual Modules may be taken in any order or even as stand-alone learning topics. Modules are universally accessible for rural and urban learners and wherever learners find themselves working while maintaining Covid-19 precautions. Since the Modules are formatted for a variety of screen sizes they can be completed remotely from different devices, including laptops, smart phones, and iPads. While each Module series was developed for one or more target audiences, there is value in others taking the Modules. For example, Services Coordinators and Personal Agents would benefit from taking the “Pursuit of Employment Module” so that they would better recognize when to recommend employment to someone. They also could find Modules designed for Provider Organizations and Individuals helpful in better understanding what to expect from providers of service. Likewise, people with intellectual/developmental disabilities or their families may want to watch some of the Modules intended for providers or Services Coordinators, Personal Agents and Vocational Rehabilitation Counselors to better understand those services.

Online Modules Developed

Target Audience: Services Coordinators, Personnel Agents, and Vocational Rehabilitation Counselors. In a previous contract, Wise staff partnered with over 30 Subject Matter Experts to create 10 Modules of content for this target audience. During the current contract Wise reviewed the storyboards, script, and multimedia content previously developed. The Wise role was to make recommendations for improvements, for example, in information flow, narrative style, presentation of key concepts, graphics, and strategies for ensuring engagement. DHS provided input on changes needed related to recent policy changes. DHS approved Wise recommendations for improvements.

Wise selected SMEs throughout the contract based on experience on the topic and willingness to create or share content that will become the intellectual property of DHS. SMEs who assisted in finalizing these Online Modules included a lengthy list of experts (see Table 3) from DHS, the Department of Education, Community Developmental Disabilities Programs, Brokerages, private and not-for profit organizations. These SMEs provided support on the initial development of these Modules, prior to this contract.

Table 3. Subject Matter Experts Supporting Online Modules for Services Coordinators, Personnel Agents, and Vocational Rehabilitation Counselors.

Subject Matter Expert	Affiliation
Providers/Non-Profits/Other	
• Michelle Furman	• Shangri-La (now ALSO)
• Gwyn Lema	• Creating Community Impact
• Heidi Dirkse-Graw	• Dirkse Counseling & Consulting
• Jenny Cavarno	• FACT
• Roberta Dunn	• FACT
• Arlene Jones	• Disability Rights Oregon
• Danelle Stuart	• OTAC
• Emily Harris	• Wise
• Jim Corey	• Wise
• Marsha Threlkeld	• Formerly of Wise
• Molly Holsapple	• Private Consultant
Brokerages	
• Heather Hopkins-Sletchka	• Full Access Brokerage
• Amanda Hall	• Mentor Brokerage
• Crystal Foster	• Southern Oregon Region Brokerage
• Laura Noppenberger	• Eastern Oregon Support Services Brokerage

Subject Matter Expert	Affiliation
County Developmental Disability Services	
• Sandy Hyduchak	• Lincoln County Developmental Disability Services
• Nancy Milligan-Mock	• Washington County Developmental Disabilities
• David Tom	• Clackamas County Developmental Disabilities
Oregon State Agencies	
• Sally Simich	• Oregon Department of Education
• Heather Lindsey	• Oregon Department of Education
• Stephanie Roncal	• Office of Developmental Disabilities Services
• Bradley Collins	• Office of Developmental Disabilities Services
• Julie Huber	• Office of Developmental Disabilities Services
• Acacia McGuire Anderson	• Office of Developmental Disabilities Services
• Gene Rada	• Vocational Rehabilitation (Now Office of Developmental Disabilities Services)
• Ann Balzell	• Formerly of Vocational Rehabilitation
• Paula Fitch	• Formerly of Vocational Rehabilitation
• Susie Calhoun	• Tribal Vocational Rehabilitation
• CJ Webb	• OTAC (Now Vocational Rehabilitation)
• Karen Burch	• Vocational Rehabilitation
• Tracy Clark	• Vocational Rehabilitation
• Patrick Foster	• Vocational Rehabilitation
• Keith Ozols	• Vocational Rehabilitation
• Derek Hill	• Vocational Rehabilitation
• Robin Brandt	• Vocational Rehabilitation
• Tracy Clark	• Vocational Rehabilitation

The 10 completed and approved Online Modules for the target audiences of Services Coordinators, Personal Agents, and Vocational Rehabilitation Counselors are:

1. Employment Expectations, Conversations and Informed Choice
2. Understanding Developmental Disabilities Services
3. Understanding Vocational Rehabilitation, Oregon Commission for the Blind and Tribal Vocational Rehabilitation
4. Understanding Schools, Transition Planning and Employment
5. Gathering Information: Establishing a Strong Foundation to Best Support the Employment Process
6. Employment Plan Development
7. Collaboration, Coordination and Communication: Building the Employment Team

8. Negotiating and Mediating Employment Issues for Desired Community Employment Outcomes
9. Vendor Selection and Monitoring for Quality
10. Social Security Administration Work Incentives: How SSA Work Rules Support Employment

Target Audience: Provider Organizations and Independent Providers. For this target audience, Wise completed eight hours of Online Modules on Job Coaching, approximately four hours on Discovery, six hours on Job Development and Marketing, and three hours on the Basics of Benefits Counseling.

Wise drew all SMEs to support development of these Modules from DHS, Wise, and FACT, including former employees of DHS and Wise. DHS approved all SMEs prior to starting curriculum development. SMEs for these Modules are listed in Table 4, below.

