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ABSTRACT

This document presents the proceedings for the Office of Special Education Programs' 6th Annual Technical Assistance and Dissemination Meeting held on January 16-18, 1996, in Washington, DC. Conference discussions centered around changing expectations for local and state education agencies and technical assistance and dissemination (TA&D) activities as a result of the reauthorization of the Individuals with Disabilities Education Act (IDEA) and other changes in education policy; content areas of critical importance to TA&D projects and current activities in relation to information presented and shared; and future implications for TA&D systems and recommendations for new and/or additional collaborative activities. Recommendations from the conference focused on accessing and disseminating knowledge through technology, impact evaluation, and developing and marketing technical assistance and dissemination services and products. Specific recommendations included: (1) disseminate guidelines to the TA&D projects on accessible web page development; (2) develop a listserv for all TA&D projects; (3) plan for a technology training demonstration; (4) share information on the Government Performance Results Act (GPRA); (5) produce performance indicators consistent with GPRA that have the commitment of constituencies; (6) develop strategies for networking; (7) decide on sound marketing strategies; and (8) develop vignettes of technical assistance impact to demonstrate effectiveness. (CR)

Report of the Office of Special Education Programs

6th Annual Technical Assistance and Dissemination Conference

January 16 - January 18, 1996

Prepared by:

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Introduction

The U.S. Department of Education's Office of Special Education Programs (OSEP) convened the 6th Annual Technical Assistance and Dissemination Conference on January 16–18, 1996, at the Sheraton City Centre Hotel in Washington DC. Representatives from OSEP's technical assistance and dissemination projects attended the Conference. The Conference was organized by the Federal Resource Center for Special Education (FRC).

The purposes of the Conference were:

- *Provide a perspective on changing expectations for local and state education agencies and technical assistance and dissemination (TA&D) activities as a result of the reauthorization of the Individuals with Disabilities Education Act (IDEA) and other changes in education policy.*

- *Expand the knowledge base of participants in content areas of critical importance to TA&D projects; examine current activities in relation to information presented and shared; identify implications for future activities; prioritize ideas and resources.*

- *Extend discussions of future implications for TA&D systems; develop recommendations for new and/or additional collaborative activities; identify resources.*

The 6th Annual TA&D Conference was organized and documented by the Federal Resource Center for Special Education, a project managed by the Academy for Educational Development in Washington DC (contract #HS93033001).

The Academy for Educational Development, founded in 1961, is an independent, not-for-profit service organization committed to addressing human development needs in the United States and throughout the world. In partnership with its clients, the Academy seeks to meet today's social, economic, and environmental challenges through education and human resource development; to apply state-of-the-art education, training, research, technology, management, behavioral analysis, and social marketing techniques to solve problems; and to improve knowledge and skills throughout the world as the most effective means for stimulating growth, reducing poverty, and promoting democratic and humanitarian ideals.

AED

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Tuesday, January 16, 1996

***Purposes**: Provide a perspective on changing expectations for local and state education agencies and technical assistance and dissemination activities as a result of the reauthorization of IDEA and changes in education policy.*

8:30-8:40 **Welcome and Greetings** **New Hampshire Three**

Jim Hamilton
Division of Educational Services
U. S. Office of Special Education Programs

Carol Valdivieso
Director, Federal Resource Center for Special Education

8:40-9:45 **Perspectives on IDEA Reauthorization** **New Hampshire Three**

Moderator: ***Myrna Mandlawitz***
Governmental Relations
National Association of State Directors of Special Education

Robert Silverstein
Minority Staff Director, Subcommittee on Disability Policy
U.S. Senate

Robert Stodden
Kennedy Policy Fellow, Subcommittee on Disability Policy
U.S. Senate

Todd Jones
Professional Staff Member, Committee on Economic & Educational Opportunities, U.S. House of Representatives

9:45-10:45 **Changes in Education Policy** **New Hampshire Three**

Jack Jennings
Director, Center on National Education Policy

11:15-12:00 **Background and Update on 1995 TA&D Conference and Subsequent Collaborative Network Activities** **New Hampshire Three**

(1) **Defining Our Identity**

Richard Horne, National Transition Alliance for Youth with Disabilities

(2) **Accessing Knowledge Through Technology**
Judy Smith-Davis, Alliance 2000 Project
Dick Zeller, Western Regional Resource Center

(3) **Collaboratively Identifying Critical Issues and Multi-Regional and National Collaborative Activities**
Pat Trohanis, National Early Childhood Technical Assistance System (NEC*TAS)

(4) **Exchanging Strategies and Models: Review of Questionnaire Results**
Beverly Mattson, Federal Resource Center for Special Education

Overview of Conference and Topical Groups Assignments and Tasks
Beverly Mattson, Federal Resource Center for Special Education

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Moderator: ***Lou Danielson, Ed.D.***
Division of Innovation & Development,
U. S. Office of Special Education Programs

Thomas Hehir, Ed.D.
Director, U. S. Office of Special Education Programs

JoLeta Reynolds, Ed.D.
Special Assistant to the Director of the Office of Special Education Programs

Lucille Eber, Ed.D.
Director, Project WRAP
LaGrange Area Department of Special Education

Pamela Kaufmann, Ed.D.
Director, Northeast Regional Resource Center

6:00-8:00 **Reception and Exhibits** — **City Centre One**

Wednesday, January 17, 1996

Purposes: *Expand knowledge base of participants in content area of critical importance to TA&D projects; examine current activities in relation to information presented and shared; identify implications for future activities; prioritize ideas and resources.*

8:30-11:45 **Topical Discussion Groups**

(1) **Accessing and Disseminating Knowledge Through Technology** — **Dupont Room**

Facilitators: ***Dick Zeller***, Director, Western Regional Resource Center
Judy Smith-Davis, Alliance 2000, University of New Mexico

(2) **Impact Evaluation** — **New Hampshire Three**

Larry Irvin
Research Professor, College of Education, University of Oregon
Project Director, Oregon Research Institute, Eugene Oregon
Facilitator: ***Ken Olsen***, Director, Mid-South Regional Resource Center

(3) **Developing and Marketing Technical Assistance and Dissemination Services and Products** — **New Hampshire Two**

William Smith, Ed.D.
Executive Vice President, and Director for Social Development Programs
Academy for Educational Development

Facilitator: ***Richard Horne***
National Transition Alliance for Youth with Disabilities

12:00-2:00 **Keynote Speaker** — **City Centre One**

"Improving Technical Assistance and Dissemination Through Virtual Communities, Knowledge Webs, and Synthetic Environments"
Chris Dede, Ph.D.
Professor, George Mason University

2:10-3:45 **Concurrent Sessions**

(1) **The Role of Technical Assistance in Improving Results Through Systems Change** — **New Hampshire Three**

Lucille Eber
Project WRAP, LaGrange Area Department of Special Education

(2) **Optional Topical Discussion Meeting: Minority Issues** — **Dupont Room**

Judy Smith-Davis

Alliance 2000

(3) **Program Evaluation: Improving the Flow of Information to Congress** — **New Hampshire Two**

Gail MacColl
Assistant Director
Program Evaluation & Methodology Division,
U. S. Government Accounting Office

(4) **Introductory Session about the Internet** — **1255 23rd Street NW**

National Demonstration Laboratory for Interactive Information Technologies
Academy for Educational Development

4:00-5:30 Concurrent Sessions

(1) **Setting Up and Creating ListServs, Internet Servers, & World Wide Web Pages**

National Demonstration Laboratory for Interactive Technologies — **1255 23rd Street NW**
Academy for Educational Development

(2) **Standards for the Design of Exemplary and Promising Programs and Practices** — **New Hampshire Three**

Susan Klein
Office of Educational Research and Improvement
U. S. Department of Education

Thursday, January 18th

Purposes: *Extend discussions of future implications for TA&D Systems; develop recommendations for additional collaborative activities; identify resources.*

8:30-10:15 **Topical Discussion Groups Continued**

(1) **Accessing and Disseminating Knowledge Through Technology** — **Dupont Room**

(2) **Impact Evaluation** — **City Centre One**

(3) **Developing and Marketing Technical Assistance and Dissemination Services and Products** — **Monticello**

10:30-12:30 **Summary Session** — **New Hampshire Three**

- Reports from Topical Discussion Groups
- Prioritization of Recommendations
- Next Steps

Facilitator: ***Barbara Hanft,*** Consultant

Summary of Sessions

Perspectives on the Reauthorization of the Individuals with Disabilities Education Act (IDEA)

Moderator: Myrna Mandlawitz
National Association of State Directors of Special Education

Panelists: Todd Jones
Professional Staff Member, Economic & Educational Opportunities Committee,
U.S. House of Representatives

Robert Silverstein
Minority Staff Director, Subcommittee on Disability Policy
U.S. Senate

Robert Stodden
Kennedy Policy Fellow for Majority Staff
Subcommittee on Disability Policy
U.S. Senate

Ms. Mandlawitz introduced the distinguished panelists, stating, "We're going to get a good deal of information this morning on the issues surrounding the reauthorization of IDEA. I know many of you here are particularly interested in the reconfiguration fate of the IDEA technical assistance support programs. From a budget standpoint, these programs, I believe, are the most vulnerable. The House Appropriations Committee has zeroed out many of the line items from the reauthorization bill. Not only are these programs the most vulnerable, but I have found, in talking to members of Congress, that they are the least understood. Members of Congress have not made a good connection between these programs and how they support and enhance the implementation of the IDEA. While none of us are in a position to lobby Congress, we are in a position to educate people about the critical role of these programs. I hope that you and your networks will take the opportunity to let members of Congress know how the total programs of IDEA work, and especially how the Technical Assistance and Dissemination (TA&D) projects work."

After being introduced, each panelist briefly offered his perspective of the status of the reauthorization of IDEA.

Comments by Mr. Todd Jones, Professional Staff Member, Economic & Educational Opportunities Committee, U.S. House of Representatives

Mr. Jones, professional staff member, is working on reauthorization for the U.S. House of Representatives Committee on Economic & Educational Opportunities. To date, the Committee has circulated two discussion drafts of their vision of IDEA. Mr. Jones described the bill as

containing three major reforms:

1. The funding formula for IDEA will be changed from a child-count formula to a population- and poverty-based formula, that will change the focus from counting numbers of children and youth in programs to focusing on the needs of children and youth with disabilities, and creating incentives for identifying more children and youth who truly need the scarce resources that are available. Placement should not drive funding. There is no reason why children with learning disabilities should be taught in special classrooms, when the education could be accomplished in a general classroom for a lesser amount of funds.

2. There will be a shift in states set-aside funding from 25% to 10%.

3. Part D, discretionary programs, will have three sub-parts. The first sub-part is the Federal Programs. We created a series of authorities, at the discretion of the Secretary of Education, for delineating what the needs are nationally for special programs. This includes resource centers, long- and short-term studies, technology programs, and other technical assistance efforts. The Secretary will be able to constantly review programs and determine the need and appropriate funding they should receive. The second sub-part is the State Improvement Grant, which will have three-fourths of its funds expended on professional development activities at the local education agency level. The third sub-part is the Family Resource Centers, which will provide the traditional parent assistance network that we have today, in every state.

Mr. Jones also stated that discipline was a hotly discussed issue.

Mr. Jones was unclear about when the House bill would move forward, since that depends on a number of factors. The House intends IDEA reform to be part of a larger education reform bill.

Comments by Mr. Robert Stodden, Kennedy Policy Fellow for the Majority Staff Subcommittee on Disability Policy, U.S. Senate

Mr. Stodden, representing the U.S. Senate Subcommittee on Disability Policy, stated the Senate draft of IDEA reauthorization is a bipartisan effort. The Senate draft reflects two major themes: (1) Part B, including the IEP components and the newly structured discretionary programs, allow for a much greater interface between special education and general education, specifically the general education curriculum; and (2) there is a change in focus from the process of special education services to improved results for children and youth. The bill is meant to help states focus on improving transitional and educational results for children and youth.

One intent of the Senate bill is to capture and retain the functions of the existing

discretionary programs and structure those functions to very clearly show improved results for children and youth. Another intent is to create a defensible argument for these programs during budget discussions.

Part C is a systems change authorization allowing states to focus their resources on improving programs and results for children and youth with disabilities. To date, systems change efforts have addressed transition services and students with severe disabilities. This part has been designed to attain comprehensive systems change, i.e., to get at core systemic difficulties and attempt to solve them. Therefore, Part C can be seen as a linkage to Part B, creating ways for support programs to help states improve results for children and youth with disabilities.

Part D combines the personnel preparation with the innovation and research components of the current authorization. Part D is structured in three sections, with the purpose of linking closely the implementation of services in Part B and Part C's systemic change improvement. Part D is intended to create a flow from research to practice, and improve the use of professional knowledge and personnel preparation. The three sections of Part D are: (1) New knowledge production; (2) Integration of research and practice; and (3) Improved use of research and knowledge. The second section of Part D relates to personnel preparation. There were efforts to capture existing programs within the U.S. Office of Special Education Programs, Division of Personnel Preparation programs, and link them closely with the research section and with Parts C, B, and H. The personnel preparation authorities address: (1) High-incidence populations; (2) Leadership preparation; (3) Low-incidence populations; and (4) Projects of national significance.

The focus across the above areas is on: (1) Interaction with general education; (2) Involvement of general education in training; and (3) Linking improvement of outcomes for personnel with improvement in student results.

Part E addresses technical assistance, dissemination, and technology and media. One section includes a provision for Parent Training and Information centers (PTIs). The second section, technical assistance and dissemination (TA&D), captures existing programs in a format that is believed to be more logical than the present format. The third section addresses the current technology and media programs.

Comments by Mr. Robert Silverstein, Minority Staff Director, Subcommittee on Disability Policy, U.S. Senate

Mr. Silverstein, representing the U.S. Senate Subcommittee on Disability Policy, began with a critical statement:

> This law *helps* states and local school systems carry out their responsibility under the U.S. Constitution to provide a free and appropriate public education to children and youth. It is not an unfunded mandate. This law was passed in 1975 in recognition of

constitutional responsibilities of states and local school systems, and to provide assistance to help them meet their constitutional responsibilities.

