

Transcript - Detailed Project Plan (DDP) and Professional Development Plan (PD Plan)

BETH PONDER

Welcome to Detailed Project Plan and Professional Development Plan webinar. My name is Beth Ponder. I am your host today. I am the Professional Development Director at TCALL, and I will be helping present with Elena Madrid, who is our TWC AEL TA supervisor.

ELENA MADRID

Thank you and good morning. And thank you, Beth and Wendy, for supporting this effort to get this information out. So again, this is a Detailed Project Plan and Professional Development Plan webinar, so we will be talking about these two documents. We did encourage for directors, poly assurance, program accountability, and PD coordinators to be on this webinar because information presented here is all related to things that you will be doing for your programs.

OK, agenda for today, pretty basic. What these documents are, so the detailed project plan, and also the PD plan, and also the follow-up to the PD plan. So a brief explanation of what these documents are, why the change. So this whole webinar is talking about changes that have been made to these documents, some changes in the timeline for when they will be due. So we want you to get that information well in advance before these changes are implemented.

So we'll look at the document changes specifically for these two things, the PD plan of the detailed project plan. And again, if you have questions, put them in the chat. And then we'll end with a timeline showing both of these documents on the timeline for these three years. So the end of this year, because we're getting close to it, next year which will be the sixth year for this grant. There's an extension year. And then finally, we will have the timeline for the new year, for the new RFA, and what to expect for these documents.

OK, so objectives, we want you to understand how organizational goals and PD can be better aligned. That's one of the reasons why we've had some changes to these documents, to better align them so that it really makes sense in terms of doing the PD plan, and seeing how that fits in with organizational goals, and vice versa ensuring that on the detailed project plan you are

mentioning the PD that you'll be using to meet your goals. So they will be working more in tandem, and hopefully you'll be able to see that as we're presenting this information today.

The other thing is, be able to use detailed project plan and PD plan as tools for goal achievement. So I think the PD plan was really doing that in terms of achieving goals, and do we do the PD that we were intending to do. Was it for the reason why we wanted to do that PD? But the detailed project plan definitely could use some work. It's been more of a deliverable, traditional in the check-the-box type of deliverable.

So basically, you have information on there. There's a couple of questions. And you submitted back to us. But in all honesty, there could have been some work to it where it really helped with goal setting and planning. So that's what we looked at in modifying this document.

Next, we want to encourage initiating planning for the new program year. I know most of the programs do very well in planning before the new program year starts. So going into the new program year you're already set with things that you want to accomplish, how you want to accomplish them. So we hope that these documents will help to support that. And for those of you who are still working on the goal setting, and sometimes you may not go in with a solid plan into the new year, we hope that these documents will help you to better align with that, help you to better achieve those things.

OK, so the first thing I want to do is take a look at what it looks like when we're working in silos. So the image to the left may be what you're experiencing to some extent in your own organization. Maybe there's a team for different areas of operation. But none of these teams are communicating effectively together or working collaboratively. Maybe your administrators, including leadership, director, supervisors, or coordinators have an idea of what the different teams may be doing. But the individual and siloed teams are not aware of what is going on with each other.

So more significantly, they may not understand or realize how their actions may be impacting other teams or the organization as a whole. You may be duplicating efforts, or you might think, OK, well that team is handling it. So we're not going to deal with it. Or even at an individual level, well, my team member was going to pick that up. But they never did it because communication isn't clear. There's just assumptions. There's a lot of time being wasted, a lot of effort being wasted.

So I think the cartoon on the right gives a little bit of insight our siloed mentality may be getting out of hand. And you may not even realize that you have a siloed mentality. Because if you've been working in a way for so long, you're just used to that. You're not used to working on a team. It's not that you don't want to work on a team. But you just make a lot of assumptions

and you think that things are going well, when it's really not happening. And yeah, you may not feel like you're part of a team.

So we're looking at this picture of the diagram. The donkeys, I'm sorry, they finally got it together. So now, I'd like you to look at the picture on the left, thinking about working collaboratively in your organization, and everyone understanding how they are in contribution to your organization's goals. They understand how all the pieces come together. And they are intensely doing their part to support each other, and be part of helping students through their pathways, and navigating your services.

