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Welcome to the writing quality PPR conference call. My name is Trish I will be your operator for today's call at this time all participants are in a listen only mode. Later we will conduct a question and answer session. I would now like to turn the call over to Nachama Wilkier. Please go ahead.

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Thank you, Trish. And thank you, everyone for joining the webcast this afternoon or morning, depending on where you are on writing quality PPR's. I am Nachama Wilkier, deputy executive director for training and technical assistance here at the national disabilities right network joining me today is crystal Rosso, who is the director of the program and PPR goddess at the Georgia advocacy office, Crystal is having a little bit of problems with her WebCam which we hope will be fixed. And she is working on it but we did not want to stop the webinar so we are just going to keep moving forward. This call is being recorded, and we will send the recording out to those who register for the call as soon as the call is complete and post it on NDRN website within the next two days you should have all receive the PowerPoint and the handout for this webinar but if you didn't if you are interested in downloading it there is a box on the up for right-hand corner of your screen if you are on the computer screen, called materials to download. Writing effective PPR's is the PowerPoint and the second document which we shared with you with annual reports to Congress prepared by the dare program it is a draft, it does give you an example of what the feds within the program and I would say we agree as well, are well-written narrative so just some more examples for you. Participants are muted until the presentations are over but that doesn't mean that we don't want you to participate there are three ways you can participate -- not participate -- those of you on the web can communicate with us and each other via the check box on the lower right-hand corner. And we will be monitoring that throughout the discussion. For those of you on the phone

only you can ask -- and anyone else can ask questions at the end of the presentation. The third way is we are trying out pulling and some of the games here that are available to us through Adobe connect -- polling -- if you are on the web, you will see the polls, most are in the PowerPoint so those of you participating only on the phone will see what kinds of questions we are asking people. You can respond if you would like when we open up the discussion. For those of you on the web you will see a sample here on your right which is a question is this how your office chooses to get to write the PCR narrative. I was referring to the rock paper scissors game that we just saw on the web and now if you click on an answer you can click yes, click no, click no comment or you can click no vote now you see people are responding to the poll and you saw and the votes before it disappeared that you can see where the answers are. And that 36% said no infected this is not how they choose who will write the CPR in their office one person did say this is how they decide who gets to write the PPR in their office and nine people or 52 -- almost 52% of those who answered had the no comment answer. That just gives you a sense of how we are using the poll and hopefully add a little humor to the beginning of this presentation. Crystal?

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Hi. This is Crystal Rosso I apologize we had a technical glitch and I am in the process of changing computers so I apologize. If you can hang on just a minute I promise we are up and ready a few minutes ago, so I honestly -- I can't see the PowerPoint in front of you for this -- I will just keep going when you are ready --

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Keep going I will e-mail and I am on.

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This is the first pull we would like you to participate in and I appreciate a lot of people are already responding to it. We are asking you to tell us all the ways you are engaged with the PPR and you can click in this Jack -- in this example more than one option. So we have at this point about 79% of the people on the call prepare a PPR for your PNA, 40% of the people on the call oversee the PPR process, about 50% of the people write up cases, 23.5 percent use it for internal accountability and 61 percent use it to tell the story of the PNA which is very encouraging. We are going to leave it up and ask you to continue to feel it in if you are on the web and haven't done it and while we do that we want to talk to you a little bit about what we expect to talk about today and what we hope will come out of the session. I should have said although it is probably obvious to everyone at this point none of the federal participants you intended to be on the call and to do the presentation with Crystal or I are on the call because they are all on unpaid furlough.

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We didn't put this presentation together with the inputs of the program officers predominantly from a IDD which is administration on intellectual and development of disabilities who run the PAD program, the center for mental health services staff who run the [indiscernible] program and the staff from the 18 program at the Department of education. So their comments and feedback are part of what we are giving you here today as well as our experience here at NDRN where I know it might be surprising that there is Crystal -- hi, Crystal, I know it might be surprising to you but we actually read all of your PPR's every year and also Crystal experienced at the Georgia advocacy office preparing PPR's kind of overseeing the process in her office. We also have an integrated response that we got last year from some people on the call and other trainings we have done. You see a lots of different ideas here about what build a good PPR together. In addition we are hoping you will be able to name four questions answered by every case example in a PPR to sort of give you a structure of how to think about this and to pinpoint three ways you could improve your agency PPR.

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The purpose -- PPR and just before we move on I will just say again just before we close the poll here that thank you everyone for participating in the poll I think it is helpful to see that there is a good mix of people throughout the participants of people who both prepare PPR for the PNA of 80% and 65% who use it to tell the story of our PNA which is very encouraging for my perspective. 45% of participants also said they oversee the PPR process and write up cases and 20% said they use it for internal accountability. That is great because as we get into with the PPR is used for and you can close the poll thank you very much you see that many of the things in the poll that people are doing are in fact uses that the collective wisdom the feds and MDR network believe are the purposes of the PPR. They were created as a fellow -- federal compliance and reporting document and I will talk about that next. They can also be a diagnostic tool to examine local needs not only needs within your agency, but needs within your state. It is an opportunity that many PNA's really step back and look at the work you have been doing over the year in terms of putting together. Their are clearly an accountability tool, SAMHSA things of the PPR as an accountability tool for the program. That is the advisory Council to the feedback to the feds and to the program about how the program is doing that as an internal external accountability tool and internal accountability also as a management tool and they will talk about that how they can be used that way. We also think they are incredibly important in terms of public relations and as a public policy to all of which we will get into in this presentation.

