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INTRODUCTION

The purpose of this guide is to provide assistance and information to discretionary projects concerning their core function and the four phases of the discretionary project cycle. Discretionary projects have specialized and technical expertise. The core function of these projects is the provision of technical assistance. The underlying feature of the discretionary project cycle is the notion that projects *Select*, *Provide*, *Report*, and *Evaluate* their core function (i.e., the provision of technical assistance). Specifically, discretionary projects *Select* the form of technical assistance they intend to provide, they *Provide* technical assistance to specific recipients, they *Report* information related to the provision of the technical assistance, and they *Evaluate* the effectiveness of the technical assistance. Each phase of the discretionary project cycle depends on the previous phase and informs the subsequent.

The following sections in this guide will provide greater details concerning the following: (1) core function of discretionary projects, (2) the discretionary project cycle, (3) the four quadrants of project accountability, (4) data reporting procedures, and (5) forthcoming developments (i.e., quadrants 2-4, online application system, etc.). The user guide also includes an appendix containing additional information (i.e., project performance and accountability forms, training evaluation questions, etc.).

CORE FUNCTION OF DISCRETIONARY PROJECTS

As stated in the previous section, the core function of discretionary projects is the provision of technical assistance, and it refers to the actions and resources provided by projects to assist or benefit specific recipients. Recipients of technical assistance may be individuals (i.e., children, students, parents, teachers, administrators, other school and district personnel, etc.) or organizations (i.e., schools, school districts, universities, district consortia, etc.). The actions and resources provided by projects are deliverables, service, and training. Figure 1 below illustrates the core function of discretionary projects.

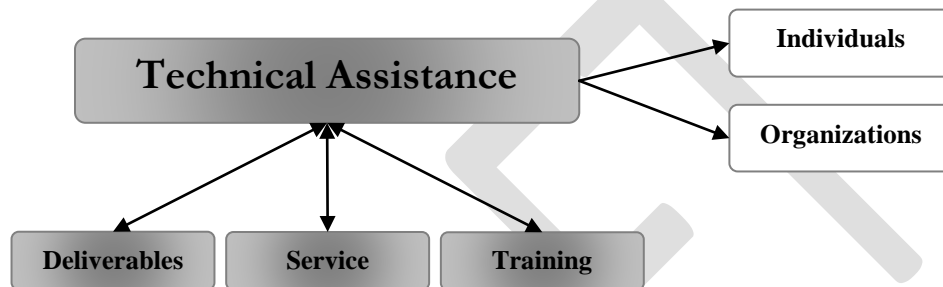


Figure 1. Core function of discretionary projects.

Deliverables

Deliverables are tangible resources, developed or revised by a project for targeted recipients, which provide valuable analysis, information, or instruction to support effective practices, programs, and services. There are three deliverable reporting categories: (1) *Analytical*, (2) *Informational*, and (3) *Instructional*.

An *Analytical* deliverable is a tangible resource where the primary objective is to support the collection, storage, or analysis of information. It may include resources formerly reported as *Data Analysis*, *Database*, *Evaluation Instrument*, *Needs Assessment Report*, and *Survey*. Examples of an *Analytical* deliverable from the 2008-09 fiscal year include the following:

- (1) Child Find Database
- (2) Data Analysis for SPP Indicators

An *Informational* deliverable is a tangible resource where the primary objective is to disseminate information about effective practices, programs, and services. It may include resources formerly reported as *Announcement*, *Book*, *Brochure*, *Calendar*, *Display*, *Exhibit*, *Flyer*, *Handout*, *Audio/Visual Media*, *Newsletter*, *Paper*, *Poster*, *Presentation*, *Report*, and *Website*. Examples of an *Informational* deliverable from the 2008-09 fiscal year include the following:

- (1) Child Find Awareness Brochure
- (2) Project Website

An **Instructional** deliverable is a tangible resource where the primary objective is to provide or support instruction. It may include resources formerly reported as *Course Content Development, Curriculum/Instructional Materials, Manual, and Training Materials*. Examples of an *Instructional* deliverable from the 2008-09 fiscal year include the following:

- (1) Accommodations and Modifications Manual
- (2) Response to Intervention Training Materials

Service

Service is the specific assistance delivered by a project that contributes to the welfare or efficacy of recipients (i.e., individuals or organizations). There are three service reporting categories: (1) *Consultation, Support, and Assistance*, (2) *Screening, Evaluation, and Assessment*, and (3) *State, Regional, or Local Activities*.