So there's a big difference. So when we're sometimes working towards our individual efforts, we're very focused on our goal. We're very focused on getting things done. But we may not necessarily understand how we're impacting our team. We may also have goals that are very similar, and we're duplicating efforts, as some people have put in the chat. But when everybody understands the goal and everybody is working on the same plan, it's much easier to get things accomplished. The workload is shared. Everybody can see the larger vision, and everything is a contribution to moving forward, and not horizontally.

OK. So let's talk a little bit about what these documents are. At a very basic level, these documents are deliverables. So what does that mean? For people who are not familiar with the grant requirements or the deliverables that are submitted, these things are written into the grant. So they are required to be submitted. The PD plan follow-up though was an ad hoc doc. But this will become a deliverable starting July 2024.

It was still required to be submitted. But it wasn't treated in the same way as these other documents. So if it was submitted, we did upload it to our database where we keep these deliverables. But now it's officially going to be made an official deliverable.

OK. So next, what are these documents used for? So the detailed project plan was used for reporting on grant performance. So those of you who are familiar with this document, it's in an Excel spreadsheet. Basically, there's a bunch of different tabs. There's a lot of information that gets put on there, a lot of it is really information that we already provide to you. So we give you a monthly report card with information on your spending, information on your targets, and that just gets put back into this detailed project plan.

The PD plan, it's used for implementation of PD with a systematic framework. And then the PD follow-up plan is a review of the PD plan midyear for completions, and revisions, and PD still needed. So the PD plan, again, I think was a little bit better in terms of the goal setting. So there was a check-in midyear to see how are things going. Are there improvements? Do we need to make corrections?

And then also looking at planning the PD for the new program year. What have we accomplished? What do we still need to add? What are areas that we want to have for improvement? The detailed project plan really didn't do that. There wasn't really a check-in. There's quarterly narratives to give us updates. But there wasn't a whole lot when it came to actually goal setting and goal planning.

So this diagram here shows an example of how operations may be split up for an organization, or where time and effort may be going for your organization. So I want you to remember this is only an example for the purposes of this presentation. We are not saying this is how operations should be split up, or that this is everything that is included in operations. For this example, we can see how much time and effort may be distributed to certain areas I think which are pretty common to most organizations-- intake orientation, instruction, career navigation, testing, workforce prep, data entry.

But you could see the majority of the time and effort goes to instruction, because this is where the majority of the time goes with the students. So a lot of these other areas are touched upon with student activity, like intake and orientation, and definitely everybody goes through that process. Some may get career navigation. Others may not, or it might be a very limited form of career navigation, depending on what your resources are in terms of staff.

Some people get tested. Not everybody gets tested. So you can see. But everybody gets instruction. Everybody gets direct hours. Sometimes they get proxy hours. Sometimes they get training hours.

So in looking at this diagram, the PD plan before these changes really focused on instruction, right? Because it was a requirement. And that's a lot of what we had to offer in terms of PD. The detailed project plan really should be looking at all these things as a whole. It should be looking at things collectively. What do you want to accomplish for the organization in terms of improvement, in terms of what your plans are for the new year, things like that?

And so that should include the PD. So as PD is expanding, so now we have the career pathways development PD center, we have the distance education PD center, there are more opportunities to have PD for different areas. So for example, now since these PD centers have been added, we can have professional development in areas of operations including data entry, distance or remote education, ITs, ITPs, corrections. And these are just a few things.

So, definitely planning on continuing to expand the options for PD, so those things will now be able to be included in the PD plan. So as you're looking at your detailed project plan and determining what are the goals for the organization, then determining, OK, what PD is available that we can connect with that. And make sure that's on the PD plan, but also making sure it's reflected and mentioned on the detailed project plan.

So you really should be determining what your organizational goals are, and then determining, OK, what supports we do we need to accomplish what's on that project plan, which would include PD.

So why the change? One of the main reasons for the changes presented today is to align the detailed project plan, and the PD plan so that the PD plan supports identified organizational goals found in the detailed project plan. Adjustments of the documents, especially the detailed project plan, make it more robust and user friendly. No longer will these documents be just check the box, as I mentioned, check-the-box deliverables, but tools that can be used for achieving goals.

