

Notes from the Field: Sample Plans & Templates to Create and Implement Summer College Preparation Programs for Individuals with Disabilities

Included in this section are templates given to students in the course entitled Success from the Start: Preparing Students with Disabilities for their First Semester in College, an online course offered through the Center on Education and Work at the University of Wisconsin-Madison. The templates include the following: whole group planning matrix, stake in the ground outline, plan components, Success From the Start: Planning guide for training activities, training activities matrix, recruitment goals and strategies, marketing and recruitment plan considerations, budget worksheet and justification, and scoring rubric to rate quality of summer prep plans.

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Whole Group Planning Matrix

Time Training Director	Location Logistics & Training Director	Activity Event Training Director	Personnel Evaluation/ Administrative Budget & Training Directors	Accommodations Evaluation/ Administrative & Budget Directors	Equipment/ Facilities/ Supplies Logistics & Budget Directors	Cost Budget Director works will all
Day __						
8:00-9:00						
9:00-10:00						
10:00-11:00						
11:00-12:00						
12:00-1:00						
1:00-2:00						
2:00-3:00						
3:00-4:00						
4:00-5:00						
5:00-6:00						

Stake in the Ground Outline

[Program Title]

[Program Goals and Objectives]

What are the program’s goals?
What are the program’s objectives?

Program Assumptions and/or Unique Considerations

What assumptions can be made about the program? (examples – all/no students will stay on campus – DSS personnel will be available — no rent for campus buildings)
What are some challenges to the Program?

Program Activities

What are the most important activities to include in the five-day training schedule?
What determination and awareness topics will be covered? (This may include motivation and self-advocacy.)

What academic skills and strategies will your program teach? (This may include note-taking, time management, test taking, and organization skills.)

Surprises or Additional Concerns

Plan Components

When making your plan something that can withstand the test of time consider the following suggestions.

Be CREATIVE but here is a list of possible sections for the Transition Orientation Plan

- **Title Page** (Center the Title on the Page, Proposal Submitted by, and nice if you can find a graphic- no page #)
- **Table of Contents** (indicating page numbers of the start page for each topic listed or ranges, Introduction/ Guiding Principles/ Objectives 3-7)
- **Overview of Program** (Pages of text to explain program, Needs Assessment, Program Rationale or Structure) be realistic, be creative.
- **Training Activity Plan** (Activity Narrative or Overview, Activity table or conference-style schedule) something that tells everyone what is happening when, for whom, how, where,) This document could be pulled out of the proposal and used days of the event—given to every participant, staff member, sent to parents and parent would know what the student would be learning/doing.
- **Administrative and Evaluation Plan** (Plan Narrative/s, Could Include Student Population Data, Pre-Post Survey Documents, Table documenting everyone involved, costs, contact information,
- **Logistics Plan** (nice to have a narrative plus a spreadsheet format—needs to include costs and contact information for parties.
- **Recruitment Plan** (brochures—overview of how you will market to students/high schools/DVR counselors etc. can be part of the program overview.)
- **Budget Plan and Budget Justification**

Training Plan:

The training plan prepares ALL involved parties for the preparation and delivery of the five day “experience schedule”. Each eight-hour day will account for the physical location and activity of each student involved.

The Training Plan will need to balance the mutually exclusive needs for some of the students. In other words, some activities may run concurrently. Training Plans will account for all student time. The complete schedule should possess four key elements:

1. beginning and end time for each activity
2. specific students (identified by disability) involved in each activity
3. instructors or support people involved in each activity, and
4. any special equipment or material necessary for the conduct of each activity.

Training directors may find templates useful and they may wish to provide a brief overview of the program. By creating a five-day template, the task becomes a fill in-the-blank exercise. Similar to the budget director’s job, the training director is seeking to fill in the information submitted by the leader and other directors. Training plans will focus on the details of the schedule.

Personnel Administrative Portion of the Plan:

Preparing your Administrative portion of the plan for your institution could prove much easier as you know and can easily identify the in-house Staff members (by title) who will be executing the program, you will know the names of the buildings, organizations on campus that can be contacted for support, companies that provide transportation, names of the dorms and campus housing policies etc. For your admin plan, you are trying to present a list of everyone who will be needed to properly execute your summer experience. This list could easily include interpreters, student helpers, instructors, office secretaries, and possibly even bus drivers or dorm representatives. Supplying contact information tells the administrators that this plan can continue even if you or the team executing the plan were to leave the institution.

Example: if the activity is an informational session hosted in the Library that tells students about academic support services offered in the library list Library Director, John Smith rather than just John Smith. The same is true for housing directors, health care facility personnel, food service personnel.