Table 4. Subject Matter Experts Supporting Online Modules for Provider Organizations and Individual Providers.

Modules for Provider Organizations and Individual Providers	Subject Matter Experts
Job Coaching	<ul style="list-style-type: none"> • Theresa Knowles, Office of Developmental Disabilities Services • Robyn Slocom, Wise • Jennifer Rice, formerly of Vocational Rehabilitation • Ryan Farrow, formerly of Wise
Discovery	<ul style="list-style-type: none"> • Julie Huber, ODDS • Jenny Crook, Wise • Katherine Titus, Wise
Job Development and Marketing	<ul style="list-style-type: none"> • Jenny Crook, Wise • Charly Walters, Wise • Monica Zumach, Wise
Basics of Benefits Counseling	<ul style="list-style-type: none"> • Katie Thompson, Work Incentives Network • Josh Goller, Work Incentives Network

Wise developed content for all Online Modules for this target audience to include content required by Contract #156385-1 and to address the needs of long-term support providers.

Job Coaching—Eight Online Modules totaling eight hours. The completed and approved Online Modules related to Job Coaching are:

1. History
2. Task Design

3. Task Analysis
4. Teaching Strategies
5. Fading
6. Job Start
7. Natural Supports and Communication
8. Job Preservation and Behavior Supports

The Contract also required one Participant and one Facilitator Guide, each encompassing all of the Job Coaching Modules developed for the target audience of Provider Organizations and Individual Providers. DHS requested that the Guides support DHS staff to provide live presentation of the two-day seminars as well as training or technical assistance on any one or more of the Job Coaching topics. Thus, the Guides support flexibility of teaching format. As a result, Wise organized information in Facilitator Guides for ease of navigation and added bulleted presentation content points, PowerPoint slides, and learner interactive activities along with detailed direction for use of the Guide. Suggested interactive learner activities include discussion questions, scenarios for role-playing, and hands-on practice.

Wise formatted the Participant Guide to match the Facilitator Guide, with separate sections for each of the eight job coaching topics. The Participant Guide uses a workbook format to support the learner's interaction with the content. Thus, it includes, for example, dedicated spaces for writing notes and activities that include questions that ask the learner to fill-in-the-blank or to select the best option(s) from a list.

Both the Facilitator and the Participant Guide provide relevant forms, sample agendas, a glossary of terms, activities such as Transition activities that are relevant to the Module topic, and clear instructions for activities. For both Guides, Wise followed design standards established by the DHS and Oregon Health Authority (OHA) Training Standards, as well as the DHS Communications' Style Manual and Publication Design Guide (Version 2.4).

Discovery—Four “up-to one-hour” Online Modules. The completed and approved Online Modules related to Discovery are:

1. Introduction to Discovery
2. Community-Based Experiences
3. Approval Criteria
4. Career Development Plan (CDP) and VR/OCB/Tribal VR's Individualized Plan for Employment (IPE)

Unlike the other sets of Modules, the Discovery Modules need to be completed by users in sequential order, for best understanding of the purpose, process and outcomes of Discovery.

Job Development and Marketing—Six One-hour Online Modules. The completed and approved Online Modules related to Job Development and Marketing are:

1. Supported Employment Introduction
2. Marketing

3. Business Exploration
4. Representing the Job Seeker
5. Workplace and Job Analysis
6. Working with Employers

Basics of Benefits Counseling—Three One-hour Modules. The completed and approved Online Modules related to the Basics of Benefits Counseling are:

1. Supplemental Security Income
2. Understanding How Employment Impacts Title II / Social Security Disability Insurance Benefits
3. Bringing It All Together and Building Assets

Target Audience: Families, Residential Staff, and Other Individuals Approved by DHS—One One-hour Online Module. The SMEs who supported the development of this Module were:

- Theresa Knowles, Office of Developmental Disabilities Services
- Erica Drake, Office of Developmental Disabilities Services
- Roberta Dunn, Executive Director, FACT

The completed and approved Online Module for this target audience is titled, “The Pursuit of Employment.”

Deliverables related to Online Modules: Completed

Recommendations related to Online Modules

Based on the work Wise and its production contractor completed on these Online Modules, in cooperation with DHS staff, there are several recommendations that, if implemented, would improve the process of developing future Online Modules, their sustainability, application and ultimately the impact on the supported employment field.

Limitations of an Online Platform. The Online Modules developed under this contract are intended as a basic introduction to Employment First topics, making them especially valuable for those new to the field. The online nature of the Modules will be particularly helpful as the field rebuilds and gears up to return to in-person services after limitations due to Covid-19. Supplemental learning such as in-depth training, mentoring and observation, etc. will be essential to retain and maintain training content.

Sustainability of Modules. Wise worked to identify information that was specific to when the Modules were developed in 2020. As policies and information change, DHS will need to make edits to keep the content current. Wise provided all files to DHS to allow for changes to be made as needed. Allowing Modules to become out of date will reflect poorly on DHS and waste the resources invested in Module development. Module updates are especially essential since those new to the field will not be able to recognize outdated information. Wise recommends that DHS: 1) List the items and their locations in each Module that are most likely to require

updating (e.g., references to specific policy statements or forms) to facilitate finding those spots during reviews; 2) establish a standardized system that includes a schedule for a regular full review and update for each Module, in addition to as-needed updates, for example when a specific policy changes or when user feedback indicates a change is needed; and 3) identify a person or team that is familiar with the content to be responsible for identifying needed updates to content, knowledge checks and pre- and post-test questions and for making the needed adjustments.