Mr. Silverstein noted that, in Congress, there has been a change to strongly partisan politics, not only in terms of issues, budget, but in how business is conducted. Senator Frist's committee is working with the minority side and the administration to try and craft the best bill for children. The effort has been to link more closely the different parts of the law.

Mr. Silverstein focused on the Senate draft changes in Parts B and H of the bill. There is a redrafted section on findings, policy, and purpose, which tries to lay down the basic precepts of disability policy and link together the parts of the whole law. This is an attempt to show that this is a single law that has multiple components, to maximize the likelihood that children and youth will have better outcomes.

The Senate has chosen to make no changes in the funding formula for Part B.

There are some exciting and dramatic changes in the provisions for Individualized Education Programs (IEPs). We are trying to tie IEPs more closely to the general education curriculum and to districtwide assessments that are used for nondisabled children. The IEP provisions have been streamlined, and provisions that are not functional for parents and teachers, but were only paperwork exercises, have been eliminated. The intent is to make changes that are functional and not just burdensome.

There is a provision for mediation, requiring that parents be given an opportunity for mediation whenever a hearing is requested.

The triennial evaluation provisions have been changed so that new evaluations are not necessary every three years to determine if a child has a disability, only to determine the child's needs. A reevaluation of a child's disability may be requested at any time or during a natural transition point.

The Incidental Benefit Rule, from the Administration's bill, is included. This Rule states that when a child with a disability is in a general education class and receiving special education and related services according to an IEP, local education agencies may use Part B funds even if one or more nondisabled children benefit from the services.

We have reduced the data collection requirements, and changed the maintenance of effort provision to provide greater flexibility to school systems. We are making it clear, in the statute, that compliance interpretation of rules and regulations by the U.S. Office of Special Education Programs must be published in the Federal Register rather than through policy letters. Interpretations of regulations must be published at the same time.

Questions from the Audience and the Panelists' Responses

Question: How do the clearinghouses fit into the reauthorization bills?

Mr. Jones: Clearinghouses were not included as a line item in the current House draft of the bill. I can not forecast at this time the role of the clearinghouses under the new bill.

Mr. Stodden: In the Senate version, clearinghouse activities are in Part E, under national dissemination activities. There is a focus on dissemination throughout Part E. My sense is that dissemination functions are focused on eliminating barriers to system change and improving results for students. Most dissemination activities are included.

Mr. Silverstein: I'd like to follow up on something the Myrna said about personnel preparation. We have been working on Reauthorization for six to eight months. There is an absolute consensus about the need for personnel preparation. The training of teachers and other personnel is essential. The notion of the House Appropriations Committee zero-funding the personnel preparation program is without a doubt the outrage of the year. It makes absolutely no sense. We all have to do something to fix that.

Question: I'd appreciate some clarification about funding. I thought I heard a discrepancy between the recommendations from the Department of Education and the Senate bill, in the recommendation that we move toward a population-based, poverty-adjusted system, instead of the child-count system. I don't know where that is at all on the House side.

Mr. Jones: On the House side, our intention is to move to a population and poverty-based formula.

Mr. Silverstein: On the Senate side, we have not changed the formula at all.

Question: You said that the data collection requirements will be reduced significantly. Could you elaborate on that?

Mr. Stodden: We are concerned about the IEP process, and the amount of effort that local education agencies (LEAs) put into writing IEPs. The major change is the reduction in paperwork. There has been a movement away from short-term objectives toward annual, measurable objectives to reduce the amount of paperwork that teachers must do to develop IEPs.

Mr. Silverstein: In terms of overall evaluation requirements, states would also have to respond to information requests from the federal government.

Mr. Stodden: There is also a dramatic decrease in what is expected in data collection. There will be a longitudinal study, for example, from which we will have good

information. There will be a lot more sampling.

Mr. Silverstein: There was an attempt in two other areas to cut down on the amount of work done in data collection. One is the evaluation of students for eligibility. If a student has an obvious disability, there is an effort to remove the requirement of completing a full evaluation every three years. Another area involves states reporting to the federal government. Once a state has a plan on file, the state will be allowed to update the plan instead of having to create an entirely new one.

Mr. Jones: That's a part of the House bill too. In the House bill, state education agencies (SEAs) and LEAs will not have to resubmit plans unless there have been significant changes. We are trying to focus on function and outcome rather than process.

Question: Given the shift from the focus on process to the focus on outcomes, what will be the role of the U.S. Office of Special Education Programs around states and monitoring? How do you see the linkage in terms of compliance versus achieving evidence to support desired outcomes?

Mr. Jones: In our vision, the U.S. Office of Special Education Programs will continue as the federal implementing body of the program, reviewing the actions of individual states, reviewing the data collection requirements that remain, and increasing, in fact, in-house technical assistance to SEAs and LEAs from current levels, based on how we view we've changed the focus within the discretionary grant program as well. We have some new activities for OSEP to engage in, including the innovative service delivery system, which will permit up to ten LEAs to alter existing law and regulations, if they have demonstrated success in providing special education services, if they have the cooperation and approval of their local parents and families, and if their plan is approved by OSEP.

Mr. Stodden: In the Senate bill, there is some specific guidance to the U.S. Department of Education for monitoring. We are refocusing toward results. My sense is that compliance monitoring will shift from counting or seeing whether IEPs are completed to the effects of the IEP process on improved results for children and youth. The mechanism to support that shift are Parts C and E, which support states in making that shift.

Question: Could you clarify the role of the technical assistance and dissemination projects? It appears that in the Senate bill, these projects will remain functioning much as they are now. But the House bill is vague about what could happen to these projects.

Mr. Jones: I would not describe it as vague; I would describe it as flexible. The U.S. Secretary of Education is going to have the flexibility to alter the system as appropriate. One of the difficulties we see is Congress becoming too dictatorial in how these programs are handled under the broad themes that are enunciated in the law. In our view, if the

Secretary is given that level of flexibility, the program can be effectively carried out within the limits we've placed on the program.

Question: Since there has been discussion on the Hill about eliminating the U.S. Department of Education, how do you see all of this playing out if that were to come to pass?

Mr. Jones: There is talk of eliminating the Department. That discussion has to be carried out separately from this. These programmatic issues have to be handled within the context of an IDEA discussion. Outside of that, when the time comes for this discussion, there are a number of members who have very strongly and publicly stated that they would like to see the Department eliminated. The reason I can not comment more specifically is that there are a variety of ways the people have talked about changing the role, reducing the role, or eliminating the role of the Department of Education. Under some of these, there are combinations of programs from Health and Human Services (HHS), from the Department of Labor, some studies with the National Institutes of Health. To go into more detail would be just too speculative on my part as to what the function of these programs might be in those kinds of scenarios.

Question: There is a huge, in my opinion, philosophical difference between the versions of the bill. The Senate bill seems to recognize a supportive role for the states. The House bill seems to focus on LEAs. The Senate bill includes provisions for personnel preparation; the House bill does not. Would you talk about these differences and how you see them getting resolved?

Mr. Jones: I would have to disagree with some of the premises that have been stated. I do not believe the House bill is wholly focused on localities. Though I have to admit that with the number of school board members on our committee, there is a great faith in the abilities of LEAs to carry out their responsibilities as education agencies. To that end you might be talking about the shift in funding control: the ninety/ten split as opposed to the seventy-five/twenty-five split in state/local funding. That's actually more of a placeholder than a hard-and-fast figure. We are trying to find and focus on what are the appropriate federally funded roles of state education agencies, as opposed to continuing the stated levels that we have today.

I would also disagree on the personnel preparation issue. That is an issue that has yet to be resolved. We have no appropriations line in Subpart 2 of Part D, which is the personnel preparation section.

Question: In the House and the Administration's bills, there is a state improvement plan; whereas in the Senate bill they speak of a local improvement plan. Could you talk more about why this difference exists?

Mr. Silverstein: There is a state systems change provision that is similar although somewhat different than the administration's provision. But the concept of state systems

change is the whole essence of Part C of the Senate bill, and we added a complement at the local school level for that statewide systems change initiative. So I guess I disagree with your assessment of the Senate bill.

Question: Could you say a few things about how you imagine the implementation of the Secretary's discretionary powers?

Mr. Jones: We intend to discuss with the U.S. Department of Education how discretionary powers are to be implemented. Frankly we perceive the Secretary's ability to execute programs to be greatly enhanced by the elimination of some of the fairly detailed prescription and oversight which are obligated on the Secretary. The Secretary will be able to reallocate (some) resources to address the needs that the Secretary views as most important. When you do not have fifty new state plans coming in, you are not going to have to dedicate the same number of personnel to review them. Again, that is still to be resolved.

Question: I want to ask about the decisionmaking process that was used when people decided to divide up the discretionary programs according to function, as opposed to some other variable such as age. A number of people have expressed concern about: How are you going to get an appropriation for systems change when you are going to have to spend a lot of time explaining to the appropriators what you mean by that? Given that both House and Senate have gone down that road, what do the House and the Senate think of protecting the discretionary programs by indexing them to the total IDEA appropriation: such as ten percent of the total IDEA appropriation would be up to the Secretary's discretion to withhold for national projects?

Mr. Stodden: I think there has been an effort to capture some sort of a balance between structuring the programs by function versus structuring them by disability, category, type, or level. The way that has happened is, Parts C, D, and E in the Senate draft are functionally based. The primary reason for that is, it was felt that it would be much easier to explain a set of functions, like technical assistance, dissemination, personnel preparation, and research innovation, in relation to supporting Part C and functions in Part B and H, rather than staying with the old severe emotional disturbance (SED) and early intervention categories that now guide discretionary programs. The balance that we attempted to create was—in the application processes for grants described in Part B—we put in a requirement that the application process would have to account for age levels, disability types, and disability levels. The applications that are submitted would have to account for that range.

Changes in Education Policy

Mr. Jack Jennings
Director, Center on National Education Policy
Washington, DC

Mr. Jack Jennings began by saying, "You've been discussing changes in the Individuals with Disabilities Education Act's categorical technical assistance and dissemination programs. I've been asked to have a broader discussion with you, about federal aid in general and the consequences for special education programs of pending legislative changes. But I would like to talk even more broadly, about what's happening in public education in this country, especially elementary and secondary education."

Public Support for American Education

Jennings explained that he had spent the previous year traveling around the country attending meetings of educators and giving presentations. What he discovered is related to the results of a report prepared by the Public Agenda Foundation in 1995 called *Assignment Incomplete,* which found that American support for the public schools is 'fragile and porous'. The report stated that most Americans who have children and youth in public schools would transfer them to private schools if they could. Americans feel that private schools do a much better job. Americans are quite skeptical about public education, and they're not ready to say they want it to continue. "After a year of traveling," said Jennings, "I believe that is true. I think there's a very skeptical attitude toward public education in the country." Jennings said he tried to figure out why Americans are so skeptical about public schools. His thinking came down to these four reasons:

1. "The media is not publishing anything of import that is positive about public schools. Everything that's being published is negative."

2. "Teachers and educators are turning inward. Teachers and administrators are turning inward because they're getting constant criticism from outside education, and they're giving up dealing with it."

3. "The success of far right organizations in pounding away at education. Far right organizations are having an effect in almost every area of the country. The far right is pounding and pounding and it's starting to have an effect. The far right is accusing public schools of all kinds of things, even mind control."

4. "We say we want the schools to do better, we say we want higher standards, but I don't see educators and parents really putting the effort into doing that. In the average public school today, only 40 percent of classtime is spent on basic academics, while 60 percent

of the time is spent on electives. Parents do not insist that their kids study, that their children and youth turn off the television and do homework, that their kids not have after-school jobs for extra change, that they devote themselves to school. We are not getting achievement out of the schools because we're not putting the effort into it."

Perspective on the Congressional Legislative Agenda

Jennings addressed the legislative agenda of the Congress. "The equilibrium in the Congress has shifted from being moderately liberal to being very conservative. What that means is, the criticisms of the far right organizations are having a disproportionate effect in the Congress. And, these other factors, including negativism and educators turning inward, mean that the far right agenda is enjoying more acceptance than it otherwise would.

"So today, you have the House of Representatives voting deeper cuts in education than in foreign aid. Foreign aid is considered very unpopular, but education is cut deeper. The average discretionary program, to balance the budget, is cut by four percent. In the House, education is cut by about sixteen percent. The cuts that are coming about are not coming about to balance the budget, but for ideological purposes, to eliminate the public schools.

"This is the agenda being enacted by one strong part of the Congress. That's the same group that has shut down the federal government twice. They have enough power with those seventy or one hundred votes in the house to change the whole equation. So you're sitting here with your nice little set of programs, but you are right in the middle of this storm that is going to rain on you. You are in a big, big debate: Should we have public schools in this country? What should they be like? What should they be accountable for?"

Recommendations for Increasing Positive Perceptions of Education

Jennings offered some ideas to the audience about steps they could take to balance the public's and Congress' perception of public schools and special education.

1. "There has to be a balanced presentation of schools in the media."

2. "Public school educators and administrators must re-engage people and speak up as citizens. This is a democracy. If one small group has organized itself well and is having a disproportionate influence, all that shows is that the democracy works. Any other group can get organized and also have an influence."

3. "If the far right says something and it's not true, it has to be rebutted. If it is true, you should pay attention to it."

4. "If we really want higher achievement in this country, we had better do something about it. We had better turn off the TVs, we had better tell the kids not to get jobs after school,

schools had better get reorganized so that they concentrate on improvement. Effort equals results."

IDEA Reauthorization and Appropriations

Jennings then talked directly about the effects of the IDEA reauthorization on special education technical assistance and dissemination projects. He identified changes in the reauthorization that will directly affect TA&D projects:

1. "One problem is money. Children and youth with disabilities are spread throughout the population, and this is good. However, the federal government will be sending less money to states, and within states there will be fierce competition for scarce resources."