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Before we go further I want to talk about the federal reporting piece of this. I think everyone knows the PPR's are a statutory requirement and they give accountability for the use of federal funds to meet the program mandate they are a primary way and probably the only formal way that we as the PNA report both of the federal program officers and to Congress how we move -- how we use the money they give us and I suppose in the time when the federal government may reopen, it will be incredibly important for us to be able to tell the story of what we do in as compelling a manner as possible. It informs compliance monitoring as well and that may or may not be obvious to those of you who work on PPR's but when the federal project officers are getting ready to do a monitoring they do -- full of PPR's and

look at them as the story of your PNA and that is -- if there are things that they see in their mind raise questions or red flags those become red like they look for in your agency. And is an opportunity for the PNA to explain unmet goals. And we are going to talk about that more as we get into the presentation. So what are federal agencies looking for when they look at your PPR? They want to know whether you reflect the work of your agency. If they look at this PPR, does that match with what they know about your agency and does it give a sense of what they would expect an agency to do in the care program or the [indiscernible] program are you in compliance? Are all the cases [indiscernible] if your case that might have either gone to PAIMI -- -- PAIMI RPD that could've been written up -- rid of the different ways that was written more as a PAD that shows up in your PAIMI report that shows up as a compliance issue because it is not a PAIMI case. Are you collecting and reporting your data accurately? We will talk a lot about that and as we go on and to you explain unusual trends? If you have shifted to doing more systemic work or there has been a big change in something that has gone on in your state you can use PPR as an opportunity to tell your story.

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I just want to say a few words about the PAIMI advisory Council people are because the center for health services has a clear expectation which I am not sure is always clearly stated to the PNA's as we put it forward. See NHS expects the PAIMI advisory Council to complete the PAIMI PPR independently that doesn't mean they expect them to tie that up and mail it to the federal project offices that they expect what is written to be different from what is in the PAIMI report and expect it to be a reflection of how you're advisory Council program feels the program is doing. They want to see the PAIMI advisory Council attitude about the expect meant -- of your advice -- they want to understand what the advisory council role has been so they don't want a regurgitation of the PAIMI PPR, they want a PPR that talks about what the PAIMI advisory Council has done I think there are instructions are not always clear about that that's why we want to [Indiscernible--low volume] Crystal?

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Hi everybody thank you so much for your flexibility. I promise we actually ran through this a couple hours ago, made sure we were hooked that but anyway thank you. I work primarily on our PPR is here at the Georgia advocacy office with the support of the staff I have been doing this for a little while and I second all she has said. One thing she mentioned and I would like to point to one of the materials for download particularly relevant here when she was talking about what RSA, SAMHSA, a IDD and our funders may be looking for in our PPR's it is interesting because I think they all look for something a little different and we learned a lot by reading the [indiscernible] report from last year found it particularly interesting to read some of the stories that were highlighted it gave me an ID data -- idea of what they were actually looking for things that maybe I didn't think of before so I encourage you to all take a look at that. Talking about the high-quality work that has led to PPR's. We worked really hard all year, this is our opportunity to show our funders and others what we have been doing. We have a broad impact with the range of intervention strategies we are able to use as a network. This is our opportunity to talk about the outreach that we are able to use, a good opportunity to weave together how maybe a particular training to a group of parents then led to individual advocacy on behalf of the student which

then maybe led to some systemic work on related to a particular issue. It gives us an opportunity also to talk about different media outlets we have used. I mean that is growing every day, the type of media we are able to use, social networking and also all of the intervention strategies, systemic work, group advocacy that we are able to discuss and this is an opportunity to highlight things you are particularly proud of.

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We have such a high-quality rip afford to reflect on one of the things I've learned over the last few years is while I do want to report on everything I am able to narrow it down to a particularly successful story. We have had a couple of legislative issues we have worked on that have not been particularly successful. Now if there is a reason I would want to report out it for instance it came out of the case or led to some of the results I may highlighted that I think it is important we pick and choose what we write, carefully. As we know one little piece of our PPR can be pulled out and used out of context. The next slide is talking about the data collection. I have to be honest it has been more often than not that at least once a year after the PR's have been turned in and I am able to sit back a bit and relax, I get the call or e-mail that my number did not add up and unfortunately it does happen even when I have used my best intentions and even had someone look over the numbers. It is very important to make sure you have everything filled and obviously and have that up correctly, but make sure you understand what you are filling in. For example there is a particular chart on the PPR that confuses me each year and a half to go back to my instructions and read it -- I don't think it would hurt to ask someone else in your organization especially if you are the person who is doing all of the PPR's or several of them, to sit down either with you or maybe step away and go through that numbers with a calculator, add them up, make sure they add up and transpose across the pages one thing that can be confusing is whether is the number of cases and problems are different and also something I know I struggled with, sometimes when we are doing a really good job of capturing numerous cases for individual clients, sometimes it is confusing to make sure that you have the right number of clients and cases.