Performance Evaluation. Comparison of pre-test and post-test scores provides valuable information about baseline knowledge level of those taking the Modules, the amount of expanded knowledge after taking the Modules, and which topics or questions present the most difficulty for learners. Using the same set of questions both before and after each Module would present the most accurate and useful measurement of change in knowledge. DHS then can use this information to improve the Modules as well as to inform its overall professional development plans for community providers, families, and others. Wise recommends that DHS implement a pre-test plan quickly and assign a staff person to review and evaluate pre- and post-test information on a regular basis. These reviews will provide information on areas for future training and technical assistance focus. If at some point, DHS becomes able to link pre- and post-tests to individual students for analysis, then additional powerful information could be garnered on individual and provider needs.

User Feedback. Wise also recommends that DHS implement a user feedback survey system. The system should include a specific DHS staff member assigned to evaluate the information and identify improvements that need to be made to the Online Learning System, based on that feedback. Depending on the final selection of feedback survey questions, DHS will receive important information on target audience experience with these Modules, as well as identify new areas for training and technical assistance.

In-Person Trainings

Exhibit A, Part 1 “Statement of Work”, Section 6 subsections a, b, and g:

a. During each 12-month period of this Contract, Contractor will deliver a maximum of 12 Oregon Employment Learning Network (OELN) in-person trainings, for a maximum of 24 trainings for the length of this Contract, to Provider Agencies and Independent Providers.

These will include:

- (1) “Introduction to the History of Supported Employment, Discovery, and Person-Centered Planning” trainings.*
- (2) “Job Development and Marketing” trainings.*
- (3) “Systematic Instruction” trainings.*

b. During each 12-month period of this Contract, Contractor will partner with DHS’ Work Incentives Network to deliver a maximum of four OELN “Social Security Benefits” trainings, for a maximum of eight trainings for the length of the contract.

g. Contractor will deliver to DHS a quarterly list of training participants and a list of those participants that have completed the OELN series and have been issued either an ACRE or DHS OELN Certification.

Contract #156385 Amendment Number 1, Items a, b, g.

Training Events Provided. Between 1/1/2018 and 11/20/2019, Wise provided 30 two-day events representing 60 days of In-Person Training. The four types of seminars, listed in Table 5, together form the ACRE-certified Oregon Employment Learning Network series. These events covered all the Oregon Core Competencies and Training Standards for Employment Professionals.

All trainings were presented by Wise staff, Wise Associates and Oregon Vocational Rehabilitation Services and Work Incentive Network staff. Wise Associates included two individuals who completed the Trainer Mentoring Pilot Program on Systematic Instruction, and four Provider Agency staff members with direct experience in Employment First. Wise staff communicated with DHS regarding the planning and coordination of all In-Person Trainings, including obtaining approval from DHS for all geographic locations, according to regional need. Fourteen in-person trainings were held in 2018, and 16 in 2019. No in-person trainings were held in 2020.

Table 5 provides a summary of In-Person Trainings provided by topic.

Table 5. Contracted In-Person Trainings Delivered by Topic

Seminar	Trainings Provided
Introduction to the History of Supported Employment, Discovery & Employment Planning	9
Social Security Benefits & Work Incentives	6
Job Development and Marketing	7
Systematic Instruction & Follow-along	8
Total Trainings	30

Individual events, including the trainers, dates, locations, registration and attendance information for each, are listed in Table 6, below.

Table 6. Summary of In-Person Training Events between 1/1/2018 and 12/31/2019¹

Seminar	Session Leaders ²	Dates & Locations	# Registered / Attended	
Introduction to the History of Supported Employment, Discovery & Employment Planning	Emily Harris, Wise	<u>2018</u>	<u>2018</u>	
		3/27-3/28/18 Medford	31/24	
	Michelle Furman, (Shangri-La) ALSO,	4/6-4/7/18 Portland	39/34	
		5/2-5/3/18 Salem	51/41	
	Debra McLean, Wise	8/1/18-8/2/18 Clackamas	50/36	
		9/13-9/14/18 Salem	56/45	
	<u>2019</u>		2/20-2/21/19 Salem	49/39
			4/3-4/4/19 Bend	24/21
			7/17-7/18/19 Portland	48/38
			10/3-10/4/19 Pendleton	29/13
Social Security Benefits & Work Incentives	Eugene Rada, (OVRs)	<u>2018</u>	<u>2018</u>	
		5/15-5/16/18 Salem	52/37	
	Katie Thompson, WIN	9/4-9/5/18 Clackamas	53/38	
		<u>2019</u>	<u>2019</u>	
	Josh Goller, WIN	4/16-4/17/19 Salem	51/35	
		6/25-6/26/19 Springfield	32/21	
Job Development and Marketing	Val Morgan, Conscious Moves	<u>2018</u>	<u>2018</u>	
		4/24-4/25/18 Salem	51/46	
	Claire Prichard, UCP	6/6-6/7/18 Clackamas	50/41	
		Ryan Farrow, Wise	10/10-10/11/18 Pendleton	22/19
	Emily Harris, Wise	<u>2019</u>	<u>2019</u>	
		Jenny Crook, Wise	1/30-1/31/19 Salem	48/44
	5/7-5/8/19 Springfield	41/36		

