
Information & Technical Assistance Center for Councils

2008 Technical Assistance Contract Work Plan

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| ■ Principal Investigator | Karen Flippo (KF) |
| ■ Project Director | Sheryl Matney (SM) |
| ■ TA Specialist | Valerie Billmire (VB) |
| ■ Office Manager | Pat Brown (PB) |

Task description	Task due date	Task deliverables	Task performance indicators	Task methodologies/strategies	Proposed budget	Staff responsible
1.1 Orientation Meeting	October 10, 2007	All contract items discussed	Key personnel attended meeting	Schedule with FPO and attend face to face meeting; discuss funded TA contract	Staff travel, personnel	Matney, Flippo,
Meeting will be held with newly hired CEO for NACDD.						
1.2 Annual Strategic Meeting	November 30, 2007	Initial Work Plan is refined.	Required attendees meet at federal offices; agenda is comprehensive and includes all TA Contract activities including products, recommendations and important dates.	Schedule with FPO and attend meeting with FPO and other federal staff, TA Director, TA staff, and Center Advisory Committee. Meeting agenda includes delivery of technical assistance, date/location of TA Institute and meetings. CAC will be included via conference call.	Staff travel, personnel, conference call	Matney
1.3 Monthly Meetings with FPO	By the 5 th of each month	Work plan status is assessed.	Meeting to access contract status is held.	Summary of prior month activities and other items for discussion is submitted to FPO, conference call meeting is held.	Personnel, conference call	Matney, Flippo
Meetings will be held the first Friday of each month. Completed meeting on 1/4/08; 2/1/08; 3/7/08; 4/4/08;5/16/08; June meeting will be accomplished during Quarterly Advisory Committee meeting to be held 6/10/2008						
2.1 Work Plan	October 14, 2007	Initial work plan	Initial work plan is submitted to FPO.	Initial work plan is developed using SOW, proposal, negotiated issues and information from the orientation meeting.	Personnel	Matney
2.2 Monthly updates to work plan	By the 10 th of each month	Updated work plan	Updated work plan is submitted to FPO	Assessment of work plan status and recommendations for updates as necessary will be discussed with FPO.	Personnel	Matney
Update – on the 1/4/2008 meeting; participants want work plan posted to ITACC web -site						

Work Plan DRAFT
As of 5/30/08
Contract

ADD Technical Assistance

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2.2 FPO initiated adjustments to work plan	By the 10 th of each month	Updated work plan	FPO adjustments to work plan will be reflected	FPO will request adjustments to work plan during monthly meeting.	Personnel	Matney
2.3 Strategic Review of the Work Plan	July 30, 2008	Revised work plan	Revised work plan is submitted to FPO for approval.	Center Advisory Committee and FPO will meet to review, discuss and assess the work plan strategically.	Personnel, conference calls	Matney, Billmire
ITACC Advisory committee reviewed on 12/20/07.						
2.4 Conduct of T/TA activities and Cultural competence plan	October 14, 2007	Cultural competence plan.	Cultural competence plan is submitted to FPO.	Development of cultural competence plan to ensure technical assistance activities and tasks encompass cultural diversity and competency.	Personnel	Matney
Completed during FY 07 Contract.						
3.1 Establish Advisory Committee	November 1, 2007	Advisory Committee is established	Proposed Committee members will be submitted to FPO for approval	Call for interested persons to serve will be placed on existing list-serve and through electronic mail. Solicitation to serve will be made to Council members, Council directors and staff. 50% of members shall be individuals with DD and family members of persons with DD.	Personnel, list-serve, electronic mail dissemination	Matney
Dave Zwyer (ED, Ohio) and Kevin Burrell (Staff member, PA) were appointed by the FPO to serve in FY 2008. Recruited Shari Cooper, Self Advocate council member from Ohio and Enrique Escallon from Florida during the Annual Conference. FPO approved recommendation on 12/3/07						
3.1 (a) CAC Plan	November 1, 2007	Committee member education plan	Education Plan is submitted to FPO for review and approval prior to dissemination to CAC	Develop education plan for committee members to address issues of turnover, meeting attendance, success of membership terms; goals and objectives of the TA contract and ADD	Personnel	Matney