2. "Another problem is the issue of blending in programs for disabled kids (such as Medicaid) with general education programs. IDEA is the last discrete program, and it may well be blended with other programs in a comprehensive education reform bill. The problem will be making sure that kids with disabilities receive the services they need in programs intended for a general population."

Recommended Steps for Action

Jennings ended by exhorting the people in the audience to take action. "Get re-engaged," he said. "Do not let things be said that are not true. Talk to people. If we lose public education because people have turned inward, we have lost a great treasure. Public education has made this democracy what it is by bringing us together. Public education has to change, quite a bit, but that does not mean it should be thrown out. Let's figure out positive ways to make it better. This involves you, and me—all of us."

Discussion Panel from OSEP: The Role of Technical Assistance and Dissemination in Improving Results Through Systems Change and State Improvement Plans

Moderator: Lou Danielson, Ed. D.
Division of Innovation & Development, U. S. Office of Special Education Programs

Panelists: Thomas Hehir, Ed. D.
Director, U. S. Office of Special Education Programs

JoLeta Reynolds, Ed. D.
Special Assistant to the Director of OSEP

Lucille Eber, Ed.D.
Director, Project WRAP
LaGrange Area Department of Special Education

Pamela Kaufmann, Ed. D.
Director, Northeast Regional Resource Center

Summary of Comments by Dr. Tom Hehir

Dr. Tom Hehir, Director of the U.S. Department of Education's Office of Special Education Programs (OSEP), began by saying he wanted to discuss the significant changes that are likely to occur with the reauthorization of the Individuals with Disabilities Education Act (IDEA). He noted the importance of Technical Assistance and Dissemination (TA&D) providers in implementing IDEA.

Accomplishments under IDEA

Over the past twenty years, major accomplishments have been made in improving the status of people with disabilities. Because of the IDEA, over one million children who were out of school had an opportunity to receive services. The employment results for persons with disabilities have improved dramatically. Institutionalization has decreased; there are about 80% fewer young people in institutions today than there were when P.L. 94-142 was passed. So far, the field has documented only one generation of young people who have benefitted from IDEA. Even so, data to date support the premise that IDEA is one of the most successful federal programs. Much of that success comes from the IDEA support programs, including the TA&D Projects.

Since funding for IDEA is uncertain, OSEP is concerned about keeping intact the strong support program of TA&D providers.

Changes in Proposed IDEA Reauthorization

A change in the IDEA will likely occur in Part B. This change will require states to establish performance goals and standards in order to improve results for students with disabilities.

Under the reauthorization, IEPs will focus more on what students with disabilities should learn in schools. IEPs should focus on children and youth with disabilities having access to the general education curriculum. Currently, IEPs are not always connected to the curriculum, but instead are primarily focused on a student's disability.

State Improvement Plans

Currently both houses of Congress are considering various recommendations regarding the reauthorization of IDEA. The Administration's bill has introduced a state improvement plan (SIP) that is the focus for discretionary programs. (The SIP draft has been included in each of the draft proposals we have received.) The Administration's proposal reflects a movement toward a results orientation that the House and Senate have adopted in their draft proposals. The primary function of the SIP is to use OSEP resources to help states improve results for students with disabilities.

Major Roles for the Technical Assistance and Dissemination System

States are reaching a relatively high degree of compliance with the IDEA. The existing technical assistance system, however, can support states to a greater extent.

While the basic structure of IDEA is in place, states and special education providers need to emphasize a results orientation as well. TA providers need to work with states to improve results for students with disabilities.

States will need assistance in establishing baselines from which to start the SIP. The technical assistance system should help states accomplish that. The existing technical assistance system can support states to a greater extent.

Currently, TA providers have a lot of successful experience with systems change. Dr. Hehir stated that he was hopeful that technical assistance providers will continue to bring to states that knowledge of systems change.

One critical part of OSEP's vision is the Regional Resource and Federal Centers (RRFC) System which is well-developed and competent. OSEP foresees a significant part for the RRFC

system in the SIP.

OSEP's TA&D providers need to consider the following: What has worked with young people? What has helped bring states to greater levels of compliance? How can we improve our ongoing evaluation of programs, practices, and compliance? These are the major concerns for the TA&D system.

OSEP also wants to increase the capacity for specialized technical assistance that strongly connects research and practice. Currently, early childhood programs have very strong links between research, technical assistance, and implementation. Programs that specialize in severe emotional disturbance, personnel preparation, evaluation, violence prevention, and transition will be very important in this role.

Dr. Hehir concluded that TA&D providers have the capacity within our field to move aggressively to improve results for students with disabilities. TA&D providers are very much a part of that.

Comparison of the State Improvement Plans within the IDEA Reauthorization Bills from the Administration, the House, and the Senate

Dr. JoLeta Reynolds
Special Assistant to the Director of OSEP

Dr. Reynolds, Special Assistant to the Director of OSEP, summarized and compared the State Improvement Plans in the IDEA reauthorization bills from the Administration, the House, and the Senate.

Dr. Reynolds disseminated a draft of a summary chart of the state improvement plans in the proposed reauthorization of IDEA. This chart compared the provisions for the state improvement plan (SIP) in the Second House Draft of IDEA Reauthorization (from August 11, 1995); the Senate Discussion Draft of IDEA Reauthorization (from November 20, 1995); and the U.S. Department of Education Administration's Bill for IDEA Reauthorization (H.R. 1986).

Dr. Reynolds emphasized the importance of the TA&D Projects to the development and implementation of the State Improvement Plan. "As a former state director, I know how much the TA&D Projects will be key to the implementation of the state improvement plan, regardless of what version of IDEA may come out of Congress."

Dr. Reynolds divided into twelve parts her discussion of the provisions for the state improvement plan:

1. The location of the state improvement plan in each version of the reauthorization bill
2. Congressional findings regarding the SIP
3. Congressional purposes for the SIP
4. Eligible recipients of funds under the SIP
5. The process by which states will apply for grants under the SIP
6. The content of the SIP section of each version
7. Procedures by which states will report to the U.S. Department of Education
8. The process by which states will be approved to receive funds under the SIP
9. The duration of grants that are awarded under the SIP
10. The particulars of funding that states will receive under the SIP, including funding amounts, and target populations
11. Mandatory use of funds for professional development
12. Miscellaneous details pertaining to the SIP content of the three versions of IDEA reauthorization

Overview of the Integrated Technical Assistance Evaluation and Systems Change Process in Illinois

Dr. Lucille Eber, Ed. D.
Director, Project WRAP
LaGrange Area Department of Special Education

This is an overview of an integrated technical assistance evaluation and systems change process that we have adopted in Illinois. I have changed my perspective of my role as a technical assistance coordinator to thinking of technical assistance as including everything you do *with* the stakeholders rather than for the stakeholder. I believe that is the only way you will get to systems change. We look at technical assistance as an umbrella that includes evaluation, training, facilitation, and other areas. We have learned there is not only a process to technical assistance, but also content. Many technical assistance providers start heavy on the process, and then have to move into the content. In the emotional and behavioral disabilities (EBD) field, we've been focusing more on the content and then moving into the process.

One valuable avenue for delivering technical assistance to states is to build technical assistance around state initiatives. Another avenue is through a crisis. For example, the "Room and Board" crisis in Illinois generated initiatives upon which our statewide technical assistance network is based. We have to keep changing the nature of our technical assistance as events change. Another critical event that affected our technical assistance network was the reorganization of our state level special education department. The reorganization resulted in an integration of service delivery, technical assistance, and evaluation. What that means for technical assistance providers is building the capacity of local providers to conduct technical assistance and evaluation as part of their service delivery. It involves a lot of community and interagency partners and family partners. Therefore our technical assistance expands beyond the classroom and the school.

When Illinois began its initiatives, Dr. Tom Hehir, Director of the Office of Special Education Programs (OSEP), was involved. We started with a series of three-year Phase 1 EBD projects, which included technical assistance and evaluation. I came on board at the beginning of Phase 2 projects. In addition, we were in the middle of an OSEP-funded Serious Emotional Disturbance (SED) project. At that time we moved from project to statewide technical assistance and evaluation addressing systems change. We began a dialogue focus group and started planning integration activities. A critical question was, what are we going to do when the Phase 1 projects end? How will our school districts look different? That was when we changed our technical assistance approach. We started evaluating the projects' child and family outcomes and systems change. We focused on internal systems review of barriers to better outcomes. We started state level interagency activities.

At the end of the Phase 1 projects, the Illinois State Department of Education decided to

award grants to technical assistance providers. My job was to link all of these people with their agency partners at the state, regional, and local levels.

Our technical assistance network moved off in several directions at that time. Through Illinois' mental health reform plan, we used our leadership to support state partners in mental health and child welfare. We shared what we had learned from the Phase 1 Projects. We developed state-level partnerships in the form of an interagency management team and regional level partnerships among educators, mental health providers, child welfare, and technical assistance providers. Education virtually provided the leadership for interagency systems change in Illinois at that point in time.

We find that there is a strong need for interagency partnerships to address the needs of students with EBD. Therefore, a key link was strengthening our approach and broadening our impact across the state. Four Illinois state agencies conducted major wraparound training at the local level across the state. In addition, the Phase 1 EBD Projects had outcomes that could be tied to general practices. As a result, we conducted activities at state, regional, and local levels, to leverage impact and systems change.

We placed a critical emphasis in our activities on building local capacity for technical assistance to professionals who were already interacting with children with EBD, their families and the community. We revamped the wraparound training to train school-based wrap around leaders and facilitators.

We emphasized that an Individualized Education Program (IEP) meeting is an opportunity to create a multiple life domain wraparound plan that is tied to good outcomes and the broader community.

We train people who want intervention or support teams in schools. These teams will train people within their own districts in using this new process. We tailored the training to school-level professionals without losing the sense of interagency partnerships. This is a delicate balance that we are continuing to address at all times.

We have examined what has happened over this six year period in Illinois. We are making decisions based on the data we have. We are helping local school districts restructure their service delivery methods based on the finding and experiences of our projects. Thus, the evaluation has become critical.

We moved from technical assistance meetings with only involved professionals to statewide and regional technical assistance meetings for everyone. We shared key information about what is going on at the interagency level, the infrastructure level, and the funding level.

We decided to take advantage of people's interest and improve and expand our evaluation process. We want to help schools districts integrate evaluation strategies into their program

development. We design evaluations with and of school districts who want to evaluate and improve services for students with EBD. We have a framework of strategies from which to choose. We allow the pilot schools to pick and choose from these strategies and determine their extent of participation. Part of our data collection, is an instrument to analyze the system. We find the key for effective evaluation and technical assistance is not only stakeholder input, but constant feedback. We set up a schedule. Within three months, we develop a baseline profile of the system. Pilot sites can use this profile in program development and redesign based on the wraparound approach.

Regarding technical assistance processes, we emphasize collaboration, direct training, consultation, concentration, information dissemination and solutions support, which is onsite technical assistance for local providers around either individual cases or system cases. In addition, we facilitate meetings and assist in product development, self improvement, and evaluation. We are helping people develop self-evaluation strategies, which become the content of the change process.

At a recent state-wide technical assistance meeting, we reviewed our goals. A major goal is to improve outcomes for students at risk of being identified as EBD and their families. Under that goal, we are increasing school-based technical assistance and training opportunities. We are continuing local networking and supporting schools. We want to improve educational leadership with participation at the local level. We also want to support local, regional, and state funding coordination to operationalize redirected resources around children and families at the community level. Another major change in the system has been the pooling of funds in different ways at the state, regional, and local levels.

We have to help local teams operationalize what practices are good. We keep asking: What is happening in the regions now? What has happened over the past six months? Where do we need to focus support? Who is interested in our evaluation data? Who is using it? Who needs to present it in different ways? Who needs different evaluation data? How do we continue expanding our regional and state network to support local capacity building?

We are moving toward technical assistance (TA) hubs in the state of Illinois, TA hubs such as Regional Resource Centers. We are trying to operationalize different uses of resources in the regions for schools and communities to support children. There is a big gap between the numbers and needs of children and the resources that are allocated through agencies as a whole. Our evaluation of technical assistance is based on changing events and initiatives. We have a timeline and delineation of Network Activities.

The State Improvement Plans

Dr. Pamela Kaufmann
Director, Northeast Regional Resource Center

The current Individuals with Disabilities Education Act (IDEA) state plan is different from the proposed state improvement plan (SIP). Even after IDEA reauthorization occurs, states will need to submit a State Plan if they want to receive federal funds under the SIP. A real concern regarding the SIP is that State Directors of Special Education will be burdened with extra paperwork. Another concern is that State Directors should have the final say in how states' priorities are set. A third concern: How should one define accountability in the SIP? How does one judge progress under IDEA?

It is rare that a State Director has actively participated in a particular state's initiatives in education reform. It is rare that a State Director has a say in the IEP process or the statewide assessment process. It is rare that a State Director can influence statewide standards that are set forth. The State Improvement Plans (SIPs) can be a valuable tool for inserting special education into general education reform. The SIPs could be used profitably to address systemic noncompliance, as identified by the Office of Special Education Programs (OSEP). This is a positive element of the reauthorization drafts currently under consideration.

What does reauthorization mean for the Regional Resource Center (RRC) directors? Clearly we have an opportunity to really forge partnerships. This is an opportunity to come together with states to develop SIPs. Intrinsic to the RRC system is the process of developing, with state departments, state and local needs assessments, pulling together collaborators, defining and developing priorities, and analyzing data and performance results. RRCs have linkages with many other resources. Many agencies and projects have downsized recently, and they do not have the capacity or staff time to really forge linkages with technical assistance (TA) providers, particularly with the research community. Helping (more) to forge those linkages could be an increased role for the RRCs.

The Technical Assistance and Dissemination (TA&D) Network could support states as they progress with planning and implementation of the SIPs. Are the SIPs making a difference? Have strategies been implemented?