Seminar	Session Leaders ²	Dates & Locations	# Registered / Attended
		9/24-9/25/19 Clackamas	46/46
		11/19-11/20/19 Bend	24/18
Systematic Instruction & Follow-along	Robyn Slocom, Wise	<u>2018</u>	<u>2018</u>
	Aimee Nelson, Trillium	2/26-2/27/18 Pendleton	22/20
	Michael Stegemeier, Community Services, Inc.	4/30-5/1/18 Bend	28/22
		5/23-5/24/18 Salem	53/44
		8/20-8/21/18 Clackamas	50/37
	Wendy Taliaferro, Trillium	<u>2019</u>	<u>2019</u>
		1/8-1/9/19 Salem	53/47
		4/18-4/19/19 Bend	27/21
		6/4-6/5/19 Clackamas	49/39
		10/15-10/16/19 Pendleton	22/23
Totals	15 Session Leaders	60 days of Seminars	1193/992³

¹ = No In-Person trainings were held in 2020

² = Individual session leaders listed participated in one or more of the seminars held.

³= Sums of registrants/attendees include duplicated counts if individuals registered for or attended more than one seminar during the period reported.

Registered Participants. Table 6, above, included the number of participants registered for, as well as the number actually in attendance at each event. A total of 992 participants attended the 30 In-Person Training events that were held between January 2018 and December 2019. These figures include duplicate counts for any participant who registered for and/or attended more than one seminar during the time period. Individuals who registered for but subsequently canceled their registration, or who registered but did not attend are not included in either the Registered or Attended counts.

As shown in Table 7, below, 563 unique individuals attended seminars during this time period, with 64 unduplicated individuals attending four or more seminars in the series during this reporting period only. A total of 106 individuals attended two seminars, 64 attended three, and 369 attended just one seminar during the reporting period. These totals across years do not represent all individuals who have attended OELN, because these counts don't include attendance at seminars held during reporting periods prior to 10/2014. In addition, the counts do not include attendees at seminars offered outside of this contract or provided as on-line services by Wise or other training organizations.

Table 7. Number of In-Person (OELN) Seminars Each Contract Period Attended by Individual Participants between 10/2014 and 12/2019 (Unduplicated Counts)¹.

Number of Seminars Attended by Individual Participants	Number of Participants 10/2014 through 6/2015 (9 Months)	Number of Participants 7/2015 through 6/2016 (12 months)	Number of participants 7/2016 through 6/2017 (12 months)	Number of Participants 7/2017 through 12/2017 (6 months)	Number of participants 1/2018 through 12/2019 ² (24 months)
1	141	251	259	166	369
2	33	84	82	35	106
3	16	31	24	18	64
4	3	15	15	22	60
5	0	1	0	1	4 ³
Total Unduplicated Count	193	382	380	385	563
Number of Seminars	10	16	17	10	30

¹ = Counts were completed within each 6-, 9-, 12- or 24-month contract period and do not consider if an individual attended seminars across more than one contract time period.

² = No In-Person Trainings were held in 2020, the third year of the contract.

³ = Four participants attended one seminar twice, in other years, 1 person attended 1 seminar twice

Table 8 reports the attendance at each type of In-Person Training since July 2013, representing more than six years of OELN Seminars. In this time, Wise has filled nearly 3100 seats.

Table 8. Attendance at In-Person OELN Seminars held from 10/2013 through 12/2019^{1,2}

Seminar	Intro. to SE, Discovery, & Employment Planning	Job Development & Marketing	Social Security Benefits & Work Incentives	Systematic Instruction & Follow-along	TOTALS
Totals 1/2019-12/2019 (12 mos.)	111	144	123	130	508
Totals 1/2018-12/2018 (12 mos.)	180	106	75	123	484
Totals 7/2017-12/2017 (6 mos.)	111	71	72	131	385
Totals 7/2016-6/2017 (12 mos.)	103	122	116	202	543
Totals 7/2015-6/2016 (12 mos.)	154	108	147	167	576
Totals 10/2014-6/2015 (9 mos.)	83	71	34	63	251

Seminar	Intro. to SE, Discovery, & Employment Planning	Job Development & Marketing	Social Security Benefits & Work Incentives	Systematic Instruction & Follow-along	TOTALS
Totals 10/2013-9/2014 (12 mos.)	91	79	59	97	326
Total 10/2013-12/2019	833	701	626	913	3073

¹ = If a person attended more than one In-Person event, they are counted in these data for each event attended.

² = There were no In-Person Trainings held in 2020.

ACRE Certificate of Completion. OELN and its instructors became ACRE-accredited in 2016, so participants who complete all four OELN classes receive an ACRE Certification of Completion. DHS grandfathered participants who completed OELN classes prior to 2016, and decided to accept a combination of non-ACRE and ACRE OELN training for a state-issued certificate. In 2018-2019, a total of 92 people achieved an ACRE Certificate of Completion by completing the four-seminar ACRE-accredited OELN in-person series (at least 28 had completed OELN classes prior to this contract period), and 10 others completed a combination of ACRE and non-ACRE classes and achieved an Oregon Employment Learning Network Certificate of Completion.

Participant Affiliations. During the current reporting period, participants primarily represented employment service providers (98% of participants). Sixteen individuals represented schools/ESD/YTP; another 16 were from residential providers. The types of organizations represented by participants are summarized in Table 9 below.