If an activity is conducted by a paid outside source, that person's contact information and the cost of service will be very important to give to the administration. It will also help you evaluate the session.

Example: If you ask students to rate sessions and it comes back that the session that cost the most also gained the highest rating then you can justify the cost for future programs.

Add to your list of Summer Experience Who's Who points of contact; their phone numbers, email addresses, and mailing addresses. Include also:

1. What services you specifically are expecting these people to do.
2. When and how long you want them to do it.
3. Where they are expected to perform these services.
4. How much you will pay them to perform these services. This information will then be plugged into the budget submitted to the administrator at your campus.

The administrative plan will include total and hourly salaries, required time commitments and specific duties in the administrative plan. All of this information will be given to the budget director for inclusion into the budget plan.

A good administrative plan will have a stand alone quality to it. A new arrival to your office should be able to take your plan, contact all of the key Summer Experience players, inform them of what is expected of them, and then advise both the Budget and Training Directors as to where each of the actors will fit into the other plans.

Evaluation:

It will help to include sample items from the proposed surveys and assessments OR a statement of the kinds of information you would obtain from the evaluation instruments used. For your individual project, you may want to have an evaluation plan in narrative form and describe the plan in detail, spelling out the how the data collected will be used in formative and summative components of the evaluation. You can also supply lots of information using a table styled format if it provides enough information to give the funding source a clear idea of how the program will include Formative (feedback – the on the spot collecting of information from participants and staff on the day of the event) and Summative Evaluation instruments. The summative evaluation approach would ultimately ask you to explain if what you did had any effect. This is the most important aspect of any evaluation because it carries with it the seeds of program validation. If you cannot demonstrate whether your summer experience had any effect, you are going to be hard pressed to justify perpetuating your program. In short, you must identify your evaluation criteria for success before you begin the experience in order to have a fair chance at examining the data long after the session has ended.

From a **formative** point of view, provide a clear view of how you are going to conduct systematic process improvement. Perhaps some examples accompanied by a paragraph or two of explanation would help here.

When you have listed an activity it helps to give the funding source an idea up front how that activity will be evaluated.

Example: Survey of participants and Staff involved using the following questions. Then provide some sample questions designed to measure the effect of the activity and who will be doing the evaluation.

Logistics:

Your plan should possess a stand alone quality that will allow others to put the program together. The targeted audience of the logistics plan is the planner tasked with ordering, reserving, renting,

or purchasing all of the necessary goods or services needed to make the summer experience a reality. To do this, the planner is going to want a list of all of the “stuff” that needs doing. He or she will also want to know, how much these services or commodities will cost, when they will be needed, and whom to contact to make sure it all happens.

It will not necessarily mirror the training schedule in appearance, but it will include all of the logistical support needed.

When connecting with the people who will support the plan, you will need to let them know where the activity will be happening, what time, what supplies, equipment and materials will be needed and you will want to either convey the amount in your budget or be asking their costs to provide those material objects or facilities. Then you will be adding the costs of the materials, use of equipment, and supplies into the budget you submit to the funding source.

Budget or Cost Information is good to have in **all part sections of the plan excluding the Training or “Activities” Plan**. Include an additional column for expenditures related to each service or commodity. This is an intentional replication for what will eventually be found in the budget plan and it will help you determine how to evaluate the costs of the entire program.

The “Cost” column appears in every sample matrix posted this semester in Resources (the whole group planning matrix and the logistics matrix which included a personnel, materials, facilities column) relates to the fact that it is something that will help that part of the plan stand on its own. An description added to each section of your plan explaining cost and how that part of the plan contributes to the proposed week will be helpful. That way if looked at separately, a funding source can see what costs are associated with different parts of the plan. Also if that administrator wants to ask questions about how much different activities, materials, or services will cost, he/she will not have to keep searching the budget portion for that information.

Here are questions to answer before considering the logistics plan ready to go:

1. Where exactly is each event on the training schedule going to be held (i.e. on campus, off campus, field trip, dorm room)?
2. To whom (specifically) will I have to contact to reserve and arrange for rooms, audio-video equipment, catering, printing support, promotional materials, insurance, etc, etc?
3. When exactly and for how long will each of these services or commodities be needed?
4. What will each commodity cost? Note: This is an intentional, albeit detailed, replication of the budget.
5. How many or how much of each service or commodity be needed?
6. What contractual agreements are necessary and who is authorized to sign them?
7. Who are the emergency phone call people? Who do we contact when the buses do not arrive, the printing material fails to get delivered or the food fails to show up?