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That is why it might not hurt to have someone helping. The other issue people face, I know I have is underreporting our work. Not giving ourselves credit for the number of people we served or especially the number of cases. In the federal reviews we have when we are having [indiscernible] things like that we would always here we were underreporting our work. Making sure we were consistently reporting cases. For instance something and working right now for example helping someone obtain services from vocational rehabilitation which then can turn into assisting someone with the actual job they received and then the job supports they need on-the-job. That is not one case, that is actually a few service requests, making sure we keep a good record of that.

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Unfortunately, there are times when in a particular problem area or priority and objective, the number is low. We have to be very careful about explaining why. Sometimes that is a hard thing to fill out or explain. But, I think being clear, I go back to what Nachama says, sometimes something comes up during the year that may have changed the way we were doing advocacy or problem areas we were focusing on. Just being able to give an explanation of that, for instance one can Trina happened several years ago, that shifted our focus for a few months. We had to be very attentive to that situation. So, it may have affect did some of the numbers and just being able to explain that.

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Something I started doing at the request of my executive director here a few years ago is I started running all of the PPR data, not just the number of cases we closed but almost all of it at mid year. So, we can get a good snapshot of where we are and also what -- whether we are meeting not only our priorities and objectives, making sure we are covering all of the issues we have set out to do to make sure we are covering problem areas that we set out to address. Also, it is clear what we are working on and also to make sure people are updating their information and keeping separate advocacy service requests on behalf of of individuals. So that brings us to our next poll. Number two. Which is, do you run PPR data more than once a year? Some folks do it once a year, some people run it as an actual management tools let me do it more often the question is do you run your PPR data more than once a year and yes, midyear, end of year, quarterly, monthly, no at the end of the year and no vote. Let's take a few minutes and look at those.

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While you are doing that's I will just add a couple of points to what Crystal has talked about and of course first to apologize about the typo on the poll of course monthly not [monly]. One thing about pennies often many of us are trained in fields that don't generally use numbers to tell stories. So, people are not as comfortable looking at the numbers and expecting the numbers tell a story in the same way that the cases tell a story, and they do. We should not be afraid of the fact that the numbers tell a story that might appear negative if it is only about whether the numbers are going up and down. Up and down isn't necessarily the story, the story could be we expected this to be going on over here but then this happened and we were nimble enough to move over here and address the issue. To Trina is a great example Crystal raised where many states had one set of priorities that they would do that year and Katrina happened, the federal government close, other things happened that made you shift your priorities and what you were doing. So, I think all of those are important and there are usually at least one or two people in offices who are more comfortable looking at numbers and we really do encourage you to actually look at the numbers and not just the cases for those of you reviewing the PPR before they go in, to make sure the PPR's tell the numbers of the story because believe me, the federal project officer's and are reading the numbers first and so do members of Congress and their staff. They look at the numbers and they look at your cases so I can turn it back over to Crystal the limit to say one other thing which is that it is interesting we see of the people who responded to the survey 50% who responded -- not everybody responded, runs PPR quarterly and what we found was we talk to people about the PPR, those who feel more on top of the PPR's and feel like they have a better grasp they are

able to report cases throughout the year our PNA's that pull PPR's more than once a year. With a find is they sit down at the end of the year to write the PPR, the cases show up are the cases within the last quarter maybe the last half of the year and they miss or don't focus on the cases in the first quarter or first half of the year when in fact some of their best cases might have been during that time. So, this is something we found helps a lot of PNA's in putting it together and makes it much last stressful at the end of the year especially that time in December where that can be a very stressful time for peonies. So, I put that out as something for you to think about if that is not something your agency does. Crystal?

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Okay. So I think everybody is finished with the pool. So we are going to move over here and just tell me I would like to give an example of when a goal is not met. It does happen, I am sure it has happened for most PNA's, and we provided an example in our situation. A goal for discharge, specifically children in psychiatric treatment, psychiatric residential treatment facility. We have set out an objective around the number of young people that we have hoped to transition and while we didn't meet the actual number of children, being discharged, we were able to swing that because not only do we do individual advocacy on that issue, we do a lot of systemic work. So that is the explanation we gave. So I am going to turn it over to Nachama.

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We are going to shift now to talking about the narrative and we will spend a fair amount of time talking about constructing casework example. The narratives are a very important aspect of the PPR's. One of the things we often hear back from Federal project officers when they look at PPR's is it looks like cases are actually cut and pasted from case notes as opposed to being written as a story. When you look at the narrative and you want something easy to read and follow, that is obviously checked for grammatical errors and is understood by individuals unfamiliar with the program and not -- although there are standard acumen's we use don't use acronyms that aren't [indiscernible]

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Something we implemented over the years is asking folks to write the narrative when they close the case. I actually put it in this past year as the field and I was able to pull out data over the last few months, the actual narrative that people have written. I also will take them by e-mail, Word documents whatever it takes I find it but the best narrative I can get are those written with cases closed. I even tried to edit them if I have the time before basically now for a couple of reasons. I mean it is just more efficient for me if I am trying to put all the narratives into PPR's. The other thing is when we have been called upon throughout the year at, do you have any stories about maybe employment or discharge of children, I have some ready, some current ones ready. The other thing about narratives from a practical standpoint is I am encouraging the attorneys and advocates to come up with narratives or choose cases to rank narratives that have a pretty broad impact. Kind of like what I explained. If you have an outreach event or training that then leads to individual advocacy or class-action. Anything you can track through

different intervention strategies I think makes the most powerful story possible and is something very unique to the PNA system.

