



Writing Quality PPRs

Nachama Wilker, NDRN
Crystal (Beelner) Rasa,
GAO
Shawn Callaway, AIDD

Poll #1

Tell us all the ways you are engaged with the PPR?

- I prepare a PPR for of our P&A.
- I oversee the PPR process.
- I write up cases.
- I use it for internal accountability.
- I use it to tell the story of our P&A.

Learning Objectives

- Recognize three types of information that the federal funders get from the PPRs.
- Name four questions that should be answered by every case example in a PPR.
- Pinpoint three ways that you could improve your agencies PPR.

Purposes of the PPR

- 1) Federal compliance and reporting
- 2) Diagnostic tool to examine local needs
- 3) Internal accountability tool – esp. PAC PPR
- 4) Public Relations
- 5) Public Policy

Federal Reporting

- Statutory requirement
- Accountability for use of federal funds to meet program mandates
- Formal communication mechanism with program offices
- Informs compliance monitoring
- Opportunity to explain unmet goals

What are the agencies looking for?

- Does your PPR reflect the work of your agency?
- Are you in compliance?
- Are you collecting and reporting data accurately?
- Do you explain unusual trends?

PAIMI AC PPR

- Completed Independently by the PAIMI AC
- Provide assessment of priorities and objectives
- Story of PAIMI AC role in the program
 - Training
 - Activities

High-quality work reflected in PPRs

- Outreach to underserved populations
- Individual casework and systemic interventions to create change
- Presence in a range of settings
- Diversity of media outlets for education and outreach
- Advocacy and legislative initiatives

Concern: Data collection

- Lack of relevant and clear data:
 - *“probably don’t have numbers correct.”*
 - Numbers don’t add up.
 - Mathematical errors prevalent.
 - Numbers incomplete or not measuring the same thing.
 - Numbers inconsistent throughout report.
 - Charts not filled in.
 - The number of cases and number of case problems must be differentiated.

Concern: Case numbers

- Unclear counting of individuals and cases:
 - *“may not be giving themselves credit for number of cases they serve.”*
 - If number of people served is low, explain why.
 - Be careful you are not underreporting
 - Make sure staff at the P&A all count cases the same way.
 - Record individuals, do not round up or down.
 - Review your internal record keeping for inconsistencies.
 - One reviewer questioned if inaccurate case numbers were in error or reflected inadequate ability of staff.

Practical Tips: Data collection

- Run PPR data at mid-year (end of March)
- Compare data with projected priorities and objectives for the year
- Separate advocacy on behalf of individuals into separate “cases”

Poll 2

- Do you run PPR data more than once year?
- If you run it more than once a year, do you run it
 - Mid-year
 - Quarterly
 - Monthly
 - Other

Practical Tips: Data collection

- Explain clearly when a goal is not met
- Example: Goal for discharge of children from hospitals
 - This objective is challenging to meet because children have multi-faceted barriers to discharge. The GAO has worked to deflect the institutionalization of many children this year in Georgia as well as advocated to bring children in facilities out of state home.

Narratives

- Narratives not written clearly:
 - *“work on writing report rather than cutting and pasting case notes.”*
 - *“not sure this report is the best that they could do.”*
 - Make narratives easy to read and follow.
 - Clarify in narrative if goal was met/unmet/partially met.
 - Review narratives for grammatical errors.
 - Make sure reports are easily understood by individuals unfamiliar with the programs.
 - Avoid unexplained acronyms.

Practical Tips: Narratives

- Ask advocates and attorneys to write a narrative when closing the case
- Edit the narratives as soon as possible to avoid editing so many in December
- The broader the impact of the narrative, the better
 - Example: Class action lawsuit stemming from individual advocacy.