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Update to plan completed 10/18/07.						
3.2 Regular Meetings with the CAC	Quarterly	Quarterly assessment of contract activities.	Meeting date, time and agenda items is developed with FPO. 3 meetings will be held via conference call, one meeting will be face-to-face	Schedule with FPO and CAC dates and times for meetings. Review of contract status and request for guidance on upcoming activities will be discussed as well as recommendations from CAC provided.	Personnel, Conference call, one face-to-face \$1,400.00	Matney, Billmire
Meeting to be held at 2:00 p.m. EST on 12/20/07. 2 nd Quarterly meeting held 2/11/08 at 3:00 p.m. EST; 3 rd quarterly meeting scheduled for June 10, 2008 following the TA Institute						
3.2(a)	Quarterly within 10 days following meeting	Summary	Summary submitted to FPO	Prepare summary of CAC meetings reflecting discussion and decisions regarding TA contract advice	personnel	SM
3.3 Communication with the CAC	Ongoing	Contract information	Relevant contract information is submitted to FPO for approval prior to sharing with CAC.	Compilation of relevant contract information.	Personnel	Matney
Update: 12/20/07 meeting information sent to FPO on 12/10/07 for approval. Meeting documents were approved on 12/11/07. Documents were sent to Advisory Committee members on 12/12/07.						
3.3 (a)	Ongoing	Minutes and annual evaluation	Meeting minutes will be distributed to CAC members quarterly. Contract evaluation will be distributed annually.	Minutes will be developed after quarterly meeting. Contract evaluation will be disseminated to CAC annually.	personnel	
Update: Draft minutes from the 12/20/07 conference call were emailed to FPO on 12/31/07. Meeting notes were emailed to all committee members on 1/8/08.						

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3.4 Logistics for the CAC	Quarterly	Quarterly meeting accomplished.	Meeting announcements, agenda and call in numbers/password is disseminated/meeting location is disseminated with prior approval from FPO	Conference call arrangements are made; on-site arrangements are made for face-to-face meeting.	Personnel, Advisory Committee, conference call	Matney
3.5 Acknowledgement of the Name for the Center	Ongoing	Acknowledgment of federal support, logo and name.	Activities and communications include acknowledgment of federal support with name and logo.	Application of blanket acknowledgment of federal support including Center logo and name will be utilized in all activities and communications.		Matney, Billmire, Flippo, Brown
4.1 Establish a unique name for the Center	November 30, 2006	Name	Unique name is submitted to FPO for approval.	Solicit input from Council members, Directors and staff through existing list-serve in consultation of FPO. CAC will recommend name.	List serve expense, personnel	Matney
Completed in FY 07 contract						
4.2 Develop Logo for the Center	November 30, 2006	Logo	Unique logo is submitted to FPO for approval.	Graphic artist is utilized to develop several logo choices. CAC will recommend final choice.	Graphic consultant	Matney
Completed in FY 07 contract						
4.3 Use of the name for the Center	ongoing	Name and logo used.	Usage of name and logo on all contract activities and tasks.	Application of name and logo on all contract products, updates, reports and materials.	Personnel	Matney, Billmire, Flippo, Brown
Public awareness of services offered during 2008 Contract was conducted during the Annual DD Council conference.						
5.1 Annual Assessment of	November 24, 2007	Annual assessment	Assessment tool is submitted to FPO for	Assessment tool is developed, disseminated, summarized and	Personnel	Matney