Table 9. Affiliations of Participants Attending In-Person Trainings 1/2018 through 12/2019¹

Type of Organization	Intro. to SE, Discovery, & Employment Planning	Job Development & Marketing	Social Security Benefits & Work Incentives	Systematic Instruction & Follow-along	TOTALS
Service Provider-Vocational ²	271	230	188	216	905
Service Provider-Residential	6	6	2	2	16
School/YTP	6	6	1	3	16
Family/Self advocate	5 ³	2 ⁴	3 ³	0	10
CDDP/Brokerage	0	0	4	0	4
Voc. Rehab. Div.	0	0	0	2 ⁵	2
Other	4	8	4	7	23

¹ = If a person attended more than one In-Person event, they are counted in these data for each event attended.

² = Organizations may provide other services in addition to Employment.

³ = Each of these individuals also identified a work role, and so are counted twice.

⁴ = One of these individuals also listed a work role, and so is counted twice.

⁵ = Both individuals were from Tribal VR

Participant Experience Level. The intent for this series of In-Person Training was to increase the number of qualified Employment Professionals across Oregon. To help determine how well that was accomplished, Wise included two questions in the registration process related to experience.

Based on those indicating they had not received training on the topic of the seminar attended, 504 individuals or 52% of 964 (duplicated) attendees were new to the training and core competency content. Table 10 below summarizes the number and percent of “Yes” responses to the question, “Have you ever received training on this topic?” Despite many never having received training on the topic attended, 75% of respondents indicated they had helped an individual with intellectual/developmental disabilities get a job.

Table 10. Experience Level Reported by In-Person Training Attendees¹

Question	# Respondents	# “Yes”	“Yes” % of Respondents
Have you ever received training on this topic?	964	459	48%
Have you ever helped someone with an intellectual or developmental disability obtain and/or maintain individual employment in the community?	969	731	75%

¹ = Data include duplicated counts if one person attended more than one seminar

Feedback on In-Person Trainings. Tables 11 - 14 summarize evaluation scores from participants on each In-Person Training session held during the contract, as well as summarizing those scores across seminars within a topic. Overall, seminar participants appear to have been very satisfied with In-Person Trainings presented by Wise under this Contract.

Table 11. In-Person Training “Introduction to the History of Supported Employment, Discovery & Person-Centered Employment Planning”: Summary of Satisfaction Scores January 1, 2018-December 31, 2019¹

Seminar Date & City	Attendance	Training	Presenter	Materials	Value of Info	Location	Timing of Training	OVERALL
3/27-3/28/18 Medford	24	4.63	4.63	4.42	4.63	4.13	4.17	4.43
4/6-4/7/18 Portland	34	4.63	4.81	4.50	4.63	4.31	4.47	4.56
5/2-5/3/18 Salem	42	4.69	4.86	4.48	4.83	4.67	4.67	4.70
8/1-8/2/18 Clackamas	36	4.39	4.64	4.05	4.50	4.23	4.28	4.35
9/13-9/14/18 Salem	45	4.59	4.80	4.41	4.54	4.63	4.34	4.55
2/20-2/21/19 Salem	37	4.68	4.74	4.47	4.79	4.26	4.59	4.59
4/3-4/9/19 Bend	21	4.76	4.86	4.71	4.76	4.81	4.71	4.77
7/17-7/18/19 Portland	38	4.87	4.89	4.61	4.86	3.92	4.62	4.63
10/3-10/4/19 Pendleton	23	4.79	5.00	4.71	4.93	4.29	4.86	4.76
OVERALL AVERAGE	15.9	4.67	4.80	4.48	4.72	4.36	4.52	4.59
Survey Response Rate³		94%						

¹ = There were no seminars presented under this contract in 2020.

² = All averages across seminars are calculated using the seminar average scores, rather than calculating across all individual ratings. This method gives each seminar event equal weight in the calculation. Therefore, a seminar with 20 responses is weighed as heavily as another seminar with 40 responses.

³ = Response rate across seminars

Table 12. In-Person Training “Systematic Instruction and Follow-Along”: Summary of Satisfaction Scores January 1, 2018-December 31, 2019¹

Seminar Date & City	Attendance	Training	Presenter	Materials	Value of Info.	Location	Timing of Training	Overall
2/26-2/27/18 Pendleton	18	4.06	4.41	3.82	4.31	4.24	4.18	4.17
4/30-5/1/18 Bend	23	4.70	4.74	4.39	4.83	3.91	4.52	4.51
5/23-5/24/18 Salem	44	4.53	4.77	4.56	4.65	4.67	4.71	4.65
8/20-8/21/18 Clackamas	37	4.32	4.59	4.19	4.32	4.30	4.24	4.33
1/8-1/9/19 Salem	48	4.53	4.70	4.34	4.81	3.45	4.19	4.34
4/18-4/19/2019 Bend	21	4.59	4.82	4.45	4.73	4.76	4.59	4.66
6/4-6/5/19 Clackamas	37	3.41	3.76	3.03	3.91	3.74	3.38	3.47
10/15-10/16/19 Pendleton	16	4.42	4.83	4.67	4.75	3.67	4.50	4.47
OVERALL AVERAGE	30.5	4.32	4.58	4.18	4.54	4.09	4.29	4.32
Survey Response Rate			93%					

¹ = There were no seminars presented under this contract in 2020.