Projects provide **Consultation, Support, and Assistance** according to a specific request or based on the identified needs of recipients. This is a very broad form of service that captures several distinct yet common activities. It includes services and training formerly reported as *Provide a Defined Program, Referrals for Other Services, Technical Assistance* (this is a former training reporting category), *Tuition Support at Institutions of Higher Education*, and *Coaching/Mentoring* (only when the primary objective of *Coaching/Mentoring* is to provide consultation, support, and assistance). Examples of *Consultation, Support, and Assistance* from the 2008-09 fiscal year include the following:

- (1) Technical Assistance/Consultation
- (2) Dissemination of Assistive Technology Devices

Screening, Evaluation, and Assessment are processes that include individual child developmental screenings, evaluations, and assessments, and the evaluation or assessment of other individuals, families, and organizations. It includes services formerly reported as *Conduct Developmental Screenings* and *Conduct Student Evaluation/Assessment*. Examples of *Screening, Evaluation, and Assessment* from the 2008-09 fiscal year include the following:

- (1) Developmental Screenings
- (2) Functional Behavior Assessment

State, Regional, and Local Activities refers to the facilitation or participation in state, regional, or local activities, meetings, workgroups, and other collaborative efforts with the intended purpose of disseminating information, coordinating project services and activities, or sharing expertise. Projects must explicitly indicate either **facilitation** or **participation**. Facilitation represents the leadership role the project plays in the activity (such as organizing, chairing, and disseminating information concerning the activity). On the other hand, participation refers to the project's role as an active and supportive contributor within the activity (such as attending activities, completing assignments, etc.). Projects should not report internal project meetings that exclude state, regional, or local stakeholders (such as staff meetings). Note that *State, Regional, and Local Activities* include services formerly reported as *Facilitate Interagency Collaboration* and *Facilitate Statewide Leadership Activities*. Examples of *State, Regional, and Local Activities* from the 2008-09 fiscal year include the following:

- (1) Participation in the State Personnel Development Alliance Committee
- (2) Facilitation of Statewide Response to Intervention Working Group

Training

Training is an activity implemented by a project (via single or multiple delivery strategies) to provide awareness, knowledge, or skills that meet the common needs of single or multiple recipients and supports effective practices, programs, and services. There are three training reporting categories: (1) *Facilitation of a Training Event*, (2) *Presentation at a Training Event*, and (3) *Provision of Training*.

Facilitation of a Training Event is the facilitation of a formal event (such as a conference) where individuals and groups gather to either share or observe presentations that support effective practices, programs, and services. Facilitation specifically refers to the project's effort to plan, organize, coordinate, and assume the general responsibility for the implementation of the training event. Note that this does not refer to the delivery of training content to a specific audience by individuals within a training event. Examples of *Facilitation of a Training Event* from the 2008-09 fiscal year include the following:

- (1) Positive Behavior Support Conference
- (2) Family Café Conference

Presentation at a Training Event is a presentation given to an audience with the intention of disseminating information to promote awareness concerning effective practices, programs, and services. In contrast to facilitation, presentation specifically represents the delivery of training content to a specific audience by individuals within a training event. Examples of *Presentation at a Training Event* from the 2008-09 fiscal year include the following:

- (1) Presentation at Administrators' Management Meeting
- (2) Presentation at 64th Annual FCEC Conference

Projects provide training (i.e., *Provision of Training*) in order for single or multiple recipients to gain, strengthen, or maintain competencies that support effective practices, programs, and services. *Provision of Training* is not the equivalent to *Presentation at a Training Event*. The critical distinction between the two training reporting categories is the notion that multiple related and unrelated presentations (i.e., *Presentation at a Training Event*) may occur within a single training event where the presenter and the facilitator typically do not share the same affiliation (an example is a conference consisting of several presentations from multiple projects). On the other hand, *Provision of Training* is a single training event where the facilitators and the presenters typically share the same affiliation (an example is a training workshop provided by a single or collaborating projects). *Provision of Training* includes trainings formerly reported as *Coursework at Institutions of Higher Education*, *Conducting a Workshop/Training*, and *Coaching/Mentoring* (only when the primary objective of *Coaching/Mentoring* is to provide training). Examples of *Provision of Training* from the 2008-09 fiscal year include the following:

