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*Thomas...*

Office of Vocational and Educational Services  
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# TransCen, Inc.

File Transition

July 22, 1994

Stan Herr  
224 Old Executive Office Building  
Washington, D.C. 20500

Dear Stan,

It was a pleasure to meet you during your visit to Kirsten Davidson's worksite. I hope it provided a useful perspective.

I am enclosing a recently published article that appeared in the Journal of Career Development for Exceptional Individuals entitled, "Engaging Employers in Transition: The Bridges Model." It presents national data on *Bridges* during its first three years. It better articulates, I hope, some of the issues I mentioned during our brief visit.

Please feel free to contact me if you have any questions or desire any further information. Thank you for your interest in the issue of transition from school to work and our work at TransCen.

Sincerely,



Richard G. Luecking  
President

RGL/klw

Enclosure

## Involving Employers in Transition: The Bridges Model

GEORGE P. TILSON, JR.  
RICHARD G. LUECKING  
MARK R. DONOVAN

FEDERAL POLICY INITIATIVES on school to work transition for youth with disabilities are entering their tenth year. From the start, transition has been envisioned as the process through which special education students move from school programs to employment (Will, 1983) and/or other aspects of adult citizenship (Halpern, 1985). By the end of the 1980s, considerable data had been generated; these data subsequently provided the foundation for passage of the Individuals with Disabilities Education Act (IDEA) of 1990. Through its inclusion of school to adult life transition planning, IDEA has solidified and formalized early initiatives.

Nearly a decade after transition policies were introduced at the federal level, unemployment rates for adults with disabilities continue to be reported as ranging from 50-75% (Louis Harris and Associates, 1987). Several studies have estimated that more than half of all exiting special education students remain unemployed one year later; for many of those young adults who do manage to secure jobs, long-term underemployment becomes a fact of life (Chadsey-Rusch, Rusch, & O'Reilly, 1991).

The general public and employers in particular may be inclined to interpret these outcomes as further indication that people with disabilities lack the skills to become competitively employed. It has, however, been well-documented that many special education recipients, across a wide spectrum of disability type and level of severity, leave school with skills, talent, and a strong desire to join the workforce (Callahan, 1992; Neubert, Tilson, & Ianacone, 1989; Siegel, Avoke, Paul, Robert, & Gaylord-Ross, 1991; Sowers, 1991; Wehman, 1992). Furthermore, many of these young adults have the potential to develop meaningful careers, beyond entry level jobs, and to make significant contributions to their communities. But before they can realize that potential, they may have to overcome a number of barriers; disability is but one of these barriers. Public misperceptions, life circumstances

beyond the individual's control and other issues unrelated to disability can be equally troublesome.

The employment success of many young adults with disabilities must be credited first to the youth themselves, but also to effective transition planning, training, and support provided by professionals, family, and other advocates. Numerous authors have identified the key players in transition (Gajar, Goodman, & McAfee, 1993; Wehman, 1990), pinpointed the skills and competencies that the transition professional should have (DeFur & Taymans, 1993), and rated various programs and services around the nation as to their status as a "best practice" (Kohler, DeStefano, Wermuth, Grayson, & McGinty, 1993). It has been suggested that employers should be considered one of these key players (Rhodes, Sandow, Mank, Buckley, & Albin, 1991; Tilson & Tebbutt, in press; Wehman, 1990), yet little has been suggested regarding a role for employers other than to do the hiring. There has been a shortage of replicable examples of school/business partnerships for transition programs serving youth with disabilities (Tilson & Tebbutt, in press).

#### AN INTERNATIONAL CORPORATION TAKES NOTE

In 1989, Marriott Corporation, and the Marriott family, sought a focus for charitable giving and community involvement. Their research identified a major issue: the poor employment prospects of the majority of youth with disabilities, and the uncertainty of business regarding how to work with this applicant pool. This issue was particularly striking to the family and the company in light of Marriott Corporation's long-standing positive experience offering employment opportunities to people from diverse backgrounds, including many with disabilities (R.E. Marriott, personal communication, June 4, 1991). Additionally, from a business standpoint, spending vast sums to educate and train young people — who most often remained unemployed and in need of continued support from tax dollars after leaving school — seemed a remarkably poor return on investment.