Also, these changes are meant to align with the new way of working for the AEL technical assistance team. We will have a whole webinar that we'll talk about the new way of working on May 11. So I recommend that you register for this. Please don't get it confused with past webinars. Because it'll say that you can no longer register, which was happening for some people for this webinar. But basically, we're going to be going over the changes that will be presented for the TA team.

So we will be introducing new tools and webinars, going over desk gates, regional assignments, and the new director training. So regional assignments, I'm not going to talk about it a lot. But just know that we're leaning towards this. This is what we'd like to do because we're such a small team and we want to have a greater reach, and it's really difficult when we're running all over the state in different areas.

There will be a little something for everyone. So it would be beneficial for your core members to attend. And when I say core members, I mean the grant required positions, so you have your instruction lead, you have your career navigator, you have your QA PA, you have your director. All of those required positions.

The program specialists have already started the changes by shifting to quarterly meetings with providers. And we are relying more and more on the deliverables to prepare for these meetings. So this will talk a little bit about these changes that will come starting July 1st, and how all of this stuff that we've been kind of starting to introduce to you. Is part of that. It stems from those decisions and the changes that we've made for providing technical assistance.

So the purpose of the detailed budget plan, so we're going into a little bit more detail on these different documents. So as mentioned before, we are shifting from just check-the-box deliverables to tools that can be used for program review and improvement. The new detailed product plan can be used for goal setting and to achieve organizational goals, as well as improved communication with TWC, the program specialists, and the grant managers.

So again, as we're shifting to quarterly meetings with providers, we're relying more and more on the deliverables that you share with us to be better informed on what's going on with your programs before we meet with you. That way we're not coming into the conversations cold. We're not asking you questions you've probably already answered on these deliverables. And we can get a lot more accomplished in the time that we spend with you in those quarterly meetings.

So I wanted to do a side-by-side comparison of what to expect with the changes. They're actually pretty significant for the detailed project plan. So in this current detailed project plan which you will use till the end of this program year, so this new document that I'll be sharing with you is not going to be available until June 1st, I believe. But we want to give you a heads up. We want to help start working you into the transition so you're not caught off guard, and you're getting this information in advance.

So the current detailed project plan is an Excel document. It has a bunch of tabs, as I had shared. The targets are on there. Expenses are on there. It's focused on compliance. Again, check the box. There's four quarterly reports. And there's a final report at the end of the year. So that's what you're currently using. The way that it's updated, you'll now have a fillable PDF form. You'll receive the template earlier for planning. There's not going to be any targets and no expenses on there.

And you'll see right now, when I share the actual document with you. Now why we took those out is mainly because you're getting that information already on your report card. So usually what happens is you wait for the report card, and then you just take those numbers and you plug them back into this document, and then you send it back to us. And we're like, well, that doesn't really make sense. So we took that out. We took that part out.

The document is more focused on planning. It will be reviewed by the program specialists and the contract specialists. You'll now have three quarterly narratives and one comprehensive final report, which includes the fourth quarter updates. So that we combined, so you're not having to choose to individual reports.

So this is the timeline for these changes, for the detailed project plan. June 1 the template will be available. June 30 is tentatively an early submission, if you would like to take advantage of that. Why we put that in is because we would really love to see your goals before we go into the new program year. It was really difficult before with the current document, because we were waiting on targets. We were waiting on spending and budgets, which we didn't get until the program year started.

But now that we took all of that stuff out, you should be able to provide to us what your plans are, and hopefully you're already doing planning, and it's as simple as putting that onto the

document. So we'll take them as early as June 30. The official date stays the same for this year, August 30, at the end of August. That's when the detailed project plan for this current program year will be due.

And then is that the right date? I think so. We might have a wrong date. So again, three quarterly narratives with monitoring reports are due last day of the month after the end of the first three quarters. And then the comprehensive report will be due August 31, 2024. So this is for the new document. This is not the current document.

So this is what it's going to look like. You're going to get a fillable form. What's really great is that you're going to have a table of contents. That will help you to easily navigate the document. Again, the area to include targets and spending was removed, since this is already provided to you on the monthly report cards. Waiting on this information was one of the main reasons why the document had such a delayed due date for the new program year.