Budget Plans:

If an administrator is looking over the plan he/she will definitely like the summation document that is shown in table format and the budget justifications help interpret the expenditures. Attaching the Budget Justification page might help. It gave a narrative as to where the money is going.

When working on the budget for your plans show a redundancy between the financial numbers in your budget and those projected from the logistics or administrative and evaluation plans.

Think of this redundancy feature as a “double entry bookkeeping” strategy that enables one area to cross check the other with regard to expenses. It also allows the logistics and admin plans to retain a “stand alone” quality.

Consider the budget plan as a summation of what you have already captured with regard to costs related to services, personnel, evaluation efforts, and the needed materials and supplies.

**Success From The Start
Planning Guide for Training Activities**

Day _____ Date _____

8:00 – 8:30 Registration and Introductions

Purpose (goal or objective):

Short description

8:30 – 9:00 Name of Activity

Purpose:

Short description

9:00 – 10:00 Name of Activity

Purpose:

Short description

10:00 – 10:15 Break

10:15 – 11:00 Name of Activity

Purpose:

Short description

11:00 – 12:00 Name of Activity

Purpose:

Short description

12:00 – 1:00 Lunch Information / Menu / Location

Short description

Training Activities Matrix for _____
[Program Title]

Monday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materi- als, and Facilities (what will be needed)
8:00 -- 9:00					
9:00 -- 10:00					
10:00 -- 11:00					
11:00 -- 12:00					
12:00 -- 1:00					
1:00 -- 2:00					
2:00 -- 3:00					
3:00 -- 4:00					
4:00 -- 5:00					

Tuesday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materi- als, and Facilities (what will be needed)
8:00 -- 9:00					
9:00 -- 10:00					
10:00 -- 11:00					
11:00 -- 12:00					
12:00 -- 1:00					
1:00 -- 2:00					
2:00 -- 3:00					
3:00 -- 4:00					
4:00 -- 5:00					

Training Activities Matrix for _____
[Program Title]

Wednesday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materi- als, and Facilities (what will be needed)
8:00 -- 9:00					
9:00 -- 10:00					
10:00 -- 11:00					
11:00 -- 12:00					
12:00 -- 1:00					
1:00 -- 2:00					
2:00 -- 3:00					
3:00 -- 4:00					
4:00 -- 5:00					

Thursday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materi- als, and Facilities (what will be needed)
8:00 -- 9:00					
9:00 -- 10:00					
10:00 -- 11:00					
11:00 -- 12:00					
12:00 -- 1:00					
1:00 -- 2:00					
2:00 -- 3:00					
3:00 -- 4:00					
4:00 -- 5:00					

Training Activities Matrix for _____
[Program Title]

Friday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materials, and Facilities (what will be needed)
8:00--9:00					
9:00--10:00					
10:00--11:00					
11:00--12:00					
12:00--1:00					
1:00--2:00					
2:00--3:00					
3:00--4:00					
4:00--5:00					

Saturday	Activity Title (what occurs during this time block)	Students Involved	Presenter (who will direct activity)	Room/Building (where will it happen)	Equipment, Materials, and Facilities (what will be needed)
8:00--9:00					
9:00--10:00					
10:00--11:00					
11:00--12:00					
12:00--1:00					
1:00--2:00					
2:00--3:00					
3:00--4:00					
4:00--5:00					

Recruitment Goals and Strategies

Goal 1: Communicate Availability of Program

Objective	Strategies	Product	Measure
Effectively communicate availability of program to students.	A. Services and contact information sent to incoming freshman in letter of acceptance.	Program brochure and informational letter, printed and electronic format.	Student marketing survey results, telephone and email inquiries, contact with high school students.
Effectively communicate availability of program to parents.	A. Services and contact information sent to parents/guardians of incoming freshmen in letter of acceptance. B. General information and application procedure sent to parents/guardians of incoming freshman.	Informational letter. Program brochure and informational letter, printed and electronic format. Overview or introductory Power Point multimedia presentation of program. Electronic links to and Program on DACC website.	Student marketing survey results, telephone and email inquiries, contact with high school students and/or parents.
Effectively communicate availability of program to schools and communities.	A. Staff conducts telephone/email contact and site visits with guidance counselors of area high schools. B. Staff attends area Transition Planning committees, disseminate information (print or electronic) on Program and refer to DACC website.	Program brochure and informational letter, printed and electronic format. Overview or introductory Power Point multimedia presentation of program. Electronic links to and Program on DACC website. Program press releases/scripts.	Student marketing survey, counselor referrals, number of staff guest speaking engagements, number and range of Transition Planning Committee meetings attended by staff.
Effectively communicate availability of program to service providers/agencies.	A. Staff conducts telephone/email contact and site visits with service providers/agencies. B. Staff attends area Transition Planning committees, disseminate printed information on Program and refer to DACC website.	Program brochure and informational letter, printed and electronic format. Overview or introductory Power Point multimedia presentation of program. Electronic links to and Program on DACC website. Program press releases/scripts.	Number and range of Transition Planning Committee meetings attended by staff, referrals from ORS.