- (1) Differentiated Instruction Training Workshop
- (2) Response to Intervention Coaching/Mentoring

In summary, this section discussed technical assistance as the core function of discretionary projects. Furthermore, it provided a definition for deliverables, service, and training, and their respective components. These components represent the specific performance items discretionary projects identify in their application, provide to recipients, report to the Project Tracking System (PTS), and evaluate (all as part of the discretionary project cycle). Appendix A contains the Project Performance and Accountability (PPA) forms which nicely detail each deliverable, service, and training in the context of the project application and the PTS.

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DISCRETIONARY PROJECT CYCLE

As mentioned in the first section, the discretionary project cycle represents the process whereby projects address their core function (i.e., the provision of technical assistance). It consists of four phases: *Select*, *Provide*, *Report*, and *Evaluate*. Furthermore, each phase of the discretionary project cycle depends on the previous phase and informs the subsequent. Figure 2 below illustrates the discretionary project cycle.

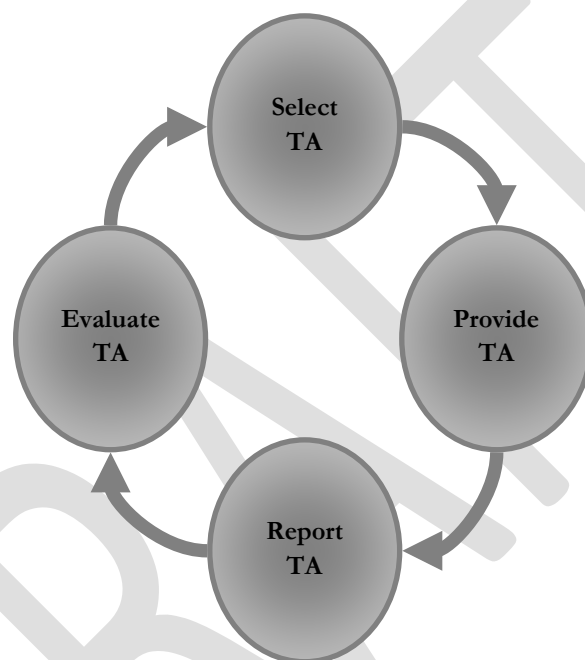


Figure 2. Discretionary project cycle.

Phase 1: Select

The first phase of the discretionary project cycle is *Select*, and it refers to the process where projects select “what” they provide, “who” receives it, and “how” and “where” they provide it. It is imperative that the selection of technical assistance by discretionary projects is consistent with the needs and objectives of the Florida Department of Education (FLDOE), and, if applicable, the needs and objectives of the local education agencies (LEAs). The Bureau of Exceptional Education and Student Services (BEESS) informs discretionary projects of the needs and objectives of FLDOE within the Request for Application (RFA). Furthermore, if necessary and available, the selection process may also depend on the results from the evaluation of the technical assistance provided by the project during the preceding year. Finally, discretionary projects detail the selection process in the project narrative within their application by using baseline data, identifying an established need, and describing their support for the State Performance Plan.

Phase 2: Provide

The second phase is *Provide* which is the direct provision of technical assistance by discretionary projects to specific and targeted recipients. Recipients of technical assistance may be individuals (i.e., children, students, parents, teachers, administrators, other school and district personnel, etc.) or organizations (i.e., schools, school districts, universities, district consortia, etc.). This phase represents the application of the discretionary project's specialized and technical expertise, and is where the greatest impact on recipients occurs.

Phase 3: Report

Report is the third phase and it refers to the process where discretionary projects document descriptive, status, and performance information to the PTS at pts.florida-ese.org. The PTS has three key objectives: (1) capture and store descriptive, status, and performance information related to the technical assistance provided by discretionary projects, (2) provide unduplicated data for the purpose of evaluating the effectiveness of technical assistance, and (3) provide relevant data as requested by discretionary projects to meet their needs and the needs of their respective partners and constituents. BEESS views all information reported by discretionary projects to the PTS as important; however, some information has a greater priority depending on the specific objective.