We kept the due date the same for the coming year with the understanding that this is a new change, and we want to gradually introduce it. Also, we are well aware of how hectic the end of year can be with closing out, as we're going to submit the documents. So on your table of contents, you're going to see the areas that need to be completed. The first part is a detailed project plan.

That is the first part that needs to be due by August 30 in the new program year. And then you have your quarterly reports and then a final comprehensive report, all included in the same template.

So when you're completing the first part of it, and this part is actually considered the detailed project plan. It's what happens to let us know what you're planning to do for the program year. We're focused on goals. We're focused on SMART goals here. We're asking you to give us the goal, your benchmarks, how you plan to achieve it, what your deadlines are for those things. And then also the staff that might be leading that goal or supporting staff for this goal.

So putting in a little bit of accountability on your side of the team or your side of organization, who is going to be responsible to make sure that these things are completed? The one thing that we really want to emphasize is including, again, the PD to reach these goals. So basically, as you're developing this and you know your goals, you should be connecting what PD is going to be happening for your organization. These conversations really should be happening between the PD coordinator and whoever is doing planning for the organization, whether it's the director or other members of the team.

That conversation should be happening. It's really should it be the PD coordinator on their own determining what PD should be happening. It should be in alignment with what you're trying to achieve for the organization.

The one thing that stayed the same for this document is grant specific implementation requirements. This stays the same every year only because it is grant required, questions like implementing comprehensive assessment, asking when do you want to complete it, any comments. So that stuff will stay the same.

Going into the quarterly report, you can see there's a number of questions that we ask. The questions will change depending on the period of time that we are in the program. So we definitely want to be asking you quarter three questions that are the same as what we asked you in quarter one, because things change throughout the year. We really want updates on the goals that you said you were going to accomplish. How did things go? What were obstacles that challenged you? How did you overcome those challenges or not?

So questions are going to change. So it's really important that you read them. Because we don't want to just write a narrative, and not looking at what's being asked. We also encourage you to add more information beyond what's being asked of you. If there's something you feel like you really need to communicate, we really want you to put that on there. Because again, it's going to be reviewed before we meet with you in our quarterly meetings.

For the quarterly monitoring reports, we need you to list who your subrecipients and partners are. But we would please love for you to tell us who the subrecipients are, or whether they're subrecipients or partners. Because there is a difference. And just make a note of that for us, because it just helps us to better understand what your relationships are, or what you're doing with the grant. And then there's some instructions for completing the monitoring reports.

And then again at the end, you'll have a comprehensive final report. There will be some questions related two quarter four. But there's also questions in how, for example, was the total enrollment met for the year, or was the budget fully expended for the year. So again, we took out all of the budget and the numbers that you have to plug in. But there are still some questions related to those activities.

All right, so next we're going to be moving on to the PD plan, and I'm going to go ahead and let Beth take over.

BETH PONDER

All right. Thank you, Elena. All right, so as Elena said, part of the work that we've been doing is to align these documents. So the purpose of the PD plan is to support the goals of the program, to plan professional development that helps increase the competence of the instructors and the other staff in your programs. And then have that contribute to your program success with MSGs as well as other deliverables.

So we want to talk about the PD recommendations. So if you go to the next slide, thank you. So just those of you that are PD coordinators are very familiar with this process. But some of you who are not may not be so. The professional development specialists at TCALL collaborate with the PD coordinators at the local program to create PD recommendations for your program.

And it says starting in May, we're currently working on that now, already working on PD recommendations. And those are based on data analysis, your program goals which we hope were going to be SMART goals. Input from your program, we seek input from the TWC program support specialists that are assigned to each program, the statewide PD needs assessment, as well this year with input from the distance education and career pathways professional development centers.

And when we talk about data analysis, we are looking at lots of different pieces of data. We're looking at teams data. We're looking at your POP report. We're looking at the MSG report. So they really do a deep dive into the data. And the PD specialists will reach out for meeting times. So they are currently setting those up with PD coordinators, as they're working on the recommendations for this year. Next slide?

All right so once the recommendations are delivered to the program, the program's PD team can start working on filling out the PD plan. And the PD specialist is always there to help, as needed. And we're going to look at the template here in just a minute.