One of the states in NERRC's region has instituted a system whereby every district is required to develop an Improvement Plan. NERRC has been asked to work with two districts in developing and field testing these plans, to ensure that the voices of children with disabilities are heard, and those of families, supporters, and teachers. Activities such as these are valuable because they bring our thinking down to a local level, and expand our thinking to systems change.

Impact Evaluation

Larry Irvin, Ph.D.
Research Professor, College of Education, University of Oregon
Project Director, Oregon Research Institute, Eugene OR

Facilitator: Dr. Ken Olsen, Director, Mid-South Regional Resource Center

Dr. Irvin focused his discussion on methods whereby technical assistance and dissemination (TA&D) projects, particularly Regional Resource Centers, could use impact evaluation to their benefit. He referenced a 1992 Position Paper on the Evaluation of Outcomes and the Assessment of the Impact of Services, and referred to a framework of a particular impact assessment model conducted by the RRCs: "Framework for an Impact Assessment System: RRC Program."

Definitions of Outcome and Impact

An outcome is defined as: Those things that happen immediately after a technical assistance activity.

An impact is defined in two Levels: Level One Impact and Level Two Impact. Level One Impact is defined as changes in the state level system—the SEA system and its work with LEAs. Level Two Impact is defined as the link between the systems change, and improvement in educational programs. That is, Level Two Impact is the value that is added to programs and to the lives of end-customers.

Before an evaluator begins an evaluation of a program, he or she should determine:

1. Beneficiaries of the program
   - Who are the clients whom the program is intended to serve?

2. Integrity of the program
   - To what extent is the program proceeding according to plan?
   - What should be changed about the program?

3. "Evaluability"of the program
   - Is a program at a point at which an impact evaluation would be useful?
   - Are the program objectives are well defined?
   - Are program activities are making progress toward those objectives?
   - Do the program's personnel know how they will make use of the evaluation information?
   - Can the evaluator explain which parts of a program are relevant to the current

evaluation, and which are not?

More details about determining a program's evaluability can be found in The Evaluator's Workbook, Ratzlaff, L. (Ed.), Capitol Publishers, 1986.

Use of a Logic Model

Dr. Irvin discussed developing a logic model that illustrates a program's "theory," or the logic behind its implementation. It is based on information provided by an evaluability assessment. A logic model will illustrate a program's (1) goals and objectives; (2) resources and other inputs; (3) activities; (4) outcomes: immediate, intermediate, long-term; (5) linkages between goals/objectives, resources, activities, and outcomes.

Objects of an Evaluation

In an evaluation, there are four Objects of Evaluation:

1. Context evaluation, which provides guidance in choosing program objectives and assigning priorities. Aspects of context evaluation include:
   - institutional context
   - needs of the target population
   - effective methods of meeting those needs
   - problems that underlie the needs
   - a determination of whether the program's proposed objectives can respond sufficiently to the needs

2. Input Evaluation, which provides guidance in implementing and refining a program. Aspects of input evaluation include:
   - system capabilities
   - possible program strategies and procedural designs to implement the strategies
   - program budget
   - program time constraints

3. Process Evaluation, which provides guidance in implementing and refining a program. Aspects of process evaluation include:
   - how well the program is working
   - defects in the procedural design
   - how well specific parts of the program work for individual people and/or groups
   - whether the program is proceeding according to plan

4. Product Evaluation, which provides guidance for termination, continuation, or modification of the program. Aspects of product evaluation include:
   - program outcomes

- stakeholders' judgments of outcomes
- relation of outcomes to objectives
- relation of outcomes to context, input, and process information
- worth and merit of the outcomes

More information about the four Objects of Evaluation can be found in Madaus, G., Scriven, M., Stufflebeam, D. (1983). *Evaluation models: Viewpoints on educational and human services evaluation.* Boston: Kluwer-Nijhoff Publishing.

Government Performance and Results Act

Dr. Irvin provided a handout on the Implementation of the Government Performance and Results Act (GPRA). The Act shifts the focus from program inputs to program execution—what results (outcomes and outputs) are being achieved, and how well are programs meeting intended objectives? GPRA sets out requirements for defining longterm general goals, setting specific annual performance goals (targets) that are derived from the general goals, and annual reporting of actual performance compared to the targets. Finally, GPRA provides for tests of various performance budgeting concepts. These tests will look at choices between resource amounts and various performance levels, optimizing performance for the resources ultimately allocated for the program(s). Full-scale, government-wide implementation of strategic planning, annual program goal-setting, and annual program performance reporting of expenditures in the Federal budget begins in 1997. Implementation will be characterized by:

- Defining an agency's mission, and setting general goals and objectives are inherently budget and policy issues, and involving a broad group of agency, Congressional and public stakeholders in this process.
- Intrinsically linking the annual performance plan to the President's budget, and having performance goals correspond to program resources requested.
- Asking agencies to take a leadership and coordinating role during the pilot phase, and the preparations for full-scale implementation.
- Giving agencies substantial discretion in defining annual goals and measures.
- Limiting prescriptive directives or guidance (e.g., no model plans or reports, "how to" instructions, or standard government-wide measures).
- Implementing within existing agency resources as much as possible, and applying existing systems and processes.
- Emphasizing agencies' mission statements, and identification and development of performance measures so that performance goals (that will be based on trend data) can be properly set.
- Using a pilot phase (FY 1994-96) as a "lessons learned" opportunity to identify and resolve problems.
- Relying on annual financial statements under the Chief Financial Officers Act to build a foundation for and experience in performance measure in the departments and major agencies.

Social Marketing

Presenter: William Smith, Ed.D.
Executive Vice President, and Director for Social Development Programs
Academy for Educational Development, Washington, DC

Facilitator: Richard Horne
National Transition Alliance for Youth with Disabilities

During this session, Dr. Bill Smith, Executive Vice President and Director for Social Development Programs at the Academy for Educational Development (AED), discussed methods of using marketing concepts to deliver social services, including special education technical assistance, to audiences and clients. During his discussion Dr. Smith made several very important points:

1. Marketing is about audiences. It is about who audiences really are, and who they think they are. It is about how people feel. It is very much an emotional thing.

2. Marketing is about segments. It is about realizing there are different ways people feel about things. A segment is really a group of people who share the same dream. It can be a huge group. Marketers ask questions that explore the nature of people's hopes and dreams.

3. Marketing is about exchange. It is not about wisdom or knowledge, it is about the idea of getting something for something. A marketer asks, How can I satisfy the dreams of the audience? What can I do with my product and resources to help them satisfy one of their dreams?

One dilemma we often face is that our audience's values are not commensurate with our values. It is very difficult to design a message that appeals to everyone or that is completely ethical. For example, the Dominican Republic worked with AED to create a commercial intended to protect families from human immunodeficiency virus (HIV). The commercial depicted an alluring Dominican woman, and showed a Dominican man being attracted to her. The commercial might be offensive to some people, because the commercial illustrated the risk of contracting HIV from illicit affairs, but did not otherwise reprimand the man for being unfaithful or chauvinistic. But the commercial could not very well turn men into feminists while dealing with the issue of protecting families from HIV. It was an ethical tradeoff.

In social marketing, marketers sometimes find that an ethical tradeoff is too big. Sometimes you have to say, I do not feel comfortable with that; we have got to take another approach. But at the same time, you can not transfer all of your values to one population.

The Technical Assistance and Dissemination projects are going to face a lot of the same dilemmas. The American public is so distant from understanding the populations you serve, that you may have to market your services to them in stages. You may have to make some of those ethical tradeoffs, and do things that you, in the best of all worlds, would prefer not to do, in order to move your audience into your services. They have to get to one stage before they can move to another.

Dr. Smith recapitulated some important ideas to keep in mind when you market a product (or a service):

- Market a product in stages.
- Be willing to change the product, and your message.
- Be flexible. Say to clients or customers: What can we do to make you want this?
- Identify your audience's hopes and dreams. Recognize that audiences differ.
- Get your message across as quickly as possible, since your audience will have limited time and patience.
- Focus groups can be used to identify the hopes and dreams of your audience. (Though, focus groups are not surveys or statistical tools.)
- Consider what your audience thinks of you: What do they think is good? What do they think is bad? Address the bad, and don't change the good.

Improving Technical Assistance and Dissemination through Virtual Communities, Knowledge Webs, and Synthetic Environments

Chris Dede , Ph.D.
Professor, George Mason University, Fairfax, Virginia

Dr. Chris Dede, keynote presenter, talked about the future of information technology, using a video presentation to illustrate his points. The content of his presentation is summarized in a handout that he passed among the audience, the text of which is given below.

The development of high performance computing and communications is creating new media, such as the World Wide Web and virtual realities. In turn, these new media enable new types of messages and experiences; for example, interpersonal interactions in immersive, synthetic environments lead to the formation of virtual communities. The innovative kinds of pedagogy empowered by these emerging media, messages, and experiences make possible a transformation of conventional distance education—which replicates traditional classroom teaching across barriers of distance and time—into an alternative instructional paradigm: distributed learning.

Implications of New Media for Distance Education

What does the evolution of new media mean for distance educators? A medium is in part a channel for conveying content; new media like the Internet mean that we can readily reach wider, more diverse audiences. Just as important, however, is that a medium is a representational container enabling new types of messages (e.g., sometimes a picture is worth a thousand words). Since the process of thinking is based on representations such as language and imagery, the process of learning is strongly shaped by the types of instructional messages we can exchange with students. Emerging representational containers, such as hypermedia, enable a broader, more powerful repertoire of pedagogical strategies.

The global marketplace and the communications and entertainment industries are driving the rapid evolution of high performance computing and communications. Regional, national, and global "information infrastructures" are developing that enhance our abilities to sense and act and learn across barriers of distance and time. How information is created, delivered, and used in business, government and society is swiftly changing. To successfully prepare students as workers and citizens, educators must incorporate into the curriculum experiences with creating and utilizing new forms of expression, such as multimedia. Information infrastructures offer channels for delivering such technology-intensive learning experiences just-in-time, anyplace, and on-demand (Dede, 1994).

The "information superhighway" metaphor now widely used to convey the implications of high performance computing and communications is inadequate. Such an analogy is the

equivalent of someone in 1895 declaring that the airplane will be the canal system of the 20th century. Backward looking metaphors focus on what we can automate—how we can use new channels to send conventional forms of content more efficiently—but miss the true innovation: redefining how we communicate and educate by using new types of messages and experiences to be more effective. Since emerging forms of representation such as hypermedia and virtual reality are in their early stages of development, we are just beginning to understand how they shape not only their messages, but also their users.

Many people are still reeling from the first impact of high performance computing and communications: shifting from the challenge of not getting enough information to the challenge of surviving too much information. The core skill for today's workplace is not foraging for but filtering a plethora of incoming information. The emerging literacy we all must master requires diving into a sea of information, immersing ourselves in data to harvest patterns of knowledge just as fish extract oxygen from water via their gills. As educators, understanding how to structure learning experiences to make such immersion possible is the core of the new rhetoric. Expanding traditional definitions of literacy and rhetoric into immersion-centered experiences of interacting with information is crucial to preparing students for full participation in 21st century society (Dede, 1992).

Conventional distance education is similar to traditional classroom instruction, save that it uses technology-based delivery systems. In contrast, emerging forms of distributed learning are reconceptualizing education's mission, clients, process, and content; this new instructional paradigm is based both on shifts in what learners need to be prepared for the future and on new capabilities in the pedagogical repertoire of teachers. Four new forms of expression are shaping the emergence of distributed learning as a new pedagogical model:

- knowledge webs complement teachers, texts, libraries, and archives as sources of information,
- interactions in virtual communities complement face-to-face relationships in classrooms,
- experiences in synthetic environments extend learning-by-doing in real world settings, and
- sensory immersion helps learners grasp reality through illusion.

We are just beginning to understand how these representational containers can reshape the content, process, and delivery of conventional distance education. Information infrastructures are the lever for this evolution, just as the steam engine was the driver for the industrial revolution.

Knowledge Webs

"Knowledge webs" enable distributed access to experts, archival resources, authentic environments, and shared investigations. We are accustomed to asking a well-informed person in our immediate vicinity for guidance, to consulting printed information or watching a news program, to visiting exhibits (such as a zoo) to learn about different types of environments, and to conducting informal experiments to understand how reality works. Often, these information gathering and creation activities are constrained by barriers of distance, restricted access, scheduling difficulties, and the limits of one's personal expertise in investigation.

Via information infrastructures, educators and students can join distributed conferences that provide an instant network of contacts with useful skills, a personal brain trust with just-in-time answers to immediate questions. In time, these informal sources of expertise will utilize embedded "groupware" tools to enhance collaboration. On the Internet, on-line archival resources are increasingly linked into the World Wide Web, accessible through "webcrawlers" such as Mosaic and Netscape. Eventually, artificial intelligence-based guides will facilitate navigating through huge amounts of stored information.

Virtual exhibits that duplicate real-world settings (e g., museums) are emerging; these environments make possible a wide variety of experiences without the necessity of travel or scheduling. Distributed science projects enable conducting shared experiments dispersed across time and space, each team member learning more than would be possible in isolation about the phenomenon being studied and about scientific investigation. Combined, all these capabilities to enhance information gathering and creation form knowledge webs.

However, access to data does not automatically expand students' knowledge; the availability of information does not intrinsically create an internal framework of ideas that learners can use to interpret reality. While presentational approaches transmit material rapidly from source to student, often this content evaporates quickly from learners' minds. To be motivated to master concepts and skills, students need to see the connection of what they are learning to the rest of their lives and to the mental models they already use. Even when learners are drilled in a topic until facts are indefinitely retained—we all know that the sum of a triangle's internal angles is 180 degrees—this knowledge is often "inert"; most people don't know how to apply the abstract principles they memorized in school to solving real-world problems. To move students beyond assimilating inert facts into generating better mental models, teachers must structure learning experiences that highlight how new ideas can provide insights in intriguing, challenging situations.