Phase 4: Evaluate

The fourth and final phase of the discretionary project cycle is *Evaluation* where discretionary projects, and other partners (i.e., independent third party, LEA(s), BEESS, etc.), use the information reported to the PTS and/or other relevant data (both qualitative and quantitative) to evaluate the effectiveness of the technical assistance and establish a basis to identify subsequent need and the future provision of technical assistance. Discretionary projects detail an evaluation plan in the project narrative within their application. BEESS will use the information reported to the PTS and the framework provided by the four quadrants of project accountability to evaluate an aggregate of discretionary projects. The intention of the evaluation of aggregate data is to examine the statewide impact and the rate of return of the technical assistance provided by discretionary projects. Moreover, BEESS will use the information reported to the PTS to support the State Performance Plan, identify state-level needs and relevant actions, and address requests from FLDOE and the state legislature.

In summary, this section described project involvement in the four phases of the discretionary project cycle (i.e., *Select, Provide, Report, and Evaluation*) in the context of their core function.

FOUR QUADRANTS OF PROJECT ACCOUNTABILITY

The four quadrants of project accountability are the framework BEESS uses to generally examine the impact of the technical assistance provided by discretionary projects. Specifically, BEESS will aggregate data from the PTS and use the framework to accomplish the following:

- (1) Support the State Performance Plan.
- (2) Identify statewide needs and relevant actions.
- (3) Address requests from the FLDOE and the state legislature.
- (4) Examine the statewide impact and the rate of return of technical assistance.

The figure below illustrates the four quadrants of project accountability and includes an example for each quadrant common to most discretionary projects.

	Quantity	Quality
Effort	1 Example: 90 teachers receive training from the discretionary project.	2 Example: 70% of the teachers indicate that the training increased their knowledge.
Effect	3 Example: 57 teachers indicate that they implement what they learned from the training.	4 Example: 60% of students demonstrate progress as reported by the trained teachers.

Quadrant 1

The first quadrant addresses the discretionary project's quantity of effort (i.e., how much technical assistance does the project provide?). In the context of discretionary projects, quadrant 1 considers the number of individuals or organizations that receive technical assistance. The figure above provides an example of the quadrant 1 common to many discretionary projects: 90 teachers receive training from the discretionary project. Currently, discretionary projects report quadrant 1 information to the PTS for each deliverable, service, and training.

Quadrant 2

The second quadrant refers to the quality of the discretionary project's effort (i.e., how well did the project provide technical assistance?). The primary concern of quadrant 2 is the quality of the

provision of technical assistance as measured by the satisfaction of the recipients. An example common to several discretionary projects is found in the figure above: 70% of the teachers indicate that the training increased their knowledge. Currently, discretionary projects only report quadrant 2 information to the PTS via the evaluation questions for training. However, BEESS anticipates implementing evaluation questions for select deliverables and services by July 1, 2010. Evaluation questions for training in both English and Spanish are found in Appendix B.

Quadrant 3

The third quadrant addresses the discretionary project's quantity of effect (i.e., how many recipients implemented the technical assistance provided by the project?). The goal of quadrant 3 is to calculate the number of recipients that regularly apply or implement the technical assistance provided by the project. However, this may not be applicable for specific forms of deliverables or service. Nonetheless, the quantity of effect is important for the purpose of capturing the usability of the technical assistance prior to examining the effect on student outcomes (i.e., academic, behavioral, etc.). An example that may be common to many discretionary projects is found in the figure above: 57 teachers indicate that they implement what they learned from the training. Currently, discretionary projects do not report quadrant 3 information to the PTS. BEESS will pilot quadrant 3 with select discretionary projects during the 2010-11 fiscal year.

Quadrant 4

The fourth and final quadrant refers to the quality of the discretionary project's effect (i.e., what impact did the technical assistance provided by the project have?). The primary intention of quadrant 4 is to capture the effect of the technical assistance on children or students although it may not be entirely applicable for several forms of deliverables or service. An example that may be common to many discretionary projects is found in the figure above: 60% of students demonstrate progress as reported by the trained teachers. Similar to quadrant 3, discretionary project currently do not report information to the PTS related to quadrant 4. Moreover, BEESS will pilot quadrant 4 with select discretionary projects during the 2010-11 fiscal year.

This section discussed the four quadrants of project accountability. Specifically, it provided a detailed description, definition, and examples of each quadrant.