² = All averages across seminars are calculated using the seminar average scores, rather than calculating across all individual ratings. This method gives each seminar event equal weight in the calculation. Therefore, a seminar with 20 responses is weighed as heavily as another seminar with 40 responses.

³ = Response rate across seminars

Table 13. In-Person Training “Job Development and Marketing”: Summary of Satisfaction Scores January 1, 2018-December 31, 2019¹

Seminar Date & City	Attendance	Training	Presenter	Materials	Value of Info	Location	Timing of Training	OVERALL
4/24-4/25/18 Salem	46	4.27	4.29	3.78	4.40	4.39	4.15	4.22
6/6-6/7/18 Clackamas	41	4.57	4.76	4.39	4.49	4.43	4.35	4.50
10/10-10/11/18 Pendleton	20	4.35	4.60	4.25	4.95	4.30	4.10	4.42
1/30-1/31/19 Salem	44	4.47	4.60	4.40	4.57	4.63	4.50	4.53
5/7-5/8/19 Springfield	36	4.56	4.82	4.41	4.62	3.85	4.24	4.42
9/24-9/25/19 Clackamas	46	4.57	4.67	4.54	4.63	4.37	4.37	4.52
11/19-11/20/19 Bend	18	4.65	4.82	4.63	4.88	4.65	4.88	4.75
OVERALL AVERAGE	35.9	4.49	4.67	4.40	4.69	4.29	4.30	4.47
Survey Response Rate³			91%					

¹ = There were no seminars presented under this contract in 2020.

² = All averages across seminars are calculated using the seminar average scores, rather than calculating across all individual ratings. This method gives each seminar event equal weight in the calculation. Therefore, a seminar with 20 responses is weighed as heavily as another seminar with 40 responses.

³ = Response rate across seminars

Table 14. In-Person Training “Social Security Benefits and Work Incentives”: Summary of Satisfaction Scores January 1, 2018-December 31, 2019¹

Seminar Date & City	Attendance	Training	Presenter	Materials	Value of Info	Location	Timing of Training	OVERALL
5/15-5/16/18 Salem	37	3.95	3.95	3.87	4.26	4.13	4.03	4.03
9/4-9/5/18 Clackamas	38	4.53	4.62	4.56	4.59	4.21	4.18	4.45
4/16-4/17/19 Salem	35	4.18	4.24	4.18	4.21	4.35	4.29	4.24
6/25-6/26/19 Springfield	23	4.57	4.70	4.61	4.70	4.04	4.30	4.49
9/17-9/18/19 Portland	44	4.23	4.34	4.20	4.44	3.75	4.12	4.18
11/5-11/6/19 Bend	23	4.82	4.82	4.68	4.82	4.55	4.77	4.74
OVERALL AVERAGE	33.3	4.38	4.44	4.35	4.50	4.17	4.28	4.35
Survey Response Rate³		96%						

¹ = There were no seminars presented under this contract in 2020.

² = All averages across seminars are calculated using the seminar average scores, rather than calculating across all individual ratings. This method gives each seminar event equal weight in the calculation. Therefore, a seminar with 20 responses is weighed as heavily as another seminar with 40 responses.

³ = Response rate across seminars

Deliverables related to In-Person Training: Completed. Wise completed 30 2-day In-Person Trainings (60 total in-person training days), including nine Introduction to Supported Employment, Discovery and Employment Planning seminars, seven Job Development and Marketing seminars, eight Systematic Instruction seminars, and, with the support of the Work Incentives Network, six Social Security Benefits/Work Incentives seminars. These In-Person Trainings were attended by a total of 992 participants.

Recommendations Related to Professional Development

Plan for a Continuous Need for In-Person Training. There will be an ongoing need for a significant level of training opportunities of different types to meet the needs of service providers and others in Oregon. While the Online Modules will assist with providing introductory information on the topics covered, they will not be sufficient to assist providers to acquire skills that they can apply in a variety of settings and situations. Thus, as Oregon recovers from the pandemic, DHS should continue to plan for multiple training opportunities, along with other training in specialized topics and for more advanced needs. Ensuring that Oregon has highly qualified staff throughout the state to meet the employment support needs of individuals with developmental disabilities must be an ongoing investment.

Fiscal Intermediary**ACRE Training Certification Reimbursement Program**

Exhibit A, Part 1 “Statement of Work”, Section 7 “Fiscal Intermediary”, subsection a.

a. Contractor will distribute reimbursements to individuals or Provider Organizations in rural areas. Individuals or Provider Organizations will be identified by DHS, will have completed the online supported employment certification, and will provide proof of the certification to Contractor. Contractor will distribute up to \$20,000.00 in reimbursements to the individuals or Provider Organizations...

Contract #156385, Amendment Number 1, Item 7.a.

DHS approved 10 requests for training reimbursement from five Oregon Providers operating in rural areas (Baker, Crook, Jefferson, Malheur, and Union counties) between January 25 and May 30, 2019. Of these 10, only three requests were completed by the agencies and therefore processed by Wise, for a total of \$1,470 in reimbursement. All three participated in Griffin-Hammis training April 1 and June 21, 2019 and received their certificates on June 21, 2019. The limited use of the program by organizations in rural areas led DHS to issue a new Transmittal (APD-AR-20-10, 2/21/2020) that expanded the program to include all eligible Provider Agencies that provide services anywhere in Oregon.