The curriculum is already overcrowded with low-level information; teachers frantically race through required material, helping students memorize factual data to be regurgitated on mandated, standardized tests. Using information infrastructures as a firehose to spray yet more information into educational settings would make this situation even worse. Without skilled facilitation, many learners who access current knowledge webs will flounder in a morass of

unstructured data (Dede & Palumbo, 1990).

A vital, emerging form of literacy for educators to communicate is how to transform archival information into personal knowledge. However, moving students from access through assimilation to appropriation requires educational experiences that empower knowledge construction by unsophisticated learners, helping them make sense of massive, incomplete, and inconsistent information sources. Weaving learner-centered, constructivist usage of linked, online materials into the curriculum and culture of traditional educational institutions is a next stage of evolution for conventional distance education.

Virtual Communities

Virtual communities that provide support from people who share common joys and trials are a second capability for enhancing distributed learning. We are accustomed to face-to-face interaction as a means of getting to know people, sharing ideas and experiences, enjoying others' humor and fellowship, and finding solace. In a different manner, distributed learning via information infrastructures can satisfy these needs at any time, any place. Some people (shy, reflective, comfortable with emotional distance) even find asynchronous, low bandwidth communication more "authentic" than face-to-face verbal exchange. They can take time before replying to compose a more elegant message, as well as to refine the emotional nuances they wish to convey. This alternative conception of authenticity may reflect a different dimension to learning styles than the visual, auditory, symbolic, and kinesthetic differentiations now used.

To dramatically improve learning outcomes by evolving to new pedagogical strategies, distance educators need the virtual communities information infrastructures make possible. Learning is social as well as intellectual. Individual, isolated attempts to make sense of complex data can easily fail unless the learner is encouraged by some larger group that is constructing shared knowledge. In addition, institutional evolution is a communal enterprise; educational innovators need emotional and intellectual support from others who have similar challenges in their lives.

Moreover, formal education comprises only 19% of how students spend their time. No matter how well schooling is done, achieving major gains in learning requires that the other 81%of pupils' lives be educationally fulfilling as well. This necessitates close cooperation and shared responsibility for distributed learning among society's educational agents (families, social service agencies, workplaces, mass media, schools, higher education), which virtual communities can enhance. For example, involving families more deeply in their children's education may be the single most powerful lever for improved learning outcomes. Virtual parent teacher conferences and less formal social interchanges make such involvement more likely for parents who will never come to a PTA meeting or a school-based event. In many regions across the U.S., community networks are emerging that, among other missions, enhance education by enabling distributed discourse among all the stakeholders in quality schooling.

Another illustration of a distributed learning use for virtual communities is peer tutoring. This instructional approach aids all students involved both intellectually and emotionally, but is difficult to implement in traditional classroom settings. Outside of school, virtual interactions enhanced by groupware tools readily enable such student-student relationships, as well as preparing their participants for later use of distributed problem solving techniques in adult workplace settings. Telementoring and teleapprenticeships between students and workplace experts are similar examples of applying virtual community capabilities to distributed learning.

Creating a sense of communion among a distributed group linked by low to moderate bandwidth networking is a complex challenge. Some people favor technology-mediated communication as their most authentic way of sharing ideas and enjoying fellowship. Most people prefer face-to-face interaction, but find the convenience of just-in-time, anyplace access to others often outweighs the disadvantages of distributed sharing of ideas, experiences, and support. Groupware tools, a capable moderator, and shared interactivity and control are important for sustaining the vitality of virtual communities, as is occasional direct contact among participants.

To succeed, distributed learning must balance virtual and direct interaction in sustaining communion among people. A relationship based only on telephone conversation lacks the vibrancy that face-to-face interchange provides. Similarly, while digital video will broaden the bandwidth of virtual interactions on information infrastructures, teleconferencing will never completely substitute for direct personal contact. We can expect a variety of social inventions to emerge that provide the best of both worlds; for example, national professional conferences may sponsor pre- and post-conference virtual communities that enable participants to make the most of the limited face-to-face time they have. Through their expertise in encouraging interactivity across disparate geographic locations, distance educators have important insights to contribute to the evolution of virtual communities.

Shared Synthetic Environments that Complement Real World Experiences

Another emerging capability for enhancing distributed learning is shared synthetic environments that extend our experiences beyond what we can encounter in the real world. Information infrastructures are not only channels for transmitting content, but also communal virtual worlds that students can enter and explore. Just as single-user simulations allow an individual to interact with a model of reality (e.g., flying a virtual airplane), distributed simulations enable many people at different locations to inhabit and shape a common synthetic environment. For example, the U.S. Department of Defense uses distributed simulation technology to create virtual battlefields on which learners at remote sites develop collective military skills. The appearance and capabilities of graphically represented military equipment alter second-by-second as the virtual battle evolves ("dial-a-war").

Distributed simulation is a representational container that can empower a broad range of educational uses (e.g., virtual factories, hospitals, cities). The vignette below depicts a

hypothetical future application that promotes distributed learning outside the classroom through "edutainment."

EDUTAINMENT IN CYBERSPACE

Roger was unobtrusively sidling across the Bridge of the Starship Enterprise when the Captain spotted him out of the corner of his eye. "Take the helm, Ensign Pulver," growled Captain Jean-Luc Picard, "and pilot a course through the corona of that star at lightspeed 0.999. We have astrophysical samples to collect. You'll have to guard against strange relativistic effects at that speed, but our shields cannot stand the radiation flux we would experience through traveling less quickly." Roger had intended to sneak onto the Ecology Deck of the Starship and put in a little work on his biology class project in controlling closed-system pollution levels, but no such luck. Worse yet, he suspected that the Vulcan communications officer watching him while she translated a message in French was in fact the "avatar" (computer-graphics representation of a person) of a woman he admired who sat three rows behind him in his languages class. Of course, he could be wrong, she might be someone teleporting into this simulation from who knows where or could even be a "knowbot" (a machine-based simulated personality used to simplify the job of instructors directing an instructional simulation).

Buying a little time by summoning up the flight log, Roger glanced curiously around the bridge to see what new artifacts his fellow students had added since yesterday to this MUD (Multi-User-Dungeon or Dimension, a current type of adventure game in which Participants mutually evolve an elaborate, shared synthetic environment by continuously modifying its contents). In one corner, an intriguing creature was sitting in a transparent box, breathing a bluish-green atmosphere—maybe this was the long-awaited alien the anthropology and biology majors were creating as a mutual project. The 3-D goggles from his Nintendo set intensified the illusion that the lizard-like countenance was staring right at him.

"Impulse Engines to full speed, Mister," barked Captain Picard. "This Mage (human expert guiding the evolution of a virtual environment) seems rather grumpy for a regular teacher," thought Roger, "maybe he's a visiting fireman from the new Net-the-Experts program." On his Console, Roger rapidly selected equations that he hoped would yield the appropriate relativistic corrections for successfully navigating through the star's corona. He hoped to impress Captain Picard as a means of improving his chances for promotion. Last week's setback, getting motion-sick while "riding" on a virtual gas molecule that was illustrating Brownian motion, had not helped his chances . . . .

This vignette shows how education could be situated in a synthetic universe analogous to an authentic real-world environment, but more intriguing. Moreover, such a distributed learning strategy leverages a huge installed base of sophisticated information technology—home videogame consoles—as well as the substantial motivation inculcated by the entertainment industry.

Even without the added enhancement of visual imagery, the rise on the Internet of text-based shared synthetic environments (e.g., MUDs, MUSEs, MOOs) illustrates people's fascination with participatory virtual worlds. The continual evolution of distributed simulations based on participants' collaborative interactions keeps these shared virtual environments from becoming boring and stale. In contrast to standard adventure games, in which you wander through someone else's fantasy, the ability to personalize an environment and receive recognition from others for adding to the shared context is attractive to many people. Part of why we read fiction or watch dramatic productions is to escape the ordinary in a manner that increases our insights or refreshes us to plunge back into real world challenges. Shared virtual experiences on the NII can complement books, plays, television, movies, and concerts in their ability to take us beyond the daily grind—the challenge is to move past escapism into metaphorical comprehension and catharsis (Dede, in press).

Sensory Immersion to Grasp Reality Through Illusion

In addition to distributed simulation, advances in high performance computing and communications also are enabling learners' sensory immersion in "artificial realities." Via an immersion interface based on computerized clothing and a head-mounted display, the participant feels "inside" an artificial reality rather than viewing a synthetic environment through a computer monitor's screen; virtual reality is analogous to diving rather than looking into an aquarium window. Using sensory immersion to present abstract, symbolic data in tangible form is a powerful means of attaining insights into real world phenomena (Dede, 1993b).

For example, "visualization" is an emerging type of rhetoric that enhances learning by using the human visual system to find patterns in large amounts of information. People have very powerful pattern recognition capabilities for images; much of our brain is "wetware" dedicated to this purpose. As a result, when tabular data of numerical variables such as temperature, pressure, and velocity are transfigured into graphical objects whose shifts in shape, texture, size, color, and motion convey the changing values of each variable, increased insights are often attained. For example, graphical data visualizations that model thunderstorm-related phenomena (e.g., downbursts, air flows, cloud movements) are valuable in helping meteorologists and students understand the dynamics of these weather systems.

As information infrastructures increasingly enable people to access large databases across distance, visualization tools can expand human perceptions so that we recognize underlying relationships that would otherwise be swamped in a sea of numbers. One good way to enhance creativity is to make the familiar strange and the strange, familiar; adding sonification and even tactile sensations to visual imagery can make abstract things tangible and vice versa. For example, expanding human perceptions (e.g. allowing a medical student—like Superman—to see the human body through X-ray vision) is a powerful method for deepening learners' motivation and their intuitions about physical phenomena. My current research centers on assessing the potential value of sensory immersion and synthetic environments for learning material as disparate as electromagnetic fields and intercultural sensitivities (Salzman, Dede,

Loftin, in press).

The vignette below illustrates how sensory immersion might someday be combined with knowledge webs, virtual collaboration, and synthetic environments to enable powerful forms of distributed learning.

COLLABORATIVE TRAINING IN A SHARED SYNTHETIC ENVIRONMENT

Karen sat down at her educational workstation, currently configured as an electronics diagnosis/repair training device. When sign-in was complete, the workstation acknowledged her readiness to begin Lesson Twelve: Teamed Correction of Malfunctioning Communications Sensor. Her "knowbot" (machine-based agent) established a telecommunications link to Phil, her partner in the exercise, who was sitting at a similar device in his home thirty miles away. "Why did I have the bad luck to get paired with this clown?" she thought, noting a hung-over expression on his face in the video window. "He probably spent last night partying instead of preparing for the lesson." A favorite saying of the problem solving expert to whom she was apprenticed flitted through her mind, "The effectiveness of computer-supported cooperative work can be severely limited by the team's weakest member."

"Let's begin," Karen said decisively. "I'll put on the DataArm to find and remove the faulty component. You use the CT (cognitive transducer) to locate the appropriate repair procedure." Without giving him time to reply, she put on her head-mounted display, brought up an AR (artificial reality) depicting the interior of a TransStar communications groundstation receiver, and began strapping on the DataArm. The reality-engine's meshing of computer graphics and video images presented a near-perfect simulation, although too rapid movements could cause objects to blur slightly. Slowly, she "grasped" a microwrench with her "hand" on the screen and began to loosen the first fastener on the amplifier's cover. Haptic feedback from the DataArm to her hand completed the illusion, and she winced as she realized the bolt was rusty and would require care to remove without breaking.

Meanwhile, Phil called up the CT for Electronics Repair; on the screen, a multicolored, three-dimensional network of interconnections appeared and began slowly rotating. He groaned; just looking at the knowledge web made his eyes hurt. Since the screen resolution was excellent, he suspected that last night's fourth margarita was the culprit. Phil said slowly, "Lesson Twelve," and a trail was highlighted in the network. He began to skim through a sea of stories, harvesting metaphors and analogies, while simultaneously monitoring a small window in the upper left-hand corner of the screen that was beginning to fill with data from the diagnostic sensors on Karen's DataArm.

Several paragraphs of text were displayed at the bottom of the screen, ignored by Phil. Since his learning style was predominantly visual and auditory rather than symbolic, he listened to the web as it vocalized this textual material, watching a graphical pointer maneuver over a blueprint. Three figurines were gesturing near the top of the display, indicating that they knew

related stories. On the right hand side of the monitor, an interest-based browser showed index entries grouped by issue, hardware configuration, and functional system.

Traversing the network at the speed with which Karen was working was difficult, given his hangover, and he made several missteps. "Knowledge Base," Phil said slowly, "infer what the optical memory chip does to the three-dimensional quantum well superlattice." The voice of his knowbot suddenly responded, "You seem to be assuming a sensor flaw when the amplifier may be the problem." "Shut up!" Phil thought savagely, hitting the cut-off switch. He groaned when he visualized his knowbot feeding the cognitive audit trail of his actions into the workstations of his trainer and the corporation's communications repair expert; he could not terminate those incriminating records. Phil cringed when he imagined his trainer's "avatar" giving him another lecture on his shortcomings. Mentally, he began phrasing an elaborate excuse to send his instructors via email at the termination of the lesson.

Meanwhile, Karen was watching with exasperation the window on her AR display in which Phil's diagnostic responses should have been appearing. "He's hopeless," she thought. Her knowbot's "consciousness sensor" (a biofeedback link that monitors user attention and mood) interrupted with a warning: "Your blood pressure is rising rapidly; this could trigger a migraine headache." "Why," Karen said sadly, "couldn't I have lived in the age when students learned from textbooks . . . ."

Young people like magical alternate realities, and the entertainment industry profits by providing amusement parks, videogames, movies, and television programs that build on this fascination. Distance educators too can profit, in a different way, by building eerily beautiful environments for sensory immersion that arouse curiosity and empower shared fantasy, leading to guided inquiry. If we forswear distributed learning based on mystery, intrigue, and "edutainment," we risk losing the generation growing up with high-performance computing and communications to the mindless mercies of videogames.