Practical Tips: Narratives

- Use narratives with a wide range of remedies
 - Technical assistance (stories about self-advocacy are powerful to all audiences)
 - Litigation demonstrates the significance of the P & A's legal advocacy
 - Mention barriers and remedies to access issues to demonstrate the value of the P & A's access authority
 - Discharge from hospital (barrier to access in advocacy)

Practical Tips: Narratives

- The P & A is an integral part of the State of Georgia Emergency Preparedness Coalition for Individuals with Disabilities and the Elderly. The working group consists of the American Red Cross, the Brain and Spinal Cord Injury Trust Fund, the Disability Resource Group, the Emory Center for Public Health Preparedness, the Georgia Advocacy Office, the Georgia Department of Human Resources, Office of Facilities and Support Services, Division of Aging, DBHDD*, Division of Public Health, the Georgia Emergency Management Agency, the Georgia State Financing & Investment Commission-State ADA Coordinator's Office, the Governor's Council on Developmental Disabilities, the Southeast ADA Center, the Statewide Independent Living Council, and Tools for Life, the State Tech Act Agency.

*DBHDD is defined previously in the report.

Poll 3

- Does your P&A train staff to write good narratives ?
 - Yes
 - No
- If yes, are you willing to share your trainings with others?
 - Yes
 - It is not written down

Concern: Priorities/SGPs

- PPRs must demonstrate achievable goals and outcomes:
 - *“Impressed with PPR; goal oriented and highly productive; one of the few PPRs that you could actually see what they are doing.”*
 - *Develop attainable goals.*
 - *Create concise objectives with measurable targets.*
 - *Link goals to P&A programs and consumer input.*

Concerns: ADD SGPs

- Incomplete or false financial appropriations for each priority/goal
- Lack information on underserved/minority populations served
- Limited number of individuals with developmental disabilities and individuals from diverse ethnic background on Boards and Advisory Councils
- Make sure goals from SGP match PPR reports

Concerns: Priorities continued...

- Concerned that goals were:
 - Too broad/ far-reaching.
 - Too general to draw conclusions.
 - Not clearly worded.
 - At time, administrative rather than programmatic.
 - i.e. goal of increasing diversity of P&A staff.
 - Repetitive
 - i.e. if many goals within P&A involve outreach, condense into an outreach goal with sub-categories.

Concern: Compliance

- Make sure to fill out entire PPR correctly:
 - *“No grievance report given in PPR. Even if no grievances, report still required.”*
 - Complete all sections of the PPR.
 - If unsure of certain sections, ask for technical assistance.
 - Protect client confidentiality.

Reporting on Collaboration

- Consult with partners re: reporting on required collaborations
- Include relevant information in case narratives
- Consider including collaborative efforts with other significant partners

Practical Tips: Getting Started

- Keep “Folders” in email
 - Legislative Advocacy
 - Media
 - Casework narratives
 - Training and Outreach
 - Systemic Advocacy
 - Specific projects within your agency

Getting Organized

- Do you have other tips for organizing your PPRs that you can share?
 - Put them in the chat box or make a note of them and we will come back to these at the end of the session

Constructing casework examples

- Connect case examples to priorities.
- Provide a diverse set of examples to show the diversity of work within the agency.
- Ensure the examples show service to the target population of each program.
- Start with a topic sentence that defines the issue, describe the action taken, and follow up with the outcome.

Casework, continued.

- Assume the reader is not familiar with your P&A, state agencies or facilities in your state.
- Write out acronyms and abbreviations.
- Use simple terminology- avoid jargon readers may not understand.
- Keep the identity of consumers anonymous:
 - Use “person,” “individual,” “client.”

Casework, continued.

- Use a variety of cases as examples to show the range of work done in your agency. Using one case, even if it is a good example of many issues, can lead the reader to believe you only have one example to point to.
- Stay neutral- avoid emotionally charged or judgmental language.

Evaluate Case Example

- What is the Problem ?
- What did the P&A do to solve the problem ?
- What is the Outcome ?
- What are the Next Steps, if any ?

Good case example

- The P&A represented a client with a severe cognitive disability who lived in a group home. She was injured when group home staff left her in the shower with water running over her face for more than an hour. Due to her disabilities, the client was unable to remove herself. A PADD attorney represented the client in filing suit against the owner of the group home and the client obtained a financial settlement for her injuries.