DATA REPORTING PROCEDURES

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FORTHCOMING DEVELOPMENTS

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APPENDIX A

Performance Item

Deliverable – A tangible resource developed or revised by a project for targeted recipients that provides valuable analysis, information, or instruction to support effective practices, programs, and services.

Type of Deliverable and Brief Description		
<p>Applicants will select a deliverable type (listed below) and provide the name and a brief description that includes the content to be covered. Applicants will also identify the topic area(s), intended audience, and the anticipated due date. Below are examples of each type of deliverable:</p> <ul style="list-style-type: none"> • Analytical (this may include data analysis, database, evaluation instrument, needs assessment, survey, etc.) • Informational (this may include announcement, book, brochure, calendar, display, exhibit, flyer, handout, audio/visual media (podcast, video, etc.), newsletter, paper, poster, presentation, report, website, etc.) • Instructional (this may include course content development, curriculum/instructional materials, manual, training materials, etc.) 		
Topic Areas	Intended Audience	Due Date
<p>Applicants will select one or more of the following topic areas that are relevant to the deliverable.</p> <ul style="list-style-type: none"> • Accessible Instructional Materials • Assessment • Assistive Technology • Behavior/Classroom Management • Child Development • Child Find • Curriculum • Diversity/Disability Awareness • ESE Policy/Procedures • Instructional Technology • Instructional /Teaching Strategies • Parent/Family Support • Personnel Preparation • Secondary Transition • Student Support Services • Transition from Part C to Part B • Transition IEP 	<p>Applicants will identify the intended audience for the deliverables.</p>	<p>Applicants will provide the anticipated completion date for each deliverable.</p>

Performance Item

Deliverable – A tangible resource developed or revised by a project for targeted recipients that provides valuable analysis, information, or instruction to support effective practices, programs, and services.

Type of Deliverable and Brief Description		
List the type of deliverable and provide the name and a brief description that includes the content to be covered. Also, identify the topic area(s), intended audience, and the anticipated due date in the spaces provided below.		
Topic Areas	Intended Audience	Due Date
Type of Deliverable and Brief Description		
List the type of deliverable and provide the name and a brief description that includes the content to be covered. Also, identify the topic area(s), intended audience, and the anticipated due date in the spaces provided below.		
Topic Areas	Intended Audience	Due Date
Type of Deliverable and Brief Description		
List the type of deliverable and provide the name and a brief description that includes the content to be covered. Also, identify the topic area(s), intended audience, and the anticipated due date in the spaces provided below.		
Topic Areas	Intended Audience	Due Date

Performance Item

Training – An activity implemented by a project (via single or multiple delivery strategies) to provide awareness, knowledge, or skills that meet the common needs of single or multiple recipients and supports effective practices, programs, and services.

Type of Training and Brief Description			
<p>Applicants will select a type of training (listed below) and provide the name and a brief description that includes the content to be covered. Applicants will also identify the topic area(s), method(s) of delivery, intended audience, and, if applicable, the estimated number of implementations.</p> <ul style="list-style-type: none"> • Facilitation of a Training Event • Presentation at a Training Event • Provision of Training (this includes the following former performance items – Conducting a Workshop/Training, Coursework at Institutions of Higher Education, and Coaching/Mentoring) 			
Topic Areas	Method of Delivery	Intended Audience	Estimated Number of Implementations
<p>Applicants will select one or more of the following topic areas that are relevant to the type of training.</p> <ul style="list-style-type: none"> • Accessible Instructional Materials • Assessment • Assistive Technology • Behavior/Classroom Management • Child Development • Child Find • Curriculum • Diversity/Disability Awareness • ESE Policy/Procedures • Instructional Technology • Instructional /Teaching Strategies • Parent/Family Support • Personnel Preparation • Secondary Transition • Student Support Services • Transition from Part C to Part B • Transition IEP 	<p>Applicants will select one or more methods of delivery that are relevant to the type of training.</p> <ul style="list-style-type: none"> • Communities of Practice • Face-to-Face • Online Instruction • Teleconference • Video Conference 	<p>Applicants will identify the intended audience for all types of training.</p>	<p>Applicants will indicate the estimated number of implementations for each training.</p>

Performance Item

Training – An activity implemented by a project (via single or multiple delivery strategies) to provide awareness, knowledge, or skills that meet the common needs of single or multiple recipients and supports effective practices, programs, and services.