Assessing The Impact of Distributed Learning on Conventional Schooling

The distributed learning vignettes depicted above may seem financially implausible; where will schools, colleges and universities find the resources to implement these alternative pedagogical models? An analogy can be drawn to the early-1980s competition among cable TV vendors to receive exclusive franchises from communities. Those educators smart enough to participate in that bargaining process received substantial resources—buildings wired for free, dedicated channels, sophisticated production equipment—because the vendors knew public service applications would help determine who won. In the same manner, during today's much larger war in the information services industry, distance educators that have innovative alternatives to "talking heads" instruction can find vendors happy to share the costs in exchange for help with the regulators, legislators, and judges who are determining which coalitions will manage the nation's information infrastructures.

However, as with business, the evolution of technology creates new markets and expanded competitors for schools and colleges. As one illustration, prestigious universities may develop nationwide offerings of standard courses (e.g. PSYCH 101) taught by telegenic, internationally recognized authorities. In such a strategy, high production-value presentations would be coupled with frequent, interactive teleconferences; mentoring via electronic mail, and occasional face-to-face meetings of locally enrolled students led by a practitioner. This approach would not intrigue learners interested in a residential college experience, but could be very attractive to students at commuter campuses. With sufficient economies of scale, this delivery method would have lower costs than our present system of similar standard courses duplicated at every institution. While many faculty would disparage this type of instruction, state legislatures could easily see such a model as an attractive way to cut their expenditures for higher education—a method applicable to every course for which a substantial textbook market exists.

In such an evolution of distance education, colleges and universities would be reshaped as profoundly as American business has been altered by technologies enabling the global marketplace. Given their responsibilities for socialization and custodial protection, public schools would be less affected by the erosion of geographic monopolies through distributed learning technologies. However, the home schooling and educational voucher movements see information infrastructures as an attractive alternative means of instructional delivery. If distributed learning is not incorporated into public schools' classrooms, teachers may find a decade from now that they have a smaller fraction of students enrolled and fewer taxpayers willing to provide funding.

Transforming Distance Education to Distributed Learning

Today, distance education is primarily used in selective situations to overcome problems of scale (not enough students in a single location) and rarity (a specialized subject not locally available). Such instruction is often seen as "half a loaf" pedagogy; better than nothing, but not as good as face-to-face teaching. However, the global marketplace and emerging information infrastructures are changing this situation. Educators must help all students become adept at distanced interaction, for skills of information gathering from remote sources and of collaboration with dispersed team members are as central to the future American workplace as learning to perform structured tasks quickly was to the industrial revolution. Also, by increasing the diversity of human resources available to students, distributed learning can enhance equity—as well as pluralism to prepare for competition in the world marketplace. Virtual classrooms have a wider spectrum of peers with whom learners can collaborate than any local region can offer and a broader range of teachers and mentors than any single educational institution can afford.

In a few years, high performance computing and communications will make knowledge utilities, virtual communities, shared synthetic environments, and sensory immersion as routine a part of everyday existence as the telephone, television, radio, and newspaper are today. Distributed learning experiences will be seen as vital for all learners even when the same content

could be taught face-to-face, and all teaching will have some attributes of "distance education" (Dede, 1993a). Keeping a balance between virtual interaction and direct interchange will be important, however. Technology-mediated communication and experience supplement, but do not replace, immediate involvement in real settings. High performance computing and communications won't be a "silver bullet" that magically solves all problems of education; thoughtful and caring participation is vital for making these new capabilities truly valuable. Even then, at times a sloppy, handwritten note delivered through surface mail will mean more to the recipient than an instantly transmitted, elegantly formatted electronic message. New media complement existing approaches to widen our repertoire of communication; properly designed, they need not eliminate choices or force us into high tech, low touch situations.

How a medium shapes its users, as well as its message, is a central issue in understanding the transformation of distance education into distributed learning. The telephone creates conversationalists; the book develops people with imagination, who can conjure a rich mental image from sparse symbols on a printed page. Much of television programming induces passive observers; other shows, such as Sesame Street and public affairs programs, can spark users' enthusiasm and enrich their perspectives. As we move beyond naive "superhighway" concepts to see the true potential impact of information infrastructures, society will face powerful new interactive media capable of great good or ill. Today's "couch potatoes," vicariously living in the fantasy world of television, could become tomorrow's "couch funguses," immersed as protagonists in 3-D soap operas while the real world deteriorates. The most significant influence on the evolution of distance education will not be the technical development of more powerful devices, but the professional development of wise designers, educators, and learners.

(A bibliography of Dr. Dede's references is available from the FRC.)

The Role of Technical Assistance in Improving Results Through Systems Change

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Contextual Background

I will give you a little information about the state structure that we are working to influence, that we are being influenced by, that we are constantly dancing around. This structure actually developed very recently and includes: the State Departments of Child Welfare, Alcohol-Substance Abuse, and Mental Health; the State Board of Education; and the Federation of Families for Children. The state of Illinois had a very good strategy for reducing residential placements, which involved funding and tightening up the criteria and restrictions. The state also looked at the criteria for approving residential placement, and mandated such things as establishing interagency contacts prior to using a residential placement. This made it harder to send a student away. The state tied funds legislatively to community support for students with Emotional Behavioral Disabilities (EBD). When about $1 million dollars became available, the State of Illinois used it to further develop education programs. Interagency networks were developed out of the Department of Mental Health to motivate interagency planning and mingling of funds at state and local levels. We looked for a pool funding initiative, which is one of the major tenets of using the wraparound approach for students with EBD. Pool funding means you do not use your money categorically, but for whatever is needed.

Local Area Networks

By establishing spending criteria, the special education community was forced to work with their interagency partners through local area networks. Agencies realized they did not know how to extend to school districts the monies that came from different sources in the State Department. An interagency management team at the state level was formed, to get pooled money working in school districts where it was needed. Unfortunately, the commitments of all state code agencies were not equal. The strongest leadership has clearly been from the Illinois State Board of Education. Our goal is to bring along other partners at the interagency level into the local network.

Local Area Network Liaisons. The state decided on contracts, requirements, and uses of IDEA money to form a local area network liaison (LANL) team to gather information and coordinate technical assistance in local areas. The LANL team was composed of former project directors of systems change projects, working with partners from mental health and child welfare and in each region of the state. People from LAN liaisons became technical assistants to the Local Area Networks Steering Committees. There are sixty-two local area networks in the state.

We trained the LAN liaisons to help local area networks develop implementation procedures, and to applied the wraparound approach through community based teams. Training blitzes focused on helping staff from multiple agencies learn how to do this wraparound approach together; how to work together in child-family teams; how to use resources creatively; and how to move beyond categorical activities.

Technical Assistance. There was a lot of technical assistance around infrastructure development at the local and regional levels. For about a year we did a combination of hands-on training in wraparound plans for children, youth, and families, and how to organize an infrastructure to support it. After about a year and a half, it became clear that education was not invested enough, even though it was mostly school money. School is the place where the biggest breakdown with these children occurs. So we started moving deeper into the schools at that point. We are still supporting this interagency network at all levels. Our regional technical assistance representatives through our EBD network are LAN liaisons. Our special education directors represent our LAN Steering Committee. Special education supervisors and social workers often sit on our interagency case review teams.

We have profiles from which people can choose. One is a systems survey, with a series of data pieces one can collect about students in a behavioral disorder (BD) program. We give people a profile of their system and help them design technical assistance around their BD system based on the evaluation data.

The idea was to let the local districts decide the course of action. We tried to not impose too many guidelines, because we are trying to move to local decision-making around children and families who were at-risk, or returning from out-of-community placement. But within that large group of students, the local area networks could target whomever they wanted as their priority children.

Planning is a critical factor of identifying all the technical assistance and the training. How do you get the team to own the plan? How do get the family to own the plan? How do you get the teacher to own the plan, as opposed to the service providers? One plan has to integrate mental health, education, the IEP, juvenile justice, and other parties. You can not put all of that in an IEP. We have to figure out how to be able to form a plan throughout the system.

Pooled Funding. Until we had pooled funding, there was no monetary motivation for people to work at the local area network level, even though the white paper had been written and the reform plan had been laid down and blessed by the governor. The LANs were functioning and reviewing children before the pooled funding as part of an interagency case review process. At the state level, we use IDEA funds and mental health funds. I know that it includes part B discretionary funds that can be used for projects that address more than just students with IEPs.

Wraparound and IEP Planning

At the local level, a plan for a child and a family takes precedence. That is where the Individualized Education Program (IEP) comes up as a document. We do wraparound planning firstly, and then we translate the educational concepts and services that resulted from the wraparound planning process into the IEP. The IEP becomes a sub-document. Once you put the IEP on the table, special educators tend to get less creative and less willing to brainstorm. They fall into regulatory and bureaucratic behavior, posture and procedures. (In the LADSE area, we are now using the wraparound planning process for all IEPs. System-wide, the LADSE system functions on a wraparound approach. Students, who do not even have much in the other multiple life domains, have a wraparound process that drives their IEP planning.)

Underidentification of Students

We know there are many more students with serious emotional behavioral disabilities than have been identified, so we have a serious under-identification problem. We identify 1% or less of the school-aged population as having a significant emotional behavioral disability, and less than 1% nationally. The prevalence of children who have a significant emotional behavioral disability is serious enough to warrant intervention by more than one system, including education. The most conservative figure in the literature is 6%; the highest, 14%. But even if you take the conservative figure of 6% of students who have serious emotional behavioral disabilities—while we identify 1% or less—we are not going to come close to higher identification percentages by restricting identification measures to students who have IEPs.

Evaluation

We are trying to find a way to evaluate how many students and families receive a wraparound approach, and how many of them do not need services funded by flex funds. Right now, I am tracking only students and families that need flex-funded services. There are many children and families receiving wraparound plans, but they are not even using the flex funds. That is where the long term systems change process is a critical aspect of our technical assistance.

One of the basic tenets of wraparound is that more is not necessarily better. Sometimes different is better than more. We want to be sure that people examine how to use existing resources differently. This is the biggest challenge facing the delivery of wraparound is the schools, because schools have been "the only mandated service provider" for this population.

Our evaluation data are interesting because we have two year's worth of data on ISBE funded Phase II projects. In addition to that, our state board of education network is also collecting evaluation data on the flexible funding (flex fund) initiative. Across all sixty-two LANs in the state, we have data on about eighty-five students. We have two LANs that merged for our Center for Mental Health Services grant. It is like a $5 million dollar grant over five years

to implement this process in three communities, two communities, two LANs. We are constantly taking evaluation data back and forth. We ask, what do you want to know? Are we targeting the students with the most need? Are the families involved enough, do they feel committed?

The Center for Mental Health Services evaluated all twenty-two sites. One of our most important findings was the relationship between a student's level of clinical function, and the restrictiveness of her or his educational placement. They found there is no relationship between clinical function and restrictiveness of placement. That is very critical to educators thinking about how to position comprehensive support for students with EBD. Students with a high rate of out-of-home placement were in the most restrictive, moderately restrictive, and less restrictive placements. In less restrictive placements, 50% of students had a severe clinical functioning rating. Fifty percent of the students in the least restrictive setting had a severe clinical dysfunctional rating. Schools in the ISBE Phase II Project were mostly targeting students at risk of moving to a more restrictive setting. Education placement changes occurred irrespective of the students' levels of emotional and behavioral functioning. We found that students who were not in the clinical range were moved into more restrictive settings, and students who were in the clinical range were moved into less restrictive settings. The out-of-home placement was one of the most statistically significant placements. Forty-three percent of students were in out-of-home placements at the time of referral. After one year of services, only 10% of students had been in an out-of-home placement at all, while 43% were at the beginning. These students are the main ones we have addressed in our technical assistance and training meetings among local education agencies (LEAs), regional special education people, and interagency teams.

Before we evaluate a wraparound plan, we take the plan and analyze the types of services that are identified and compare them to traditional IEP planning for students. For example, we found a category of service called "in-school respites" that had an in-community respite, mentors in the community, mentors in school, and other activities that did not exist anywhere before. We analyze the plan and try to establish categories of service as reflections of change and approaches.

One of the indicators at the system level involves new roles for special educators. For example, in the LADSE community, we do not identify school social workers attached to our EBD programs. We call them family service facilitators. After we analyzed the wraparound plans, we found the bulk of their role was directed at the family—not in terms of providing therapy or counseling, but in terms of facilitating services that families needed. So we have changed the role of social workers. We used to have the crisis intervention teacher, who floated among BD (behavioral disorder) classes to put out fires. That person is now called a "Team Teacher Technical Assistance Facilitator" and they have a more proactive role. They go into the classroom and help implement strategies and observe and support the teacher.

We did some cost analysis of services for the original 15 students. We had to estimate what each alternative placement would cost. We used estimates of out-of-home care against costs to begin that process. Mental health costs are easier to estimate than education costs, because

mental health has unit costs attributed to different aspects of mental health care. For example, in home therapy, there's meeting facilitation and hands-on family support. There used to be just bills for therapy time. We changed the funding system to a managed care funding approach. Instead of the LADSE Special Education cooperative paying $17–18,000 per year for segregated school placement, we set up a network to keep students in their schools. We brought the wraparound processing team to the school and infused ourselves around the school services. The schools did not have to pay for the transportation, for the teacher at this other program, or any related costs. We had to come up with an estimate tuition cost to "place" a student in the network. We bundled the services. We guessed the number of students we would have in the network, and we came up with a ratio of family service provider to caseload of ten to one in the first year. We upped it to fifteen to one during the second year. Then we upped the family service facilitator caseload, dropped the team teacher caseload, and kept the tuition the same. So if you keep a student in level two, it might cost $4000, whereas if you sent that student to another program it would cost $18,000. In the mental health project, we estimate the unit cost of a student's plan. Then we estimate the number of days a student would have spent in a hospital.