But what happens then is in January and February, the PD specialists will work with the PD coordinators to complete what we call the PD follow-up plan. And that's used to evaluate where you are in the middle of the year, and see what you still have in progress, but also plan for what do we want to get accomplished professional development wise between now and the end of the program year.

So now we want to look at our timeline for the PD plan. So by June 1, the revised PD plan template will be sent to the programs from TWC. And that is we're working on our adjustments right now to the PD plan. So it shall be out shortly. By June 1, PD recommendations from the TCALL team will be sent to all programs. By June 30, 2023, the PD plan will be due to TWC contracts. And that is a deliverable that will be due on June 30.

And then February 15 is when we will do the PD follow-up plan. And again, that's going to be delivered to TWC contracts. Your PD specialists will help you with that. But again, that midyear snapshot of where you are with your professional development plan.

So we want to look at what are a few of the changes that we've made to the current plan and the updated plan. And the current plan really didn't have specific goals or examples for you of those goals. And there was a section called Identifying resources that we're going to take out.

So the updated plan also includes a section now on who are the team members that are helping with the plan. We really want to move away from just one person on your staff who's responsible for the PD plan, but that you have a team that's helping make that plan. Again, SMART goal focused, and aligned with the detailed project plan. We've got some clear examples of goals and activities. And then we removed phase 4.

So we're going to take a look at what it looks like. And for those of you that are familiar with this form, the form itself does not look that much different. But we've added some language, again, helping to align to the DPP, supports and in alignment with the organization's overarching goals and objectives as identified in the detailed project plan. So you'll see some of that wording change.

Then on the next slide, we'll see that we've added the section there for your team. This is the section where we want you to name your program's PD team, and who is the team that is working on this. And then one other little piece that we wanted to mention that we've highlighted here is then identify SMART goals associated with improving in areas of concern or need.

You may want to use the goals created for your detailed project plan that apply to professional development for this area. So again, let's line these two documents up, and share those goals across the both documents.

So this is what the plan looks like. And you can see we have a goal. It's spelled out as a SMART goal. We want the staff that are going to help support this goal. We want the rationale for why that goal, and then the specific resources that you need in order to accomplish that goal.

And so I mentioned earlier that we took out that last section of the PD plan that was about resources, because we're making sure that we're identifying the resources we need here, and matching it up with the goal.

And then once we've set our goals, what we want to do is to think about the professional development activities that will support that goal. So on the next slide, we'll see that these are the activities that we want to accomplish, and then any follow-up activities as appropriate. So you'll see here we've got goal number one. We have an activity scheduled, and then we have a follow-up activity.

So when you get the form, these will be filled in as examples of what this might look like for you. We don't want to forget that we do have professional development requirements. So in this section, we want you to talk to us about the professional development that's required by law that you will find in 805-point-- what is it? I don't remember-- 21, 805.21 in rule.

And then the last thing I wanted to talk about because we've mentioned SMART goals a couple of times, and so thinking about as you're filling out your professional development plan, we've got the more overarching goal. In this case, it's improved MSG 1A attainment in ABE/ASE by 20% by increasing instructional content knowledge. Evaluate MSG data each quarter after training. So that's our goal.

So when we're thinking about our professional development activity that could help support that goal, one we might think about is the Master Teacher Academy English language Arts Modules. We're going to do once a month for starting in September until we've completed all six modules with our instructors. So, just an example of an activity that would support that goal. And as an aside, we are actually updating all of the Master Teacher Academy modules. So stay tuned for more information about that, both the English Language Arts and the math ones.

All right, well that's what I wanted to say about the PD plan. And I'm going to hand it back over to Elena now. And she's going to give us a review of what the timeline looks like. Elena?

ELENA MADRID

This year that we're currently in will be in blue on there. We're almost close to the end of the year, and as Beth had mentioned the PD plan will be due on June 30. But the detailed project plan will not be due until the new program year in August. So we're keeping the original deadline for the detailed project plan, even though things are changing. Hopefully the document is simplified enough where if you've already been working on your goals, you can just plug that stuff in.

And since the PD plan will already be due, you should already know what your PD will be for your goal. So you can just go ahead and plan on the detailed project plan early. But if you want to wait until the deadline, that gives you some time. We understand that there's a lot of things due at once. We understand there's closeouts that need to be taken care of. So the official deadline will be in the new program year in August.