Recruitment Goals and Strategies

Goal 1: Communicate Availability of Program (con't)

Objective	Strategies	Product	Measure
Effectively communicate availability of program within DACC.	<p>A. Develops and disseminates press releases on Program and TRIO grant, electronic and printed format, for inclusion in institutional newsletter or website.</p> <p>B. Staff attends intra-institution committee meetings to disseminate information on program to raise awareness and support.</p>	Program brochure and informational letter, printed and electronic format. Overview or introductory PowerPoint multimedia presentation of program. Electronic links to and Program on DACC website. Materials for display case of Program.	Referral lists provided by Admissions and Financial Aid, letter of congratulations from DACC president on innovative programming efforts, invitations from campus steering committee to present program to DACC Board of Trustees.

Goal 2: Promotion for long-term sustainability of Program

Objective	Strategies	Product	Measure
Collaborate with students to ensure long-term sustainability of program.	<p>A. Recruit and train potential DACC student volunteers.</p> <p>B. Recruit and train potential Program scribes/notetakers.</p>	Program evaluation data and summary of data. Informational or recruitment PowerPoint multimedia presentation of Program.	Student marketing results, participation of former Program students in summer programming.
Collaborate with parents to ensure long-term sustainability of program.	A. Recruit for fiscal or volunteer duties within parent advocacy groups.	Request for funding letter. Program evaluation data and summary of data. Informational or recruitment PowerPoint multimedia presentation of Program.	Parent advocacy groups established, fundraising campaign designed by community advisory committee.
Collaborate with service providers/agencies to ensure long-term sustainability of program.	<p>A. Secure partial funding for accommodations (interpreters).</p> <p>B. Develop collaborative and ongoing approach to securing outside funding (i.e., grants or foundation gifts).</p>	Request for funding letter. Program evaluation data and summary of data. Informational or recruitment PowerPoint multimedia presentation of Program.	Transition planning extended to service agencies, service agency referrals to DACC.

Recruitment Goals and Strategies

Goal 2: Promotion for long-term sustainability of Program (con't)

Objective	Strategies	Product	Measure
Collaborate with DACC to ensure long-term sustainability of program.	A. Secure renewal of TRIO grant. B. Maintain and expand the use of staff in Program development, implementation, and evaluation.	Request for funding letter. Program evaluation data. Informational or recruitment PowerPoint multimedia presentation of program.	Program becomes permanent program within, position at DACC is created with primary duties related to Program, and staff consults with faculty/staff in DACC institutional planning meetings.

Marketing and Recruitment Plan Considerations

- I. Steps in the Funding Plan: Solicit funding
 - oContact the Division of Vocational Rehabilitation and other disability sources for funding for solicitation of funds;
 - oGrant Writing
 - oSolicit funding from businesses around the state and surrounding states (with reciprocity) that require employees with majors offered by our university;
 - II. Steps in the Recruitment Plan: Accessing students
 - oPreliminary development of program brochure and dissemination of final product to area high schools;
 - o Include the program's brochure along with the student's requested application for DSS services;
 - oPresenting in-service activities to admissions staff;
 - oPresenting in-service activities to coaching staff;
 - oAttend campus open house activities;
 - oProvide brochures and a description of the program for student orientation activities and campus tours;
 - oProvide brochures to DSS office for inclusion in information case;
 - oEncourage DSS staff to disseminate brochures to prospective students;
 - oAdvertise the program on University's Website;
 - oInvolvement in campus committees and presentations and follow-up calls with ancillary departments working with students with disabilities;
 - oParticipation in Transition Fairs sponsored by area high schools focusing on transition needs of students;
 - oPotential day-long presentation focusing on guidance counselors, special education teachers, social workers, vocational specialists, and vocational counselors for the purpose of introducing the Program;
 - oDevelop a Website that includes information about the purpose of the program and procedures for access;
 - oSend informational brochures and business cards to surrounding school district personnel associated with students with disabilities;
 - oParticipate in local school district's IEP's for students wishing to pursue postsecondary education.
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**Budget Worksheet and Justification
Budget Summary**