Indistinct Example

- P&A was contacted by a 28-year-old who receives SSDI and who was having trouble finding transportation to work. They contacted DRSN asking for assistance with this and for help understanding how working impacted their SSDI benefits. The PABSS Advocate advocated for VR to purchase reliable transportation to and from work for client. The PABSS Advocate also explained to client SSA benefits and how work can affect those benefits.

Case Example One:

- Disability Rights State Name (DRSN) provided assistance to a 31-year-old individual with cerebral palsy after he was terminated from his government agency position. The individual requested accommodations shortly after being hired and during trial work experiences, but none were provided by his employer. This resulted in difficulties for the employee in trying to navigate around the office and complete assigned tasks in a timely manner. DRSN assisted the individual to file a complaint against the employer and provided administrative law hearing representation that resulted in a ruling in favor of the employee. As a result, the employer was ordered to pay a state fine and provide back pay to the employee.

Exercise

Does the previous case examples answer the following questions:

- What is the problem in the case?
- What did the P&A do to solve the problem?
- What is the outcome?
- Are there any next steps?

Poll #4

- Did Case One answer the important questions?
 - Yes
 - No

Case Example Two:

- CAP cases customarily include clients experiencing frustration with the bureaucracy that may come with working within the constraints of an unfamiliar system. During the past year there have not been any cases overtly more exceptional than others. CAP cases generally encompass individuals requiring additional information concerning the workings of the system in which they find themselves, support to advocate for their specific needs, and at times, empowerment to move forward with their needs via informed choice and individual and systemic advocacy as needed.

Exercise

Does the previous case examples answer the following questions:

- What is the problem in the case?
- What did the P&A do to solve the problem?
- What is the outcome?
- Are there any next steps?

Poll #5

- Did Case two answer the important questions?
 - Yes
 - No

Data in PPRs

- Use comparative data.
- Tie individual case examples to the data.
- Use data in case narratives whenever possible-
 - Number of individuals served, issue areas addressed, etc.
- Ensure staff are collecting data consistently across the board.
- Use a calculator to double-check all numbers.
- Add down and across.

Data, continued...

- Explain if there is little activity or significant change in any issue areas.
- Explain why particular target numbers were chosen.
- If goals were unmet, describe any resource inadequacies, restrictive program criteria, or other impediments such as external changes, i.e. the recession or veterans returning from the wars in Iraq and Afghanistan.

Priority Setting

- Identifies current trends in who is being served.
- Shows who was *not* served.
- Documents goals versus outcomes to demonstrate effectiveness of previous year's priorities.

Practical Tips: Training & Outreach

- Gather information all year long
- Catch any correspondence about training and outreach in an email folder
- Keep minutes from meetings

Management tool/ Quality control

- Shows the effectiveness of casework:
 - Identifies best practices and areas that need improvement.
 - Does casework reflect priorities?
 - Do remedies reflect clients' issues?
 - How do your case numbers compare with your expectations?
 - Trends in work and programs.

Public Relations

- Compilation of annual statistics is a good opportunity to reach out to the press.
- PPR supports P&A annual report.
- The PPR can be used as a tool to highlight changes in trends.
- Stories and statistics are readily available for responses to press inquiries year-round.

A few final thoughts

- Before submitting PPRs, make sure the reports accurately represent the work your agency does.
- Have a writer and an editor
- If you are unclear about any part of the PPR process, please contact TASC or federal agency for help.

How did we do?

- Please submit an evaluation to the training via the following web link:

<http://www.surveygizmo.com/s3/1406686/ppr>

Training and Advocacy Support Center
National Disability Rights Network
900 Second Street, NE, Suite 211
Washington, DC 20002

Tel. 202-408-9514 ♦ Fax: 202-408-9520 ♦ TTY: 202-408-9521
www.tascnow.org