And then moving on into the new program year, so you see year six extension. For most of you who are not familiar with how long the grants usually go, they generally go five years. This year is an exemption because we've had to make changes to the RFA. So we have this year six extension in green. You can see when the PD follow-up is due from that original PD plan that was submitted on June 30. The follow-up plan will be in February. And then PD recommendations will be made on June 1 of 2024.

And then at the end of the year, because again, this is the end of the grant, we will not be requiring that the detailed project plan or PD plan be due on June 30. But in the event that you are awarded the new grant, this is the schedule that will be applied for these documents.

Because there is some anticipation of possibly new grant recipients. We want to give everybody time across the board, even if you've already had this grant before, and you're kind of familiar with the process. We want to give you some time to get your planning in place and the due date will be I mean August 30.

But moving forward into the new program years, we want to get those plans before the new program year starts. So then we'll officially have everything aligned for June 30. So you see it's almost a two-year process for things to be totally aligned in what we're planning for, just because there are so many changes happening and we have to anticipate what might happen. So we're giving that flexibility going into the first year for the RFA.

With that, that is the timeline. I hope that it helps to align things for you and understand when things are due. So with that, just recapping of what we shared today, so the changes to the detailed project plan and PD plan. We learned about each document, what they are, how to use them, and their individual timelines. And then how they work in tandem to support organization, service, and instruction goals.

So how well they work in tandem is totally up to you and your organization. So it's going to be a lot. It's going to be very much dependent on how you work with your team members, how much you're communicating about the needs of the different areas of services that you're providing. So going back to that first graph that I heard sure shared early on in the presentation of time and effort, and what are the different things that are happening. How many different teams are possibly developed for these different areas? And how well are they really communicating?

So we're hoping with the alignment of these documents it's going to help to bring that closer together, the PD with the organizational goals.

BETH PONDER

Can you share what team was part of developing the new detailed project plan? Also, were grantees considered to be a part of the development of the DPP?

ELENA MADRID

Yes, so for the detailed project plan, it was a conversation of definitely everybody in our organization. Right? So we had our grant managers. We had our program specialists. Mahalia was involved. Blanca, people from teams. So it was a collaborative effort on our end. And then we also shared with TCALL, so that we could better align the documents. But in terms of getting feedback from the grantees in the field, no, there was not an official ask for that.

BETH PONDER

Do I understand that the PD plan is supposed to support the DPP, or at least the SMART goals, but it is due on June 30, while the DP is not due until August 30? So everyone really needs to get their SMART goals in June, or am I not understanding correctly?

ELENA MADRID

Correct. So what was happening was the two plans were being submitted separately. They always had different due dates. And different people were working on that. I can't speak specifically to how they were being worked on in organizations. We know that the PD Coordinator was responsible for working on that PD plan.

Generally, we would get the detailed project plan from the director. But we don't know if communication was actually happening for the two documents, so that they could be best aligned. And in all honesty, in the past the PD was really focused on instruction. So I there was a need. But now that we're expanding availability for PD, we want the PD to help support the overarching goals for the organization.

But because of the changes and how they've happened pretty quickly, yes, there's still different dates. We're giving more time for the detailed project plan to be due. But in all actuality, the goals for your organization should already be established before the new program year starts. That's why we're saying, if you want to submit it early, please do that on June 30.

BETH PONDER

Many programs are so scaled down that we wear many hats. Are requiring teams going to lead to just putting down names to meet the requirement?

ELENA MADRID

I think on the detailed project plan we are only really looking for one person for any of the goals. So your goal, I'm not sure what kind of goals you have. I mean if it's related to retention, that might be different from who is responsible for testing or data entry, right? My goal is to improve data integrity. That might be totally different from retention. So you're going to have different people probably leading those areas.

So when you're establishing your goals, you're going to want to put someone that definitely has their hands in that area.

BETH PONDER

Is it possible-- this is from Lorraine-- is it possible to send the project plan timeline now to the programs?

ELENA MADRID

Yes. We can share that.

BETH PONDER

Well, thank you, guys. Thank you, everybody for your participation and spending part of your morning with us.

ELENA MADRID

OK. Well thank you, everybody.