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I like to try as much as possible to find narratives that really capture, like I said, the broad range of revenues we have. My first stop will always be self advocacy. I ask all of the programs for stories that they may have as it relates to self advocacy. I think that when we are able to show litigation stories, there is also something unique to peonies and of course it is required in all of the peonies to describe any litigation we might have. If we have class actions I try to find individual stories to demonstrate how the class action may have had a particular impact on an individual. There have been times when we have had barriers -- access barriers I highlight those again that is something that is unique to a PNA we had an access lawsuit that settled a couple of years ago, even now if I can weave that in how we've implemented a settlement agreement we are working on something with the state right now, a training for hospital staff and I am going to talk about that in this years PPR. So, always remember how the long-lasting effect that some of our work can still be relevant.

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I will give you all a minute to read this particular narrative because it falls within our group advocacy but it demonstrates a few things. I will give you a moment. This is about our work on the emergency preparedness coalition which actually became our response to hurricane Katrina and I want to demonstrate how we describe a collaborative effort. The next paragraph would describe the actual work that's we did as a coalition and the PNA effort in that collaboration. I want to show how we fill out all of that entities involved as well as demonstrate this is one of the areas we use for group advocacy. I think we are ready for the third poll. Talking about narratives.

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We want to ask you, while we are doing this, about whether your PNA trained staff to write good narratives? We are asking those of you who are on the web to answer us about whether you do training and if you do train other staff if you can share that training information with us? Or, if you do it and you are not able to write it down or if you don't do it. While we are going forward, please take a moment and let us know this. If you don't do it, one of the suggestions we have is for you to use a piece of this, of this webinar, the PowerPoint to do so and to use the examples in here and examples in the annual report. I want to talk a-determia-determi ner little bit about some of the concerns that get expressed around priorities and strategic goals. That -- I am sure this is something many of you have heard in terms of being concerns that priorities need to be -- need to have obtainable goals and create objectives that have a measurable target to them. And that those targets are linked to the PNA program. We are not spending a lot of time in this session talking about how to write good goals and measurable objectives but we are happy to talk to you about it if you would like some technical assistance. AIDD in particular we are Lisa did change this slide since they change their name, often is concerned about incomplete or



false financial appropriation for each priority article they use the term false, personally my comment has been why would you expect these numbers to be solid it is a question that is not really answerable from a financial perspective what I would say is with the new -- some of you may know we are piloting a new PPR for the PA DD program we've gotten rid of this financial questions so starting in FY 15 you won't see that question anymore I am happy to say. So, AIDD also wants to see information about underserved and minority populations, and one is concerned about the limited number of individuals with developmental disabilities and individuals from diverse ethnic and racial backgrounds on boards and advisory boards. Finally this is not just an AIDD issue, to make sure what you are report in your PC or in terms strategic goals and priorities are strategic goals and priorities you submitted at the beginning of the year and it is not that you contact the agency to let them know you need to change your goals and priorities. They are fine with that, more concerned about the fact if you have essentially dotted that i and t by letting them know. Many of the agencies talk about being concerned about things that are listed in the priorities which they view is more administrative than programmatic such as the goal of increasing diversity of the PNA staff.

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That is a very important goal, they don't do that as a programmatic priority for the agency and not appropriate to be listed as part of the agencies strategic goals and priorities in that work, not that it shouldn't be part of the strategic plan or some other kind of planning for the agency. They also don't love outreach goals and I can talk to people more about that if you would like to. One of the things that often happens in the agency is that the PPR's are not filled out completely. So, there are things that are left blank and even if you don't have any significant issues you should still indicate -- put a 0 there if you don't have it. I want to say something here for a minute about the grievance report. I know that many of the boards and advisory councils of the PNA are concerned about grievance. And about whether -- when you get a grievance and the perspective of both the federal project officer's is having a grievance is an indication that your process is working. They do not expect -- they know that PNA's cancer everyone and their communities and the fact that you have given people information about what you're grievance process is and that the process is easy enough or straightforward enough people are able to use it from the perspective of the Fed shows that you have a due process that is working. When you don't have a grievance that is worth the Ed flex go up to the Fed about whether or not you are in fact doing it. I also want to mention that every year in PPR's we see what appears to be a client name.

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So, whether or not it is in fact a client name it appears to us and are the feds that it is. When you have someone editing the document clearly make sure that this is either a pseudonym or the names have been scrubbed and you are writing them more generically. Crystal?