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State Council Needs			approval. Assessment is disseminated to 55 Councils. Summary and analysis is developed and submitted to FPO.	analyzed for utilization in key contract activities. Assessment will include probe to determine the extent to which Councils are being reached or not being reached.		
Update: Assessment tool approved by FPO on 10/2/07. Disseminated Needs Assessment during NACDD Annual conference – received 13 from Council Chairpersons, 21 from Council Executive Directors, 14 from Council staff members and 9 from Council members. Needs assessment send to all ED's, all Chairpersons' on 12/3/07						
6.1 Development of System for Requesting Technical Assistance	December 1, 2006 December 15, 2006	System	Request system is submitted to FPO for approval. Publicity of system will be ongoing to all 55 Councils through e-mail, list serve, web-site, fax, telephone and postal mail.	Develop request system with format that can be used on an ongoing basis in a variety of applications. System will include mechanism to process TA Plan requests to FPO within one week of receipt. Evaluation method will be developed and implemented.	Personnel and travel, consultant and honoraria costs \$30,600.00	Matney, Billmire, Flippo
Updated instructions to the TA Plan request on 11/21/07. Sent Utah request forward for approval 11/26/07 FPO asked for additional information regarding the projected number of other TA Plan requests that will address DD Suite related assistance. SM contacted Dan Shannon on 12/3/07 for information on projections – at this time, no additional information available. TA Plan request was received from the Oregon Council – sent to the FPO for review and approval on 12/18/07; Oregon approved in the amount of \$5,000.00 on 12/19/07. TA Plan request from MS Council – sent to FPO for review and approval on 12/19/07; MS approved in the amount of \$600.00. TA Plan request from the Ohio Council was sent to FPO for review and approval on 12/20/07; FPO approved with stipulation that additional information be collected on the evaluation section. Approved in the amount of \$1,200.00. TA Plan request was received from the Florida Council in the amount of \$325.00 – FPO approved on 1/28/07; TA Plan request from the Maine Council in the amount of \$1,300.00 received – FPO approved on 1/28/08; FPO approved the Utah TA Plan in the amount of \$2,000.00 on 1/30/08; TA Plan request was received from the New Jersey Council in the amount of \$1,200.00 – FPO approved on 2/23/08. Four Councils have plan requests in process; Wisconsin, Alabama, Nevada and Maryland. Alabama TA Plan completed in the amount of \$150.00; Nevada Plan approved in the amount of \$5,000.00; Maryland plan approved in the amount of \$3,300.00; TA Plan request from the Arkansas Council in the amount of						
6.2 Logistics for On-site visits	Ongoing	Logistics and consultants secured	FPO has received and approved all logistics and consultants for TA plan activities prior to	TA plans from individual councils are received, reviewed and discussed. Contractor prepares request for FPO.	Consultant Travel (TA Plans)	Matney

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			implementation	Evaluation of this process will be developed and implemented.		
6.3 Communities of Practice meetings	Ongoing	Logistics and consultants secured	FPO has received and approved all logistics and consultants for Communities of Practice Meetings prior to implementation	Community of Practice meetings will focus on fiscal operations, council member leaders, grant and contract management and data collection topics	Consultant Travel, logistics \$22,811.00	Matney Billmire Brown
<p>Update: Fiscal topical meeting planned for November 14-15, 2007 in Dallas, TX. Contract has been secured with the Embassy Suites Outdoor World. Janice Davis Caldwell has been secured to provide education. 48 people attended the fiscal workshop. Evaluations summarized. Chairperson/Member Leader Topical Meeting will be suggested for September, 2008 to be held in Salt Lake City, Utah (suggestion based on the results from the 2008 Need Assessment results)</p> <p>Data Collection/DD Suite will be conducted via web conferencing and one face-to-face opportunity in the New England area</p> <p>Grants/Contract Management – there will be a series of sessions offered on this topic during the 2008 TA Institute. DD Suite group is in the planning stages for their meeting.</p>						
7.1 Disseminate Information to State Councils	Ongoing	Information	55 Councils will receive ongoing information not produced by the Center.	TA Contract staff will solicit requests for information from Councils on a variety of topics. Topics may be recommended by CAC.	List serve, web hosting, personnel	Billmire
<p>Facilitated ADD-02B Web Conference calls on November 6th and 7th. 53 people registered to attend representing 38 Councils (69% of Councils participating). Added benefit – Councils utilized the audio and web technologies to access this information.</p> <p>Facilitated PPR Conference calls on November 29th and 30th.</p>						
7.1 (a) Disseminate information to new Council Chairpersons	Ongoing	Information	New Council Chairpersons will receive information about the ITACC web-site and services, New Chairperson information guide and web guide	ITACC staff will solicit names of new Chairpersons from NACDD and provide timely welcome and overview of TA Services		Billmire