Description	Expense	In-kind contribution
<u>Personnel Services</u>		
Project director		
Faculty reassignment		
Horizons faculty (1PT)		
Administrative assistant		
Dorm counselors		
Student workers		
Student volunteers		
Deaf interpreter		
Fringe benefits		
<u>Supplies/Materials</u>		
Accessibility resources		
Copy-paper supplies		
Classroom supplies		
Promotional supplies		
Postage/Mailings		
Celebration awards		
T-Shirts		
Promotional materials		
Follow-up activities		
<u>Contractual services</u>		
Consultant fees -- 4 hours		
Insurance		
Food services \$50/per		
Check-in & parent snacks		
Housing \$60/per		
Classrooms		
Assessment		
Evening programming		
<u>Travel -- staff</u>		
<u>TOTALS</u>		

Budget Justification Summer Experience

_____ participants will be charged a fee of \$_____ for the five day summer experience. This will generate _____ which will make the program self-sustaining. The _____ University Advancement or local Community Foundation will provide at least two full scholarships or several partial.

Personnel Services:

Built in are amounts for Project Director/Instructor and additional _____ Faculty. We will utilize some existing resources on campus (Student Services, Disabilities Coordinator, Registrar, etc.). The plan provides for an administrative assistant (The assumption is that this represents supplemental income for a full time person who is familiar with the budgeting process as well as mailings, etc.) Two part time student workers will assist throughout the program planning, implementation and follow up process. We will employ dorm counselors (one male & one female) for evening supervision. Personal assistants will be the responsibility of the students who require them. Local Disability Services will provide Deaf interpreters as needed.

Fringe benefits:

This was computed at 15% of wages (University or state employees who qualify for retirement benefits cost approximately 20% in fringes while student workers are at about 10%, so this is an average).

Supplies/Materials:

Accessibility Resources – We may need some additional things depending on disabilities to maximize access (e.g. FM monitors).

Copy-paper supplies – this represents 5,000 copies at \$.05/page.

Classroom supplies – Day planners, notebooks, pencils, pens, computer disks, overhead acetate/pens. Costs should not exceed \$20/student.

Postage/mailings – This represents \$5.00/student plus postage for mailing promotional materials.

Celebration & Awards – This represents prize monies for scavenger hunt and certificates/awards for ending ceremony.

T-shirts and caps for each participant plus five student workers/dorm counselors at \$10.00/individual.

Promotional materials include brochures and/or flyers to publicize summer experience.

Follow-up Activities – This line item provides some resources for mid-semester or second semester seminars to provide additional support to summer experience participants.

Contractual Services:

Consultant fees – We may want to bring in guest lecturers or provide resources for specialists to assist in evaluation, etc.

Insurance is of the supplemental variety that just protects us should someone get hurt while enrolled in the program.

Food is computed at \$50/student for the week and housing is at \$60/week. \$50.00 is budgeted to cover the expense of donuts, juice, & coffee during Dorm Check-in as well as cookies & punch for parent orientation. Assessment amount is for scoring and purchasing materials.

Evening programming allows \$200.00 for the Get Acquainted cookout.

Expenses for other evening events, if off campus, are at the expense of each individual student. University Van will provide transportation for off campus evening.

Travel:

A nominal amount to reimburse individuals for travel expenses in outreach activities. This represents 750 miles of travel at \$0.345/mile

Note:

An in-kind contributions column suggests university and other organizations contributions to this endeavor. Student volunteers will, in large part, be the result of Service Learning Opportunities from summer classes (both Special Education and Physical Education), or Student CEC members, Service organizations. The University provides Ambassadors during the summer to handle freshmen orientations and scheduled open houses.

Scoring Rubric to Rate Quality of Summer Prep Plans

Section	Scoring Rubric Criteria	Present	Absent	Comments and Suggestions
Cover Page	Program Title			
	Preparers name			
	Date			
Table of Contents	Is clear and concise -- sections are broken down by page numbers.			
	Identifies the component parts of the proposal.			
Overview of Program	Is clear and detailed.			
	Tells the first-time reader what the program will accomplish and who the program will serve.			
	Presents a concise lead-in to the program.			
	Is realistic and creative.			
Training Activity Plan	Clearly lists program activities by day, hour and topic.			
	Provides each person working on the program with information that can be followed when executing the program.			
Administrative Plan	Contact information provided for DSS staff and other presenters.			
	Lists responsibilities and activities personnel will complete.			
	Has stand alone quality -- can continue even if team executing were to leave.			
Evaluation Plan	Identifies formative and summative evaluation strategies.			
	Identified types of collected data.			
	Identifies activities to be evaluated during program (pre-post tests, needs assessments).			
	Identifies student outcome data (GPA, Retention, DSS and Counseling services requested).			
	Detailed account of all materials and supplies needed to host program.			