Type of Training and Brief Description			
List the type of training and provide the name and a brief description that includes the content to be covered. Also identify the topic area(s), method(s) of delivery, intended audience, and, if applicable, the estimated number of implementations.			
Topic Areas	Method of Delivery	Intended Audience	Estimated Number of Implementations
Type of Training and Brief Description			
List the type of training and provide the name and a brief description that includes the content to be covered. Also identify the topic area(s), method(s) of delivery, intended audience, and, if applicable, the estimated number of implementations.			
Topic Areas	Method of Delivery	Intended Audience	Estimated Number of Implementations
Type of Training and Brief Description			
List the type of training and provide the name and a brief description that includes the content to be covered. Also identify the topic area(s), method(s) of delivery, intended audience, and, if applicable, the estimated number of implementations.			
Topic Areas	Method of Delivery	Intended Audience	Estimated Number of Implementations

Performance Item

Service Delivery - Specific assistance delivered by a project that contributes to the welfare or efficacy of recipients (i.e., individuals or organizations).

Type of Service and Brief Description		
<p>Applicants will select a type of service (listed below) and provide the name and a brief description that includes information about the nature of the service to be delivered. Applicants will also identify the topic area(s), targeted participants, and estimated number of implementations.</p> <ul style="list-style-type: none"> • Consultation, Support, Assistance (this includes the following former performance items – Provide a Defined Program, Referrals for Other Services, Technical Assistance, Tuition Support at Institutions of Higher Education, and Coaching/Mentoring) • Screening, Evaluation, and Assessment (this includes the following former performance items – Conduct Developmental Screenings and Conduct Student Evaluation/Assessment) • State, Regional, or Local Activities (Facilitation or Participation) (this includes the following former performance items – Facilitate Interagency Collaboration and Facilitate Statewide Leadership Activities) 		
Topic Areas	Targeted Participants	Estimated Number of Implementations
<p>Applicants will select one or more of the following topic areas that are relevant to the type of service.</p> <ul style="list-style-type: none"> • Accessible Instructional Materials • Assessment • Assistive Technology • Behavior/Classroom Management • Child Development • Child Find • Curriculum • Diversity/Disability Awareness • ESE Policy/Procedures • Instructional Technology • Instructional /Teaching Strategies • Parent/Family Support • Personnel Preparation • Secondary Transition • Student Support Services • Transition from Part C to Part B • Transition IEP 	<p>Applicants will identify the targeted participants for service delivery.</p>	<p>Applicants will indicate the estimated number of implementations for each service.</p>

Performance Item

Service Delivery - Specific assistance delivered by a project that contributes to the welfare or efficacy of recipients (i.e., individuals or organizations).

Type of Service and Brief Description		
List the type of service and provide the name and a brief description that includes information about the nature of the service to be delivered. Also, identify the topic area(s), targeted participants, and the estimated number of implementations.		
Topic Areas	Targeted Participants	Estimated Number of Implementations
Type of Service and Brief Description		
List the type of service and provide the name and a brief description that includes information about the nature of the service to be delivered. Also, identify the topic area(s), targeted participants, and the estimated number of implementations.		
Topic Areas	Targeted Participants	Estimated Number of Implementations
Type of Service and Brief Description		
List the type of service and provide the name and a brief description that includes information about the nature of the service to be delivered. Also, identify the topic area(s), targeted participants, and the estimated number of implementations.		
Topic Areas	Targeted Participants	Estimated Number of Implementations

APPENDIX B

Evaluation questions for training (English)

To what extent:	1 = Not at All				6 = Greatly	
did the training increase your knowledge?	1	2	3	4	5	6
did the training meet its intended objectives?	1	2	3	4	5	6

To what extent:	1 = Never				6 = Always	
will you use what you learned from the training?	1	2	3	4	5	6
will you recommend the training to others?	1	2	3	4	5	6

Evaluation questions for training (Spanish)

En que medida:	1 = No en Absoluto				6 = Mucho	
el entrenamiento aumento su conocimiento?	1	2	3	4	5	6
el entrenamiento cumplio con sus objetivos previstos?	1	2	3	4	5	6

En que medida:	1 = Nunca				6 = Siempre	
usarias lo que aprendiste el entrenamiento?	1	2	3	4	5	6
lo recomendaria este entrenamiento a los demas?	1	2	3	4	5	6