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7.2 (b) Disseminate information to new Council Executive Directors	Ongoing	Information	New Council ED's will receive information about ITACC services, Info guide and Web Guide	ITACC staff will solicit names of new ED's from NACDD and provide timely welcome and overview of ITACC Services		Matney
7.3 (c) Disseminate information to new Council Members	Ongoing	Information	New Council members will receive information about ITACC services	ITACC staff will solicit names of new Council Members from NACDD and provide timely welcome and overview of ITACC services		Billmire
7.2 Establish a website for the TA Entity	March 30, 2007	Web-site	Web design, web pages and content will be submitted to FPO for approval.	Utilizing assessment information, develop web-site content. Utilize web-site designer to build web-site in compliance with Section 508 accessibility. Topical pages will be developed including previous TA contract web based materials	Web designer consultant, personnel Costs: see 7.5 (d)	Matney, Consultant
Update: 1 st set of ITACC updates sent to Teri Blankenship and changes made on 12/17/2007. VB completed review of Chairperson web-guide on 3/31/08 – multiple changes submitted to Teri for updating.						
7.3 Establish listerv(s) under the Center	March 30, 2007	List –serve(s)	A minimum of one list serve will be functional and inclusive of FPO and her designees.	Establishment of Center list-serve; include Center logo and name in a banner; develop and disseminate list serve etiquette; moderate list-serve.	\$180.00 personnel	Matney, Billmire
Update: 70 current members of ITACC List serve (3/7/08); 80 current members of ITACC List serve (4/4/08)						
7.4 Rapid Response	October 1, 2007	System	Itemized requests by topic shall be included in FPO monthly report and discussed in monthly contract status	Develop system for requests made by Councils and ADD. Implement tracking system for requests. Analyze trends among types of requests	Personnel	Matney, Billmire

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<p>October – 11 requests and responses; November – 6 individual requests and multiple ADD-02B PPT requests. December – 5 requests and responses; January – 7 requests and responses; February – 9 requests and responses; March – 13 requests and responses</p>						
<p>7.5 (a) Develop guide to state councils for Council members</p>		<p>Guide</p>	<p>One guide to be submitted to FPO for approval.</p>	<p>Solicit volunteers from Council members who are individuals with developmental disabilities and family members to serve on an advisory team for this product. Contract with self advocates who are leaders in the field to provide technical assistance. Develop content and guide collaboratively.</p>	<p>Personnel, conference call</p>	<p>Billmire</p>
<p>Guide final draft was received by SM on 12/5/07. Reviewed and returned to VB on 12/31/07 for clarification/revisions. VB sent final draft of Council guide to FPO on 1/22/08. FPO and ADD staff will review and discuss in March. Feedback on guide received 4/18/08 and revisions were made and returned to ADD on 4/30/08 for additional review and feedback. Guide approved by ADD on 5/15/08 – staff will insert copies of new product in all packets at the TA Institute and post on web-site.</p>						
<p>7.5 (b) Fiscal Manual for Councils</p>		<p>Manual include info specific to council members</p>	<p>One draft manual to be submitted to FPO for approval.</p>	<p>Solicit volunteers from Council members, directors and staff to serve on advisory team for the development of this manual. Collaborate with ACF/ADD staff responsible for fiscal requirements of Councils. Develop draft manual with advisory team and ACF/ADD staff.</p>	<p>Personnel, conference call</p>	<p>Matney Craig Hall, Cathy Lyle, Janice Davis Caldwell Jocelyn Gridley, Hendricks; Swinford, Webb</p>
<p>Update: Workgroup will begin meeting again in 2008. Content page and 1st section drafted by SM; Priority will be given to this product in April 2008. Draft in progress sent to workgroup members for feedback.</p>						