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Okay. Talking about collaboration, all of our funders want to be that. It is actually referenced in all of the PPR's in some form or fashion. I think a great place to start if you have been in collaboration with some of your partners throughout the years, maybe speaking at this time of year about what you are going to actually report out on because it is probably just a good idea to know what someone is reporting about you and vice versa. Like I said earlier, it is good to include that information in narratives where applicable if something came out of, like I said, a collaborative effort, make mention of that. In each of our PPR's, we are required to report out on sort of mandatory or required elaboration or at least reference specifically the DD network and the PADD PPR and the care PPR with a long-term care and they want to know about others. So, make sure as it gives you something to think about as you are going throughout your years, making a distinct efforts to collaborate with those partners because you have to speak to it later. The next slide refers to something I started doing a few years ago and it helped me throughout the years. That is, in my e-mail, because I collect all the information for the PPR, and I am going to talk about at the end of the year, I keep some folders in my e-mail so as soon as something immediate comes across or I hear about a staff member doing training, I just put it into the folder so I am ready at the end of the year. In the interest of time I am not going to go through all those, I think they are pretty self-explanatory.

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And then, there is something I would like to ask everyone, I would like to know what other people do to organize the information throughout the year on their PPR's. In the chat box or we will come back to it if we have time at the end of the session. So I am up on casework.

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Okay now we are moving to the constructing the casework examples in some ways, the heart of this presentation. So, I am going to give you some general tips about the casework, we will give you some examples, give you some questions and then we will give you some cases you can look at your self and see what you think works well and less well in some of these cases. So when developing casework it is important to connect the case examples to your priorities so when you put a case example underneath the priority it actually fits the priority. To provide a diverse set of examples to show the range of work in your agency that Crystal talked about before and to make sure you are not talking about the same case throughout your PPR even if it is really a terrific activity. If you focus on one case or only one type of activity, it gives the impression to the readers that is all you do when in fact we know that is not all any PNA is doing. Ensure the examples show target population of each program, this becomes a big compliance issue for those that have been reviewed by PAIMI in the last couple years you know this is a big sticking point with them as with all the agencies. They want to make sure any cases written up clearly relate to their programs. And think of basic writing tools in terms of topic sentences that defined issue, describe action taken and any follow-up. Assumes the reader is not familiar with your PNA, the agencies in your state or the facility. Most importantly in your state and write out acronyms and abbreviations. I think Russell showed you have she did a little asterisk when she explained an acronym previously and that certainly is fine, but in terms of us doing -- people will do that and then as we said using more generic terms in terms of consumers or clients and for those of you on the webinar, Gary

Taylor did raise a good point, thank you, that client names are okay to list its litigation has been filed that's not always clear in some of that cases so if you are using a client name in that way, it might be a good idea to given asterisk and let the Fed know it has a piece of legislation that's filed.

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I said it before in terms of using examples and try and stay neutral in the language of what you write. Here are essentially the four pieces we have found to be helpful to people in evaluating a case example. These are the questions that we are going to use throughout because I think it is pretty simple. You want to know what is the problem, what did the PNA do to solve the problem, what happens and what are the next steps. Here is an example of what we would view as a good case example. The PNA represented a client with a severe cognitive disabilities living in a group home. She was injured when group home staff left or in the shower with water running over her face more than an hour if there is a problem, two sentences. There is a link to the DD program and clearly laid out the problem. Due to her disability of the client was unable to move herself. They even said more clearly what the problem was. A PAIMI attorney -- a PADD attorney represented and the client [Indiscernible--low volume] they represent the client obtain a suit against the owner and that kind obtain a financial settlement is there any follow-up? Doesn't appear fine -- follow-up is necessary here is an interesting example, PNA was -- we took these from PPR's, just for you to know that -- and we hopefully scrub them so it is not obvious whose PPR it is. A pANI -- a PNA was contacted by a 28 -year-old who received SSDI and who was having trouble finding transportation to work. They contacted disability rights state names, that is what we are using asking for assistance with this and for help understanding how working impacted their SSDI benefits. Do we know what the problem is clearly? We have some sense of the problem, the PADD's advocated for VR to purchase reliable transportation to and from work for the client. We kind of know what the PNA worked on. The PA DD advocate also explained to the client benefits and how working affect the benefits, we know something else that PNA did but we don't know what happened. And that makes this example something that tells you -- answers some of your questions but not all the questions you should ask. Crystal?

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We are going to reflect on two cases -- one case example for the first and we will see if we have time but what we want to do is we want to go through a case example and actually go through the questions to see if it answered it. I will give you another example I will read this one disability rights statements provide assistance to 31 -year-old individuals with cerebral palsy after he was terminated from his government agency position. The individual requested accommodations shortly after being hired and during the 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. [Indiscernible] assisted this 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 paid to the employee. What we want to know is does the previous case example answer these questions? I think let's go through this. Please chime in on the chat box because we would love to hear your feedback. Does the previous case example

answer the following question, what is the problem? Yes. The person was terminated from the position. The second question is what does the PNA do to solve the problem? What we particularly liked about this case example was that the PNA assisted the individual to file a complaint and then represented the individual at an administrative law hearing. Then what is the outcome? The person was -- received backpay and the employer had to file a state -- pay a state fine, excuse me.

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So, we are going to have a poll which I may have answer a question for (multiple speakers)speakers).

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At the next one we will give them the case and put out the poll and let people answer.