Between February 21 and July 14, 2020, DHS received an additional 44 requests for reimbursement from 19 individuals and Providers in Clackamas, Jackson, Lane, Lincoln, Marion, Multnomah, and Washington counties, for a total of 54 requests. Of these, 45 requests (83%) were completed by agencies and processed by Wise. All approved reimbursements were completed prior to December 15, 2020. The total funds allocated and paid within this program totaled \$19,295. All payments to Providers followed DHS-established criteria for payment. Table 15, below, summarizes all requests by organizations, the counties in which they worked, and the total personnel who completed training and received certification.

Table 15. Approved Training Reimbursement Requests (Rural + Statewide, “Total Personnel”) by Organization and County, with the Total of Those Who Completed Training and Received Certification.

	Baker	Clackamas	Crook	Jackson	Jefferson	Lane	Lincoln	Malheur	Marion	Multnomah	Union	Washington	Total Personnel	Total Certified
Abilitree			1										1	1
Ackley Counseling				2									2	2
AF, PSW/Job Coach							1						1	1
Albertina Kerr										10			10	10
Amie's Community Care												1	1	1
Central Oregon Empl. Solutions					3								3	0
Community Vision										3			3	3
Compass Career Solution										1			1	1
Destination Autonomy												1	1	1
Dirkse Counseling & Consulting										7			7	6
Housing Independence										2			2	2
IS Living									2				2	2
Key Consulting						2							2	2
Opportunities Unlimited										2			2	2
Opportunity Fdn of Central Oregon					2								2	1
Rise Services, Inc.												1	1	0
Shangri-La									1				1	0
Step Forward Activities, Inc	1												1	0

	Baker	Clackamas	Crook	Jackson	Jefferson	Lane	Lincoln	Malheur	Marion	Multnomah	Union	Washington	Total Personnel	Total Certified
Supported Empl. Services						4							4	4
Trellis		1											1	1
United Cerebral Palsy Oregon										4			4	4
Witco, Inc,								2					2	1
Totals by County	1	1	1	2	5	6	1	2	3	29	1	2	54	45

Organizations chose highly qualified training providers approved by DHS. Twenty-three staff persons of 26 requests (88%) completed training provided by Griffin-Hammis; 20 out of 25 (80%) completed training by Virginia Commonwealth University; and two of the three (67%) requests for the Wise Online Academy completed that training. The overall completion rate, averaging across participants was 83%.

Mentoring for Employment Services

Exhibit A, Part 1 “Statement of Work”, Section 7 “Fiscal Intermediary”, subsection b.

b. Contractor will distribute reimbursements to Provider Organizations identified by DHS that meet the standards to be a mentor and will reimburse other Provider Organizations identified by DHS for job shadowing...

Contract #156385, Amendment Number 1, Item 7.a.

Wise’s role in this program was to manage the disbursement of funds to approved Provider Organizations for Mentoring or Job Shadowing, based on Technical Assistance (TA) Plans approved by DHS. Between June 4 and November 19, 2020, DHS approved 15 TA Plans that had services provided, supporting 11 different “Mentees.” Two of these Mentees had two plans approved, one each with two different Mentor programs. The 15 approved plans represented six approved Mentor agencies: Alternative Work Concepts, Living Opportunities, Dirkse Counseling and Consulting, Inc, United Cerebral Palsy of Oregon, Partnerships in Community Living, Inc. and Bay Area Enterprises.

Approved plans included from 10 to 32 hours of planned TA (including travel time), for a total of 289 approved hours across plans, and an average of 28.4 planned hours. The total budgeted cost of these 15 plans was \$20,925 of the \$60,000 allocated to this program. Approved

Mentoring plans addressed topics such as setting up an employment services program, Discovery, job development, job shadowing, policy and procedure development, funding options, budgeting and fiscal stabilization. Table 16, below, presents a summary of TA topics on approved TA Plans, based on 11 categories. Each Plan included activities that fell into one or more categories. The most frequent Plan categories were Job Coaching (10 Plans), Job Development (8 Plans), Program Development or Restructuring (7 plans), Budgeting/Funding (9 Plans) and Discovery and Business Operations (6 plans each).

Wise processed \$10,218.75 in approved reimbursements to Mentor agencies. The pandemic that struck in March of 2020 likely impacted this program, as only one request was processed and approved preceding February 2020. All approved reimbursements were paid prior to 12/16/20. All payments to Providers followed DHS-established criteria for payment. With all planned hours billed, a total of \$49,781.25 remained, not paid or encumbered by this program. Throughout the duration of the program, Wise informed DHS of the level of usage of these funds.

Deliverables related to Fiscal Intermediary activities: Completed

Table 16. Summary of Approved Mentoring Requests.