Right now, directors involved in the project are asking, Why is all the money being spent this way? We are trying to give them the education part of the mental health grant. A subcommittee examined where the money was spent and the results of evaluation data on students' breakdown in schools. The directors asked to see the criteria that we used to give severe ratings. We showed them "The Child and Adolescent Functioning Assessment Scale," which shows life domain functioning. Schools had the highest rates of severe clinical dysfunction in their first wave of students. School is the first place from which students get expelled. Then the directors were more open to talking about how to use the educational money. They put together a job description of people they wanted to hire who would influence what happens with these students involved in the mental health grant in the schools.

Handouts included: ISBE EBD Technical Assistance Network Planning: Components of Effective Technical Assistance; Activities and Accomplishments; Where Do We Want to Go?; Proposed Long-term Goals of the Regional EBD Network.

ISBE EBD TA NETWORK PLANNING
Components of Effective Technical Assistance

Wide range of TA/Training:
- A range of TA training opportunities are available & accessible
- An accessible information network is developed

Cross agency/inclusive:
- Develop training TA materials for schools & parents
- Widespread training and TA at a variety of levels (awareness to trainer of trainers)
- Educators trained to facilitate wraparound approach into the school day

Parent focused:
- Affects the political climate
- Cross agency inclusive training

Education focused:
- TA and training that crosses audiences (administration/social workers/teachers)
- Local trainers are developed from education, mental health and social service

Develop a TA/Training infrastructure:
- Regular ongoing communication between state/regional/local
- Coordination of all the training/ TA activities in the area
- Support flexible of use of funds in education

Build local capacity:
- Fluid training that crosses agencies
- Integrate regular and special education
- Promote parent/professional partnerships, empower families & communities
- Utilize local people for training

Common Themes:
- Collaboration, communication
- Political activism
- Training beyond the wraparound process to include interventions
- Generate resources
- Better use of technology; use satellite technology and electronic conferencing
- Utilize regional structures to develop local plans
- Think regionally, act locally
- Marketing
- Cross regions (agencies) schools

ACTIVITIES/ACCOMPLISHMENTS
(as of June 1995)

1. Collect evaluation data on child/family outcomes and systems change to guide state and local efforts.
2. Increase interagency activities at the child/family team level; develop more school-based mental health services.
3. Statewide TA and training:
   - TA and training activities at local levels
   - State, regional and local wraparound trainings
   - Chicago Public Schools principal trainings
   - Development of the structure for statewide interagency training plan and needs assessment
   - Training activities at local, regional and state levels
   - Planning activities at local, regional and state levels
4. Increased parent voice in IFF and Parent-LAN Liaisons.
5. ISBE TA Representatives available to support school initiatives and LAN development
6. Restructured school options, staff roles, use of resources
7. Flexibility in personnel reimbursement

WHERE DO WE WANT TO GO?
June, 1995

1. Build School Capacity, position support for schools regarding children with EBD.

2. Develop strategies for schools that lead to better outcomes, more options, productive interagency partnerships.

PROPOSED LONG-TERM GOALS OF REGIONAL EBD NETWORK
December 6, 1995

To improve outcomes for students with or at-risk of EBD and their families by:

1. Increasing school-based technical assistance and training opportunities.
2. Continuing LAN Liaison support to improve educational participation with community representatives.
3. Supporting local/regional and state funding coordination to operationalize re-directed resources around children/families at the community level.
4. Building local resource team capacity.

The Role of Technical Assistance and Evaluation in Systems Change: Illinois State Board of Education (ISBE)'s Technical Assistance and Evaluation Network for Students with Emotional and Behavioral Disabilities

a handout from Lucille Eber, Ed.D.

Purpose. This presentation describes how technical assistance (TA) and evaluation can be critical aspects of a systems change process. This involves the integration of TA and evaluation into program development and implementation from the policy level to the day-to-day practice level. The Illinois State Board of Education (ISBE) Emotional and Behavioral Disabilities (EBD) Network will be used as an example to illustrate the dynamic nature of TA and its role in systems change driven by outcomes. The Illinois example will describe how TA and evaluation can change from support provided to designated projects to an initiative that is focused on building local school districts and communities and capacity by incorporating TA and evaluation into their program development and implementation strategies.

Rationale. For TA and evaluation to be outcome driven and part of a systems change process, the people who live/work in the systems need to own, direct, and control the evaluation and TA. Change is inevitable if people are constantly looking at themselves, their needs, and what supports are necessary to achieve the outcomes they have set. A system that is introspective and critical of what it is doing cannot remain static. TA and evaluation can provide a road map for change. If the individual players in the system have a common vision and common recognition of a needed system change, marking milestones and identifying and providing supports needed to achieve outcomes can keep a changing system on track.

Components of the Integrated Process. The interactive components of the systems change process to improve outcomes for students with emotional and behavioral disabilities (EBD) and their families consists of interactive components which include (1) service provision; (2) technical assistance; and (3) evaluation.

The overall goal of this statewide network is to build local capacity for improving outcomes for students with or at-risk of EBD through interagency networks and strengthened school-based options. Diagrams A and B illustrate these major system components and their interactive nature of the ISBE Network.

This Network is currently in the process of transitioning into a regional and local infrastructure to ensure that capacity for sustaining change and improved outcomes is built into local service delivery. This process has involved a merge of initiatives across agencies at a state, regional and local level. Unplanned events as well as positive results of planned initiatives have led to changes in the role of technical assistance and evaluation throughout this process. A common vision of improved options and outcomes for children with or at-risk of EBD and their families and a commitment to building local capacity have guided the process.

Program Evaluation: Improving the Flow of Information to Congress

Gail MacColl, Assistant Director
Program Evaluation & Methodology Division,
U.S. Government Accounting Office

The U.S. General Accounting Office was asked by the U.S. Senate Committee on Labor and Human Resources Committee to: (1) identify the kinds of information that would be most useful for oversight and reauthorization review of three programs; (2) examine the extent to which agencies collect and report such information; and (3) propose a strategy the Committee could use to improve access to this information. The three programs for the GAO Study included the: (1) Comprehensive Child Development Program (CDDP); (2) Community Health Centers; and Chapter 1 Elementary and Secondary Education Act (ESEA) program of grants to states. The final report was titled, *Program Evaluation: Improving the Flow of Information to the Congress*, and published in January, 1995.The findings of that report and suggestions for the technical assistance & dissemination projects were shared by Gail MacColl.

First, Congressional Committees want descriptive narrative information that conveys What's being done with federal funds? What activities are being conducted and by whom? How extensive and costly are the activities and whom do they reach? If conditions, activities, and purposes are not uniform throughout the program, in what significant respects do they vary? Ms. MacColl suggested including not only descriptive statistics but vignettes and examples as well.

Second, Congressional Committees want information on implementation of the programs as they were intended, including progress made in implementing new provisions, feasibility or management problems, and how activities and products have conformed to professional standards.

Third, Congressional Committees want information that describes how program activities and products have focused on appropriate issues or problems. To what extent have the activities reached the appropriate people? Do current activities leave significant needs unmet?

Fourth, Congressional Committees want information on the impact and effects of programs. Has a program led to improvements consistent with its purpose? How has the impact varied across program components, approaches, clients, or providers? Are there any components have failed to show an impact? Are there important positive or negative side effects?

Finally, Congressional Committees want to have information from a comparative analyses that documents why a program is more effective in relation to its costs than others. What advantages are there in having a federally-funded program address needs?

Standards for the Dissemination of Exemplary and Promising Programs and Practices

Susan Klein, Ph.D.
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The Office of Educational Research and Improvement (OERI) is responsible for developing programs of research and improvement in education. In its 1994 reauthorization, OERI was mandated a leadership role in identifying standards for designating educational programs as exemplary and promising and a system of expert panels to use these standards. These standards will become a part of the National Education Dissemination System (NEDS). OERI is also responsible for using research to improve educational practice. OERI personnel actively look for ways to apply research to practice, and for other research methods and research sponsors. As OERI personnel identify a promising practices, the federal government, private foundations, and others fund comparative evaluations and dissemination activities.

Dr. Klein currently is working on a paper titled "Leadership in Developing a Nationwide, Consumer-Oriented, Topic-Focused Research and Dissemination Evaluation System." Her paper is based on three types of standards for dissemination that are part of OERI's charge: (1) reviews of grant proposals; (2) identification and designation of exemplary and promising programs; and (3) performance evaluations of OERI programs.

OERI is working with other federal agencies to develop the National Education Dissemination System through which exemplary practices will be disseminated to educators. This dissemination system will have a consumer-oriented perspective, delivering practices and programs that consumers say they need. OERI is funded to create expert panels to identify exemplary practices, and these panels will be an important part of the dissemination system. The dissemination system will be based on four core categories of standards and procedures:

1. National Need and Significance
2. Intrinsic Quality
3. Usefulness to Others
4. Effectiveness

Dr. Klein recommended that the Technical Assistance and Dissemination Projects develop criteria on what represents standards for exemplary and promising programs and activities before disseminating them.

Dr. Klein spoke at the TA&D Conference as an individual. Her views do not necessarily represent the policies of the United States Department of Education.

Summary Session

Summary Session

Facilitator: Barbara Hanft, Consultant

The summary session included reports from topical discussion groups; prioritization of recommendations; and next steps. Barbara Hanft started the summary session by asking participants to think about where the technical assistance and dissemination projects want to move ahead. What's important? she asked them.

Given the reauthorization of the Individuals with Disabilities Education Act (IDEA), who is going to need what? What is the identity of the Technical Assistance and Dissemination (TA&D) projects going to be? Think about what Jack Jennings and Bill Smith said. What is your message? What is your identity going to be? Everyone acknowledges that the state improvement plans are going to be a major component of IDEA once it is reauthorized. States and local education agencies are still going to have to provide services to children and youth. In order to answer these questions, the projects have to have some content, products, or specific services to define what the projects are and what they do.

The future technical assistance and dissemination system may not necessarily continue with the same projects, activities, and focus. So the network needs to think about what will consumers and clients need in terms of services and products. The social marketing session discussed segmenting your audience. While some aspects of the current system may stay the same, the messages will have to be reframed to meet the wants and desires of your consumers. You really need to look at your different audiences. So I would pose these broad tasks to you, to help you think about action steps. There is also the issue of a collective identity of projects versus a global identity. When you go to market to Congress the necessity of the TA&D network, the necessity to support it, you will have to be very specific. That's when you have to bring back your individual identities.

Within the next two months the technology and marketing groups have identified activities, persons responsible, and timelines. The groups will focus on: (1) improving communication technologically; (2) defining the TA&D network's message and identity.

The evaluation group highlighted there is a need for a common language. They also discussed the fact that there are two major levels to consider regarding impact. The first level is what did a project actually do for a state education agency or some of the local education agencies? What happened? What were the direct impacts of these agencies in taking the information and bringing it down to serve the needs of children and families?

When you're considering your bold actions, you don't have three of four years to write a report. What you need to consider is what can you get done in six to eight months, a year at the most. What can you do to start addressing the recommendations of the three groups?

If you are going to respond to the suggestion that the projects need to write a report showing impact, people will have to pull out data.

The Marketing Group suggested forming a followup group that will work on reframing discussions which might be helpful to individual projects. What will the TA&D projects say about what states will need? Then each of you would think about how your project could fill these needs and, collectively, how could the TA&D network fill these needs. What might the technical assistance and dissemination system look like then? Is there a core group that would start analyzing the proposed IDEA reauthorization legislation in terms of state improvement plans?

The evaluation group wants to produce a draft evaluation framework around performance indicators.

Topical Discussion Group Reports

Technology Group

(Many members of this group were at the 1995 TA&D Conference.) We identified some relatively immediate bold actions, things that we could do right away, and we talked about what happened last year. Last year when we asked how many people have been on World Wide Web or have access to a web browser, about a third of the hands went up. This year almost everybody not only has access to a browser, most projects have web pages either up or about to be to ready. The technology has moved ahead. Now we are thinking about how to link things together, and dealing with some of the issues that the mechanism of dissemination has created for us, as well as broadening our scope from technology. Last year we were thinking mostly about the web because it's new. Now we have a bit broader scope.

Some of the issues discussed included access to the Web and Internet to the less well equipped. There are a lot of issues surrounding "the technological underclass." We are concerned that some parent centers, and the less well-to-do school districts and individual communities, have no access to a potentially rich information source. We need strategies to help communities or organizations get connected and make use of the technology, and to help get older equipment redistributed to make access possible for people who don't have any equipment at all. A related issue is, how do we get people who are well-equipped, and don't know it, to become users? Other issues addressed how to make an Electronic Information System efficient, effective, and useful to people; evaluation standards in web page development; how to determine what is good for the web and what is good for other mechanisms of delivery; and how to make others move away from using technology (as we are doing now) primarily for some group work and for information dissemination, technical assistance, delivery training, personnel development, and organizational change using technology methods.

Recommendations from the Technology Group

1. Disseminate guidelines to the TA&D projects on accessible web page development. We have material already identified and we are going to make it available to everybody.

2. Develop a ListServ for all OSEP-funded Technical Assistance & Dissemination projects. The ListServ will be set up within the next few months. Information about participation in the List Serve will be sent to all TA&D Projects.

3. Create a bookmark collection of the best sites in education. Several people have started on that. It will be an evolving effort. Send sites identified by the TA&D project to create that list. We are all going to contribute to that list.

4. Gather information about search engines; deliver guidance on how to pick a good search

engine to explore the web.

5. Survey all the remaining TA&D projects to extend the consultation of current activities begun at this conference.

6. Complete and disseminate the Alliance 2000 survey of TA&D projects on minority focus initiatives and the need to develop the expertise of underrepresented individuals. That is Judy Smith Davis' project, but all of us will be involved as informants.

7. Plan for a technology training demonstration at next year's conference. We had thought we could provide input for that right now. But if we had provided input last year on what we need to know this year it would be nine months out of date. What we are suggesting is to get information about that planning process. Conduct an assessment on sophisticated, more sophisticated, and less sophisticated users of technology. Get some skill-building sessions in the conference next year.

8. Consider what can or should be done by the TA&D projects in light of the uncertain future. This is a not so optimistic but nevertheless a bold action. If the worst were to happen and Congress makes great cuts, we all have a wealth of information, thousands of dollars in information systems and materials and ways to distribute it, that we simply can't ignore. What are we going to do with all of this? How are we going to plan to have something survive put to good use?