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7.5 (c) Other TA Materials		Materials	Materials will be submitted to FPO for review and approval	Identification of need for additional materials will include input from stakeholders, the CAC and FPO.	Personnel	Matney, Billmire
7.5 (d) Refresh existing Web based education materials 1) ED Web Guide 2) ED Info Guide 3) Chairperson Web Guide 4) Chairperson Info Guide		Updated products posted on web	Materials will be submitted to FPO for review and approval prior to posting	Review existing materials, determine changes with guidance from stakeholders, CAC and FPO	Personnel and web consultant \$6,000.00* *include 7.5(e); 7.2	Matney Billmire
Update: ED Info Guide - update on financial reports and ADD Central Office staff in process. Jocelin Gridley will assist SM with verbiage for financial report paragraph. Review of Chairperson web guide completed by VB 3/28/08; Review of Executive Director web-guide completed by SM on 3/28/08. Updates are in progress and changes are continuing to be made weekly.						
7.5 (e) Council Member Web Guide		Web guide posted	Materials will be submitted to FPO for review and approval prior to posting	Member Guide work team will be developed. Collaborate with ADD staff. Develop web guide.		Billmire
Billmire and work team will recommend best method for posting material on the web (simplified for easy access). VB will have an outline ready by 4/30/08.						
7.6 Technical Assistance Institute	June 2008	Institute	One 2 day Institute will be scheduled, planned and implemented. FPO will review and approve all plans.	Institute planning will include the CAC and FPO. Sessions will be identified and speakers will be recruited; logistics and public awareness will be developed	\$26,620.00 TA Institute, personnel, conference calls, staff travel	Matney, Billmire, Flippo, Brown
Update: The Westin Gateway Arlington has been secured as the hotel site. The dates are June 9-10, 2008. Planning committee approved on 1/11/08; first meeting scheduled for 1/18/08. On-site visit conducted by SM, VB and PB on 1/16/08. Planning meeting held 2/1/08; 3 rd meeting held 2/26/08; 4 th meeting to be held Wednesday 3/19/2008; 5 th meeting to be held Wednesday 4/9/08 at 9:00 a.m. EDT;						
7.6 (d) Accessibility Advisory Team	Ongoing	Team is recruited and operational	TA Institute site and surrounding area is reviewed and	Solicit volunteers who have personal knowledge of accessibility issues. Perform	3,500.00	Billmire