Name of Mentor	Name of Mentee	Hours of TA and Travel requested	Hours of TA Approved	Actual Hours Used	Discovery	Job Development	Job Dev Modeling	Job Coaching	Budgeting/ Funding	Business Operations	Rule Compliance	Behavioral Support	Protocol Development	Prog develop or restructure	VR Application/ program/ contract
AWC	NSP	NA ¹	20	10	x	x		x			x			x	x
Living Opps	Good2Go	8	12	2	x	x	x	x	x	x	x	x	x	x	x
Living Opps	UCP	20 /16 ²	20 /12	13.5		x	x	x	x					x	
Dirkse	SERP	NA	10	2.25							x				x
UCP	CAS	20 /10	30	10				x							
Living Opps	Premier	15	15	4.25	x	x		x		x	x			x	x
BAE	Premier	NA	10	5		x	x	x							
AWC	ISL	60/6	20	20	x	x	x	x	x						
AWC	ISL	40	40	16	x	x	x	x	x						
Dirkse	UCP	20	20	12.75						x				x	
Dirkse	AS	80-100	20	14	x	x		x	x	x				x	x
AWC	LO	10	10	4				x							
Dirkse	ES	20	20	7.5					x	x					
PCL	ISL	20	20	11					x	x			x		
PCL	IEI	10	10	4					x	x					
Totals		375	289	136.25	6	8	5	10	9	6	4	1	2	6	5

¹ = Not Available ² = First number (before /) is TA hours, second is travel time

Project and Administration Management

Exhibit A, Part 1 “Statement of Work”, Section 8 “Project and Administration Management”:

- a. Contractor will be responsible for an overall training plan and a technical assistance plan, and management and coordination of trainings.*
- b. Contractor shall participate in a minimum of two regularly scheduled monthly phone or in-person meetings with DHS staff to discuss updates on progress of Online Module development.*
- c. Contractor is solely responsible for furnishing all necessary supplies, materials, script, equipment and services, and anything required or appropriate to provide the services specified in this Contract with the (specified) exceptions.*
- d. Contractor shall make Key Contractor staff available to DHS staff up to four times per Contract year (1/1-12/31) for in-person visits to discuss Contract progress. Agenda will be determined by mutual agreement of DHS and Contractor.*
- e. Contractor shall make Contractor’s staff available within two business days to Contract Administrator or delegated staff to discuss any critical matter that impacts the continued delivery of services.*
- f. Contractor shall ensure access to subject matter experts for technical assistance delivered to DHS staff or delegates.*
- g. Contractor will deliver a quarterly list of training participants, locations, and a quarterly list of those participants that have completed the OELN series and have been issued either an ACRE or DHS OELN Certification, starting June 29, 2018 through June 30, 2020.*

Contract #156385, Amendment Number 1, Section 8

Training Plan and Reporting. At the start of the project Wise developed a training plan for the period January through December 2018, in order to get seminars scheduled, announced and started as soon as possible. Wise delivered quarterly lists of training participants and locations, as well as a quarterly list of those participants that had completed the OELN series and had been issued either an ACRE or DHS OELN Certification, starting June 29, 2018 through June 30, 2020.

Administration Management. Wise participated in all scheduled monthly phone or in-person meetings with DHS staff to discuss updates on progress of Online Module development. Wise furnished all necessary supplies, materials, script, equipment and services, and anything required or appropriate to provide the services specified in this Contract with the (specified) exceptions.

Wise made Key Contractor staff available to DHS staff as requested for in-person visits to discuss Contract progress. Agendas were determined by mutual agreement of DHS and Contractor. Wise made Contractor's staff available within two business days to Contract Administrator or delegated staff to discuss any critical matter that impacted the continued delivery of services.

Deliverables related to Project and Administration Management: Completed

Project Impact and Recommendations

During the contracted period, this project substantially met employment service in-person training needs for entry-level personnel in Oregon, as well as establishing an online system for introducing supported employment concepts and strategies for individuals new to the program. This training framework is sustainable if DHS regularly maintains and updates it to meet the changing needs of the business community and to support the career trajectory of people with disabilities who are using the services. With the Online Modules and a consistent in-person professional development training system, that includes other training opportunities, Oregon will continue to see increased employment outcomes.

Conclusion

This report represents the Final Report summarizing activities conducted by Wise under Contract Number 156385 and its amendments. Together, the range of activities completed by the Wise Employment First Statewide Implementation Project has addressed needs particularly related to expanding awareness of the benefits of employment and expanding provider and community capacity to achieve the desired employment outcomes. The report confirms and verifies that all requirements have been met for this contract, effective between January 1, 2018 and December 31, 2020.

As discussed above, the Online Modules developed under this contract provide a strong basic introduction to Employment First topics, making them especially valuable for those new to the field. If these Modules are updated to stay current, edited to encompass new information and techniques, and continually monitored for functionality and quality, newly hired employment specialists and other stakeholders will have immediate, ongoing access to basic information and understanding of supported employment in Oregon. The online nature of the Modules will be particularly helpful as the field rebuilds and gears up to return to in-person services after service limitations due to Covid-19.

The potential feedback DHS gathers from the Modules could offer one form of valuable information, along with other indicators, for planning for overall training and technical assistance to community providers, families, and others. WISE recommends that DHS continually review the feedback, not only from the Modules, but from providers in the field, as

they work to serve better and serve more of their community members with intellectual and developmental disabilities (IDD). There will be an ongoing need for a significant level of training opportunities of different types to meet the needs of service providers and others in Oregon. The Job Coaching Guides that are included in the Online Module project within this contract are a good step forward in ensuring that more in depth, focused training opportunities will be made available going forward.

In person training opportunities afford employment specialists and associated stakeholders with opportunities to network, share innovative practices, create community and ultimately better serve Oregonians with IDD. The same is true for more advanced types of training that help retain practitioners in the field, increase the diversity of who our system can serve, and foster leadership in the supported employment movement. Ensuring that Oregon has highly qualified staff throughout the state to meet the full range of employment support needs of individuals with developmental disabilities must be an ongoing investment.