Evaluation Group

We agree that there are two levels of impact: Level one is what our direct recipient did with what we provided. Level two is what happened with what they did: for instance, what happened to students as a result of that. So that we will be in our future discussions, probably, talking about level one and level two impacts.

We generated twelve new ideas; things we could do collectively, then we voted on them and asked what was important to us. We have talked about the possibility of taking the RRC Paper and turning it into an a network-wide paper that involves all technical assistance and dissemination projects. What is impact evaluation?

We talked about moving ahead with the Government Performance Results Act (GPRA) of 1993 and writing performance indicators that represent all of the TA&D Projects. That would give us an opportunity to be proactive and define what is our future and what we should be accountable for and what OSEP should be accountable for regarding technical assistance and dissemination. We also talked about taking Part B from the IDEA results evaluation concept and developing a framework. What should we be focusing on is results from Part B and how we can help our states and other constituencies.

We talked about funding a third-party evaluation to look at the structural rules that affects all the projects. What can we contribute to a composite report on the technical assistance and dissemination projects?

We talked about a Conceptual Model for technical assistance and dissemination projects. It would describe how they fit together logically. We involved David Osher and asked him to describe what's he doing regarding technology projects.

We talked about the possibility of being engaged in gathering evaluative information about special education and positive stories about effects of educating youth with disabilities. We discussed developing a system for validating promising and exemplary practices as a follow-up to Susan Klein's discussion.

We talked about having each project develop its own conceptual model and compiling the models into a paper on describing how each project causes impact.

Recommendations from the Evaluation Group

1. One is that we are going to share information, share some materials on what GPRA is about and share a summary of our meeting.

2. The Mid-South RRC will gather some information on the identified issues and start an ongoing dialogue. But we should have periodic conference calls on evaluation issues that

create a learning network.

3. Produce performance indicators consistent with GPRA that have the commitment of our constituencies. Understand those indicators and how they reflect on us. The RRCs are probably going ahead and looking at indicators for their network, and NEC*TAS has agreed to join in and develop a set of indicators for technical assistance projects.

Marketing Group

TA&D Projects, like many government agencies, must market themselves if they are to continue to serve their customers. One way that we can market ourselves is through networking. Networking must begin internally, with projects communicating freely and easily. Marketing strategies include: continue to develop promising/exemplary practices; develop a needs assessment template; find ways to help develop a media-positive image of education; develop TA&D vignettes that demonstrate collaboration of effective TA&D.

TA&D Projects contribute substantially to special education policy, program, and practice. We must send that message. We must tailor separate messages for Congress, OSEP, SEAs, and LEAs.

Other ideas generated from the meeting of Marketing TA&D Group:

- Should we be a "network?" How do we relate? Audiences? Approach?
- What do we do that's alike? Should RRCs be the core of a marketing effort? The skeleton? How do we relate to each RRC?
- Marketing is presumptuous, dangerous. We should market the importance of TA to federal policymakers, market services to state policymakers.
- To survive, we need to be viewed as viable, effective, useful.
- Deliver our message efficiently. Expose people to elements of marketing.
- To market the need for national TA, we should market a national need rather than content.
- We should market support for existing efforts . . . networking activities, partnerships w/ states, locals. Market a need.
- Antifederalism: market all the work that states, locals must do. We can help.
- Enhancing local ability.
- Market training on demand.
- RRCs are bases; RRCs have access to TA providers.
- Two trends here: 1. There is a call for networking, coordination; 2. We need to market the fact that states have a need that we can fill.
- If the RRCs are responsible for assessment, they should report to OSEP based on real research data. This report could determine content of marketing.
- Political context: less federal control. We're relevant because states are more responsible and need help.
- We talk to parents, LEAs . . . we can harness the message that we know best practices!
- Best practices are relevant to people who have need. People are only interested in what's relevant to them. TA should be relevant to the customer.
- Help customers identify the best path.
- Find a phrase to send a message about what this network does.
- "What do people do to help me?" We need to make our utility obvious.
- Go back to what the client needs . . . a needs assessment? Develop a product, a template.
- We overlap in our customers. Should we force one message?

- We have diverse customers . . . to whom do we deliver our message?
- We may send difference messages to clients, Congress. Is Congress the right audience, though? Should we address the people first?
- We need to address OSEP too. Send a message to OSEP.
- Outside expertise is an option.
- State people must illustrate the need for TA, to convince policymakers.
- Evaluation information is not always useful in marketing.
- Market this: Get the states to say: We Need TA.
- Technical laboratories have visibility, as in OERI. We need to raise our visibility.
- It's difficult to know what groups are doing what.
- Turn research into practice: We need to know just what us a hands-on application, how to convey and compare results, and develop an actual practice or method. This is difficult. What makes a practice effective? It's hard to say it succinctly.

Recommendations from the Marketing Group

1. Develop strategies for networking.
2. Decide on sound marketing strategies. Develop a marketing strategy. Develop an identity for the TA&D network to market.
3. Identify and market promising practices.
4. Develop a needs assessment template.
5. Develop vignettes of TA impact, pieces of the network working together to contribute to a result. Demonstrate the network's effectiveness.

Notes on the bold actions (see below) prescribed by the Marketing Group:

- The issues before us are not connected in an obvious way.
- We have tried many of these ideas already.
- Can we capture information, synthesize it sensibly, and send it out in quarterly reports?
- Acknowledge the SIP. Have a group create a rapid response team for SIPs. Recommend to Congress a role for TA&D, defined within SIP. Explain why a TA&D network needs to exist, tied in to the state level.
- Get help: work with a marketing consultant or expert, get information and suggestions.
- Should we hire a marketing firm?
- We're not marketers. But we're trying to market a message.
- Get clearinghouses, others on an SIP task force. People from this meeting should be involved too.
- Focus bold actions on the SIP.
- Put together a workgroup.
- Facilitate communication among network projects.
- Manage information for projects.
- We don't want the identity of a marketer.
- We're in trouble because we don't market.

BOLD ACTIONS

BOLD ACTIONS OF THE TECHNOLOGY GROUP

from the 6th Annual TA&D Conference, January 1996

WHO	WHAT	WHEN
CEC/ERIC	Disseminate to TA&D projects guidelines for developing accessible web pages. See CITA, at http://www.gsa.gov:80/coca/	31 Jan 1996
FRC/MSRRC	Develop a ListServ of OSEP TA&D projects	15 Feb 1996
CEC/ERIC	Create a central source (bookmark collection) of the best education-related sites on the web. Place on FRC server.	15 Feb 1996
All TA&D Projects	Send to CEC/ERIC (BDK@CEC.SPED.ORG) sites identified by TA&D Projects for the above bookmark collection.	7 Feb 1996
Professions Clearinghouse	Develop information about Web search engines. Links to Alta Vista, Infoseek, Lycos, Open Text, Yahoo, and more can be found at http://home.netscape.com/home/internet-search.html	15 Feb 1996
WRRC/GTE	Survey all remaining TA&D Projects to extend the compilation of current activities begun at the 1996 TA&D Conference	1 March 1996
Judy Smith-Davis	Complete and disseminate Alliance 2000 survey of TA&D projects to identify minority-focussed initiatives, products, and need for expertise from underrepresented people	1 June 1996
FRC and TA&D Projects	Plan for technology training and demonstrations at 1997 TA&D Conference, aimed at sophisticated and unsophisticated users. We need to get input from users during the coming year.	1 Sept 1996

QUESTIONS RAISED BY THE TECHNOLOGY GROUP

at the 6th Annual TA&D Conference

WHO WILL ADDRESS	QUESTION	WHEN QUESTION WILL BE ADDRESSED
	How shall we track and evaluate the use of web services offered by TA&D Projects?	
	How shall we evaluate the Projects' use of technology to deliver information?	
	How shall we determine whether it is best to use paper media or electronic media?	
	How do users decide on which information technology to use?	
Isa Joseph, SARRC	How do we serve people who are not online, or who have only basic internet access?	15 March 1996
Isa Joseph, SARRC	How can we assist people who have 286 or 386 computers, and other old equipment? What funding sources are available?	15 March 1996
CSEF	Consider what TA&D Projects can do to develop online dissemination, in light of decreasing federal funds. What information should we disseminate? What technologies should we use?	15 March 1996
Christy Riffle, MSRRC	What can we do to increase online access for SEAs and other users (like PTIs)?	10 March 1996
WRRC	How can we make online information useful for our clients? How can we refer users to the information they need? How can we move technology networks beyond information distribution, and into training and demonstrations?	2 April 1996

BOLD ACTIONS
OF THE IMPACT EVALUATION GROUP
from the 6th Annual TA&D Conference, January 1996

1. Develop a paper/model/framework for TA&D impact evaluation, e.g., using the RRC paper as a starting point.

2. Use the Government Performance and Reporting Act (GPRA) to develop performance indicators for the TA&D part of IDEA.

3. Develop a framework for IDEA Part B "results" evaluation as a basis for our TA&D to SEAs.

4. Outline action steps for how to engage with our constituencies to define/ refine outcomes and impacts at levels one and two (e.g., Congress, general public, an even larger public)

5. Collect and portray information about how our TA&D constituencies are changing regarding services needed and outcomes/impacts expected (e.g., Who are we adding? dropping out? Who is in a different role? Who is acting differently?).

6. Collectively fund and jointly design a third party evaluation to look at the structure, roles and effects of TA&D projects and then use the information for marketing and for internal improvements in operations.

7. Aggregate some key indicators that we already have for the purpose of communication of TA&D outcomes and effects.

8. Develop a picture of how the TA&D projects fit together logically and how they collectively lead to impact.

9. Gather and report (e.g., via PSAs) data about cost-effectiveness of special education and positive stories about the effects of educating students with disabilities.

10. Develop a system for validating promising and exemplary practices that can be disseminated through the TA&D projects.

BOLD ACTIONS OF THE MARKETING GROUP

from the 6th Annual TA&D Conference, January 1996

1. Acknowledge SIPs, form a working group on how TA&D will inform this process and opportunities to have an impact

2. Look at actual needs of SEAs and LEAs without the continued existence of the TA&D Network

3. Strategies for including representation/participation through existing or new types of conference calls

4. Get to the place at which we can decide to bring in marketing experts.

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Evaluation Results
of the 6th Annual TA&D Conference

1996 OSEP TA&D Conference Evaluation

Evaluation Summary

	Superior	Good	Average	Below Average	Poor
Hotel accommodations	26% (7)	41% (11)	12% (3)	8% (2)	0
Catering	37% (10)	37% (10)	30% (8)	0	0
Rooms and Logistics	49% (13)	34% (9)	26% (7)	8% (2)	0
Reception	49% (13)	37% (10)	26% (7)	4% (1)	0
Registration & Exhibits	41% (11)	41% (11)	19% (5)	12% (3)	0
Conference Materials	49% (13)	49% (13)	8% (2)	4% (1)	0
IDEA Panel	12% (3)	56% (15)	26% (7)	4% (1)	4% (1)
Jack Jennings	93% (25)	12% (3)	0	4% (1)	0
Background/Update:1995	8% (2)	71% (19)	41% (11)	8% (2)	0
Improving Results Panel	8% (2)	26% (7)	52% (14)	4% (1)	8% (2)
Marketing	19% (5)	15% (4)	4% (1)	0	0
Impact Evaluation	0	15% (4)	8% (2)	0	0
Technology	4% (1)	30% (8)	0	0	0
Chris Dede	34% (9)	56% (15)	12% (3)	4% (1)	4% (1)
Summary Session	19% (5)	45% (12)	30% (8)	4% (1)	0
Overall Rating	23% (6)	78% (21)	8% (2)	4% (1)	0

1996 OSEP TA&D Conference

Attendee Comments

Kudos and Thanks

- Broad-based planning & input for this year's meeting was appreciated as were materials that were made available. Thanks for opportunities to network with TA&D colleagues.
- Gets better every year - very worthwhile.
- Thank you! Nice job!
- Excellent conference, especially in view of the circumstances. Thank you!
- Internet sessions were good.
- Thanks for considering the less knowledgable user also (Internet) ☺
- The conference was valuable to TA&D people who do real work in support of the states.

On the speakers...

- Larry Irvin is a very helpful and responsive facilitator.
- Barbara Hanft was helpful to keep us on task & extract next steps for action.
- Chris Dede was more inspirational than applicable.
- Lucille Eber is great but it's not really at the state level.

Not so good...

- The only real weakness was the length of the large group seat time on Tuesday - not that you could control that.
- Working with *Connections* was cumbersome.
- Impact Evaluation - the topic was deadly.
- It wasn't good to have exhibits on the first day.
- As a new member here I have felt left out -better transition between conferences.
- Marketing session needed more interactive time.
- There was too much paper.
- The summary session lacked direction. Facilitator seemed unable to get us beyond expressing our beliefs and ideas.
- The second day of evaluation was better than the first.

Suggestions

- General displays are apparently of little interest -how about a new product show or focus on some aspect of projects.
- If we want OSEP people here (and I agree) let's give them a formal role past Tom Hehir.
- Keep on us to be action oriented - that is practical.

1996 OSEP TA&D Conference

Staff Reflections
(to improve the conference in the future)

- Do away with the exhibit session.
- Think of a larger role for OSEP staff.
- Have shorter days.
- Let speakers know ahead of time that we have binders so they will have their material 3-hole punched for inclusion.
- Survey all TA&D projects *beforehand* to see what topics are of interest.
- For audiotaping: have more microphones in the room. Since the tapes only took input from the mikes, we only got speakers and not general participants on tape.
- Never again hold the conference in January.
  Let's think about having the conference outside of the Washington area, in warmer climates.
- Let people know that if they sign up and do not attend, we will bill them for unused food. A lot of FRC money was *wasted* because people signed up for the luncheon and reception and did not show up.

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Index of Conference Presenters

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Educational Resources Information Center (ERIC)

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