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How about that, yes. If not that might be considered a leading question here. We will go to the next case example and I will not answer the question for you. 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 has not been any cases more exceptional than others. Cap cases generally encompass individuals require an individual information concerning the workings of the system in which they find themselves. Sport to advocate for specific needs and in time empowerment to move forward with their needs via informed choice and any individual -- sorry -- individual and systemic advocacy as needed. So the exercises going to be going to the question does the previous case example answer the following question what is the problem, what did the PNA do to solve the problem, what is the outcome and are there any additional steps? Now we will have a poll to see did case to answer the important question?

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I think you can go, Crystal.

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I think so. Thank you and is good to know we don't even know what the problem was for the individual, nor do we know what the PNA did. Basically set out systemic issues any state can save but didn't actually talk about what the CAP did. Now we will talk about data and PPR's.

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We know that case was a softball case. That clearly it didn't answer anything but we were just trying to give you a chance to use the questions and sort of have some experience of using them for your own. In terms of the data PPR's, I think we talked about some of this already. But, the feds do like to see you actually use data in your case narrative wherever you can especially when talking about group advocacy, talk about the numbers of individuals served perhaps the numbers of individuals who live in -- if you're working in a group home environment for instance. I think one of the major issues that affects the reporting of data and Crystal touched on this before is how your PNA -- house staff in your PNA collect data. Is everybody clear about what is the case? Is everybody clear about what is a short term and what is an INR? What would find is that a continual training and reinforcement of that through case review which we know happens very consistently in some places and less consistently as the work that's very busy in others. But the training on definitions is something to put in the back of your mind that really does impact not only the work of the agencies but also your ability to tell the story of your agency clearly and I know you might be using the calculator to actually check numbers adding down and across but that is something that consistently on a yearly basis we see problems. I think that Crystal has really touched on the other parts of the data so I don't think we need to go over this.

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We have talked about priority setting, we try to move do this a little so we know we've been talking at you for a while and we are interested to have you -- to hear from you in terms of what you think are good practices. In terms of priority setting feds to look at goals and priorities, they look at them to see how goals are documented and the effectiveness of the program. It shows who was served and who was not served. Crystal?

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Okay. I just want to go through some of the things I found helpful and I have learned this from other PNA's gathering training and outreach because many people throughout PNA's do this I find it helpful to gather the information as much as possible of folks are going out to do outreach. I am watching notices go out, those are some of the things that I put in my folder, websites announcing training, we have a management meeting each week and where we go through the happenings from last week. I keep the minutes from that meeting as sort of a way to tag particular events that I am going to write about later in the year. I am always interested in hearing what other PNA's do to capture that information anything basically beyond the individual advocacy. And lastly for me is how you might use the PPR data collection as an actual management tool. But what I do is I also use it for quality control, our managers use the information to make sure that cases are being maintained as I am running the work, is the advocacy the most potent we can do. Also it is a good way to find how things are going really wellwell. Sometimes things that are not necessarily a great outcome can really be captured in such a way to demonstrate the hard work we have done, it also sows trans, everything influx and let's say medication issues, if several people are working on it, might not be identified as a trend but when put together is something we notice that needs to be addressed. So Nachama?

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We want to talk about the book relations and also public policy and terms of how the PPR's can be used to support both of those activities within agency. And I think that whether or not in your agency people feel very positive about how closely the feds read your PPR's and how important the documents are, with the kinds of fights and discussions going on these days from a financial perspective, this is the only formal way we have to tell the story of the PNA. It is very important for us to do that. As we write up these cases and take the tremendous amount of time it takes for us to both pull together the cases and put together the numbers of what we do, as individual PNA's and as the network as a whole our story is really impressive. Many of you now have people working on PR and working on telling the story of your PNA's whether they be people who have been hired directly to do that or people who do that either through your legislative work or through other work you do, media work, that PPR's are a terrific place to find cases and examples of the work your agency has done over the year. It can be as Crystal said sort of highlights trends and gives statistics about the number of people you serve and gives a place for people to go and look from for the year. So, to the extent that those of you who have communication people on staff I think it is great to have them as a set of eyes on PPR's too. What we found is when communication staff are brought into that it really does affect the stories of how stories are written. So, just a few final thoughts before we open it up to get your input and ideas and thoughts about what works for you or doesn't work for you. Is that before you submit to PPR's, make sure the words accurately represent the work your agency does. We think a third reader who really has not been involved in the development of the individual PPR is essential. And have that person be reading the data -- -- with a couple of questions in mind does this reflect my work accurately? Is a compelling story? And if you are not clear about anything please feel free to contact me or Crystal, our contact information is -- Crystal is an honor -- we be happy to put you in touch with her. You can reach her through Georgia advocacy office. Operator, we are ready now if you can, to open the lines? We would like to hear from you about what things you think work well in your agency in terms of putting the PPR together, what works less well and things we raise in our comments and conversations that you would like to talk more about or if you have any questions?

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Thank you we will now begin the question-and-answer session. If you have a question please press star then one on your touchtone phone. If you wish to be removed from the queue press the pound sign or hash key. There may be a brief delay before the first question is announced. If you are using a speakerphone you may need to pick up the handset first before pressing the numbers. Once again if you have a question please press star then one on your touchtone phone. We have no questions in the queue at this time.