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<p>evaluated for the purpose of providing TA Institute planning team and participants accessibility information</p> <p>on-site visit to determine needs and serve as on-site guides for accessibility issues</p>						
<p>VB recruited 6 people with developmental disabilities willing to serve on the Accessibility Advisory Team during the 2007 Annual Conference. FPO approved one of three submitted and requested contractor to seek additional self-advocates from the D.C., Maryland or Virginia Council to reduce travel. Met with VB on 1/8/08 to discuss next steps – VB will prepare an activity plan and contact MD, DC and VA for recommendations on people to assist – this on-site activity prior to the event will be complete no later than 3/31/08. Clint Martin from West Virginia (Council Member) and his support person Lee Diddy; Kara White from Virginia (staff); Kathy Cargill-Willis (ADD); and FPO will participate on the team. FPO approved team participants on 1/30/08. Dates for the onsite visit will be March 13-14. Accessibility Advisory Team document prepared and submitted by VB on 3/28/08. Guide approved on 4/18/08 and will be provided to TAI attendees upon registration.</p>						
<p>8. Other emerging Technical Assistance needs</p>		<p>Update work plan</p>	<p>Plan for emerging TA need will be incorporated into work plan.</p>	<p>Gauge emerging needs through assessments, feedback from PAC, surveillance of national trends, requests and discussion with Council directors, staff and members, guidance from the FPO and other mechanisms. Once need is identified, FPO and TA Staff will develop plan for TA.</p>	<p>Personnel</p>	
<p>ADD-02B Financial Reporting Education Web Conferences were held November 6, 7, 2007; PPR Conference Calls were held on November 29, 30, 2007 Provided teleconference on: Customized Employment 10/15/07. Made TA Conference line available to Councils interested in talking about Waiting Lists (Brian Cox convened the call) NPRM was released on 4/10/08.</p>						
<p>9.1 Developing approaches to Collaboration</p>		<p>Collaboration materials</p>	<p>Actively participate with DD Network TA partners. Follow lead of P&A TA Director.</p>	<p>Collaborate with UCEDD and P&A TA entities to address issues related to collaboration across the DD Network.</p>	<p>Personnel, staff travel</p>	<p>Matney</p>
<p>Update: SM spoke with Nachama Wilker on 10/12/07 re: dates for face-to-face meeting with her and Maggie. SM participated in conference call with Maggie and Nachama on 10/30/07 to discuss agenda for 11/7/07 meeting. Communicated with Maggie and Nachama on 1/8/08 about next steps for this activity in 2008. De-briefing call with ADD will be held on 4/25/08 at 10:00 a.m. EDT.</p>						

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9.2 Joint Meeting		Joint meeting	Planning activities will involve the FPO and Center staff will receive approval prior to implementation.	Work with UCEDD and P&A TA entities to develop and implement a joint meeting across the three programs once every 3 years for Executive Directors, Council members and staff.	Personnel, staff travel	Matney,
<p>Update: SM participated in face-to-face meeting at the ADD offices on November 7, 2007 to discuss this activity. Second face-to-face planning meeting for this activity will be held February 22, 2008 in Silver Springs, MD. Due to severe ice/snow storm, meeting was held via conference call. ITACC will utilize PB to perform a hotel and meeting room search in the DC area for the first two weeks of May, 2009. Other results of the meeting included charge for the planning group and possible dates for a call. ADD will be briefed via conference call on the status of this activity. Recruited volunteers to serve on the planning committee for this effort. Roger Webb, TX; Ed Holen, WA; Claire Montanya, UT; Anna Lobosco, NY volunteered to serve. Received hotel spreadsheet from PB on 4/10/08. SM sent to Nachama Wilker and Maggie Nygren on 4/10/08. Recruited additional member to serve: Vendella Collins, MI; next meeting will be June 26, 2008 via teleconference.</p>						
10.1 Monthly Report	10 th of each month	Monthly report	Written report and work plan spreadsheet will be submitted to FPO.	Develop report in narrative that provides a description of activities for the last month, status of tasks, and updates on all aspects of the work plan. Assessment of the prospect for achieving contract activities will be provided. An updated spreadsheet format of the work plan will also be provided	Personnel	Matney
10.2 Financial Reporting	20 th of each month	Monthly voucher	Voucher is submitted to FPO electronically and hard copy.	Compilation of all expenses in detail will be prepared. Contractor will utilize accountant to compile.	personnel	Flippo, Matney, Brown
<p>Update: October and November invoices approved with exceptions. December invoice approved after revisions for travel per diem rates. New travel voucher developed by PB and implemented for April voucher.</p>						
10.3 Development of the Annual Report	August 30, 2008	Report	Draft report is submitted to FPO for review and approval.	Summarize information/data on programs served and services provided, summarize problems encountered in the conduct of the contract, summarize	personnel	Matney, Billmire

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				deliverables under the contract, and recommend additional or revised approaches to address training and technical assistance needs of the Councils.		