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Well, we do have somebody typing in to the text box. We know there are a lot of PNA's that spend time in terms of training staff and we do in courage of you who don't do that that use this PowerPoint and in particular really to use some of the workaround writing case narrative. That is the place that a lot of

members of your staff are involved. Sylvia Smith has a question about -- she is from Florida and she says they use a part of the report for their Board of Directors to help with PNA's and she asked the question about whether or not other people do that? If you can answer either through our text box or on the phone.

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I can speak quickly to that. Just that is something we do a report does it written for our board quarterly and I keep that, it is not exhaustive but I definitely keep that as another mechanism to tag information. Good point, thank you for bringing that up.

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Great point and we are hearing now both from DC and Indiana that they do that. And Texas also said that a quarterly litigation report is produced that is used for this. And I am reading for those of you who are not on the website, and Florida again has said that they have a separate ED report document and the separate legal report and she keeps all those handy in developing PPR's. A great idea. Illinois said they don't do that but that is a good idea, thanks to Florida thanks, Sylvia. This is a great time to share other things about what you do that helps your agency. We have gathered what we know but we also like -- should share from Florida, there are many ideas about what makes PPR season go better for some people than others.

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Once again star then one on your touchtone phone. Dave Zellner online please go ahead.

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Hi this is Dave Zellner from South Carolina we also have a quarterly report from each team that goes to our board and it includes summary of success closure stories that fall under each and every specific goal and outcome and we have a box that keeps track of how many we have had -- cases this year and new the quarter. It also covers outreach or special projects we may be collaborating in systemic type of goals. Those are there. My other caution would be is very specific things like deaf investigations come up under PAIMI and you need to keep track of those or you will never remember all of them. So some way to do specifics of the deaf or other investigations. That's all.

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Said day before you get off did Jesus set up your quarterly report to coincide with the PPR to capture some of this?

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I don't know. We have been doing it for a number of years, primarily for the board but it does allow us on a quarterly basis to know how many cases we have done compared to the promised number. And, would let us know if we were behind, far enough in a major project that we would go and get a priority change and notify federal funders of that particularly, PAIMI, we know is obviously very concerned about that.

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Thank you for raising that, day. Just to remind people if you did not hear that before, all of the federal project officers are open to people changing their priorities and objectives all the way up through September 30. So for FY 2013 it is obviously too late. So, if you did not meet priorities, that is not a terrible thing, just explain what you did and if you find yourself in the year really shifting and e-mail usually is sufficient unless a federal project officer's know there has been a change and why that change occurred. Other suggestions or thoughts? Questions for each other? Things you do in your state you think is helpful? Is PAIMI still during peer reviews of PPR's? They are not they have not done them into years for financial reasons they are -- it does not look to me like it is going to come back because and that is a financial issue which is very disappointing to particularly care and on strong the PAIMI program although that John Morrow the division director also would like to see them come back. And in many ways it makes much more sense for the project officers to focus on what the PPR say then to focus on with applications say. They do look at the PPR is pretty closely before they come out and do site reviews and PAIMI is really the only federal agency that is actively doing site reviews and they are doing between five and seven to nine a year those of you reviews of this year have been notified at this point there are a couple of states they notified as a question and that is all financial and of course as you imagine [Indiscernible--low volume]

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This is Dave again just a reminder obviously if you're thinking of changing your priorities, at all, presumably you will need to go to your Board of Directors because all priorities are set by your Board of Directors as far as I know and particularly in PAIMI, would have been in conjunction with the PAIMI advisory Council. So, it is not just something you can get to near the end of August and decide to send an e-mail to Karen, you probably would have to go back to your board and watch your quarterly meeting dates and that sort of thing so just to caution that it is fairly major if you are going to be changing your priorities, not just an e-mail off to Karen. That's all.

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Thanks, Dave that's an important clarification I am really focused on the communication with the federal project officers in this conversation that it is important to be reminded those things are documents that



require approval of the Board of Directors. There was a question that came in from Florida wondering about the PAIMI PPR's and a question are there no M TA are on the schedule is for those of you not familiar, those are AIDD's evaluative mechanism and AIDD has been reworking its MTAR process. I think we are in your? Maybe you're one it just feels like a two-year process. And they are essentially -- don't have funds to do Site Visit so what they are going to do is all of the MTAR reviews based on a desk review and I think you have seen that they are much more aggressively and thoroughly reviewing PPR's and getting back to people with a lot more questions than they have in the past. They are starting to use the checklist at AIDD to do this and it is part of them getting the MTAR process going and PPR is a central document that they use. We are on the topic of monitoring I will also say that RSA has also started again to pair and pad past reviews but every time they set one up they cancel it. They did do two client assistant program reviews and we will do one every year so in six or seven years maybe they will be to your agency, but they decided they didn't have the funds to do it that they do still come to the CAP program when reviewing be our agencies I think is important. As we are waiting for other questions or input I also want to direct your attention to the screen for those of you on the webinar and we are asking you to give feedback on how we did and how you found the webinar both in terms of the content, speakers and also the webinar. We are trying to have these webinars be more interactive so to the extent you give us any feedback or ideas, we greatly appreciate that. Are there any other questions people would like to raise?

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We have nobody in the queue at this time but once again star then one on your touchtone phone.

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Happy PPR season to everyone. I really am available if you have questions. I may be asking questions I think I asked Matt some of the same questions every year about calculating numbers and he is great about answering those questions. Because I would rather ask ahead of time or at least try to and get the calculations right and the information and the right spots. But I think -- I will provide any help that I can.

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Crystal put her e-mail address into the chat box for those that are on the webinar for those of you that are just on the phone, it is [indiscernible] we got a question Indiana what is average timeframe in which you all start preparing your PPR? That is a good question. Crystal do you want to answer that first?

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Sure. I assumed that you meant the actual we've been talking about year-long preparations but I usually line them up and I work on them because it is not my only role as I assume it is not any one single role. I look at the due date because [indiscernible] is due first as it happens I have most of the preparation done for that but by applying every applying a couple of times the last few months I'm hoping that

comes together quickly the rest of them I try to get we are in October I always try to get a couple out before Thanksgiving and I will be [indiscernible] the rest are going out before [Indiscernible--low volume] (multiple speakers).

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Either on the phone or on the chat box? When you all consider you start working on the PPR's your average timeframe? (multiple speakers).

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Sorry we have Dave Zellner back online.

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Thank you folks the can you just give me an idea, which ones, which forms do we already have access to? Since some of them are on their own special website summer send out and we have the government shutdown obviously we have PAB's I don't recall which ones we have already seen is there anybody who has a quick response as to our they all there right now? Are we still waiting for the newest versions or at least the FY 13 versions to come out from some funders?

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This is not I will grab this one. We do have electronic version that Karen Armstrong shot to us via the PPR again there is no changes to the PADD or the PADD payer cap there is a consistency across the board. There aren't any expected changes other than a slight change in the PPR regarding instructions. So I would operate on a mirroring of the templates you saw last year the exception is if you are on the PADD pilot program there might be different instructions but the actual PPR themselves are identical with the exception of a little clean up on the PAIMI PPR.

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Will they be reissued? Some of them you go to the website and then you check in and you see which forms are currently available and you see probably only new forms is everybody already up somewhere? Or send?

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The RSA MIS system currently has the page unavailable -- unavailable due to that budget cut down you cannot practice or submit and those three programs are the payer and a tea programs so you can't see

those that PAIMI PPR, the PADD PPR and the PAB's PPR a systems we maintain you can go into the system and again working with a draft of that particular report and prepare the report for submission or even submit if you are to that stage. As for [indiscernible] still in the stages of a submission fee a word document. They haven't -- never recommend template that has an change but they don't have it or be certified form. The PAVA aspect is not going to change from what ever your requirements for posture but it doesn't have the same electronic system as say the PADD PPR does. The last one was TBI and that has a twofold. There is the NDRN data collection form and that hasn't changed again that is a word document. The grant requirements haven't changed either but I don't know if their system is up or not because I don't have a login to that particular system to confirm if it is unavailable to the shutdown or not to maybe with a check to see if the grant application and reporting criteria for TBI have been posted but I am not certain on that exact one.

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That is fine thank you very much.

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There was a response in the text in the chat box for those of you who can see the chat box from Florida she would like to wait until December and submit at the last minute as she since October -- spent October and November working on the annual report. What I would remind people is it sort of depends on whether or not we have -- whether or not people are doing quarterly reports how quickly it all comes together at the end of the year and the PNA's the end up most stressed at the end of the year are those that leave it all to the last minute. It really is quite a big job to do this together and requires the input of many members of your staff in terms of writing and pulling numbers and pulling cases. And Florida is saying she only does the PADD PPR's and she does [indiscernible] report and troubleshoot the data and information during the annual [indiscernible] and also as you recall does the quarterly reports for the board which she pulls from heavenly. -- heavily so there's a lot of the work done so I think that is helpful and Illinois said we ask all staff to have their data in by October 15 so we can start running numbers. They start doing the non- statistical PPR work in November. I think that is probably accurate for many agencies. And Florida says she doesn't have to do the quarterly and she says thank God. [laughter] so, I mean the reporting documentation here is heavy if there are people on the phone who haven't been doing this for a while. It will be a much less stressful event and I think you are getting some ideas of how people kind of kickstart them.

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We have time for one more question, if there is?

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We don't have any in the audio queue.

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Okay. Well thank you very much for joining us today. And for taking the time to think about your PPR's. And, it really does tell our story. It is our most formal way to tell the impact of what we do at the PNA system and what the outcome is of all the work we do throughout the year. So, I just want to thank all of you on the phone for the work you do and the energy you put into developing the PPR for your agency and I want to thank Krystal for joining us. I always found her ideas to be very helpful and I sure you did to enter think Matt as well for helping me and for Trish, our operator. Please take a couple of minutes and go into the survey to give us your feedback and evaluation. Download the information, we will send out the link for the evaluation as well when we get off the phone. And, it was good to interact with you virtually and I look forward to communicating with you over the next couple of months and we are happy to help in any way we can. Thanks very much.

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Thank you ladies and gentlemen this concludes today's conference thank you for participating, you may now disconnect.

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