Several other important trends were also noted. In the general population of the U.S., the number of young adults aged 18-25 is decreasing steadily. Employers have traditionally relied heavily upon this group as a source of entry level workers. This pattern will continue through the turn of the century (Hudson Institute, 1988). Business is facing the need to become more skilled at managing diversity in the workforce (Fabian, Luecking, & Tilson, in press; Perry, 1991). In fact, the U.S. Department of Labor (Hudson Institute, 1988) predicted that by the end of the century 75% of the workforce will be comprised of women and minorities. Additionally, the employment sector wants a

greater voice in the education of the nation's students as concerns increase that schools are not adequately preparing students for the work place (Asche, 1993; Perry, 1988; U.S. Chamber of Commerce, 1993).

It is against this background that the Marriott Foundation for People with Disabilities was established by the Marriott family, with a mission to enhance employment opportunity for young people with disabilities by addressing needs of both youth and employers. The Foundation developed and launched its signature project, Bridges . . . From School to Work, in Montgomery County, Maryland (Donovan, 1990). Four additional sites have been established in Chicago, San Francisco, Washington, D.C., and Los Angeles. In each of these locations the Bridges program is implemented through a selected community-based organization that has a proven record of fostering the competitive employment of people with disabilities. The pilot project site in Montgomery County Maryland is administered by TransCen, Inc., a non profit agency that specializes in school to work transition for young people with disabilities. TransCen also operates the Washington, D.C. project. The other replication sites are administered by the University of Illinois at Chicago/University Affiliated Programs, the San Francisco State University Foundation and the Los Angeles Project With Industry. Within each local site a formal Memorandum of Understanding is developed among the Foundation, the community-based organization, the school system, and the state office of vocational rehabilitation.

In this article, the authors describe this innovative business-driven model, present selected outcomes from the first three years, and discuss implications for the field as well as for further research.

#### DESCRIPTION OF THE BRIDGES . . . FROM SCHOOL TO WORK MODEL

Bridges works with young people with disabilities in their final year of high school and partners with local employers, to help develop competitively paid internships for these students during that year. These work experiences, supported by Bridges staff, provide a chance for both the youth and the employer to develop appropriate skills and confidence. Such skills and confidence can then be a catalyst for long term, mutually beneficial employer/employee relationships.

#### *Participant Selection Criteria*

Students participating in the program represent all disability categories and levels of severity of disability. They are referred by special educators and attend different levels of school programs and services, from regular class/resource situations to separate, residential facilities. The

only criteria for selection into the program are a consistent and demonstrated interest in participating fully and a schedule that can accommodate working.

The Bridges model is noncategorical, that is, referral and acceptance into the program are not determined by a particular disability, nor does the basic program differ based on disability. All students participate in the same process, i.e., referral, orientation, job search, job placement and on-the-job support. Throughout this process, accommodations are made for individual characteristics, not disability label. The proportionate representation of each disability very nearly reflects the prevalence of these disabilities in the general population of students in special education nationally (Wagner, D'Amico, Jay, Butler-Nalin, Marder, & Cox, 1991). It should be noted that 75% of the participants in Bridges are minority, a reflection of the communities in which the program operates. Refer to Tables 1 and 2 for a description of the 762 youth who have participated in Bridges from January 1990 through December 1992.

### *Bridges Staffing*

Each project site employs a Project Director to oversee and manage the local project and a staff of Employer Representatives who act as the primary liaisons with the participating students, their families, schools, employers, and other relevant parties. The Bridges staff simultaneously undertake or support activities designed to recruit and orient employers and to prepare students for their internships. Figure 1 depicts the components of the Bridges model.

Table 1  
*Bridges Participants by Gender and Race Total N = 762*

|                  | N   | %  |
|------------------|-----|----|
| Gender           |     |    |
| Female           | 300 | 39 |
| Male             | 462 | 61 |
| Race             |     |    |
| African-American | 407 | 53 |
| White            | 193 | 25 |
| Hispanic         | 89  | 12 |
| Asian            | 53  | 7  |
| Native American  | 3   | *  |
| Other            | 17  | 2  |

\* Less than 1%

Table 2  
*Bridges Participants by Disability* Total N = 762

|                      | N   | %  |
|----------------------|-----|----|
| Primary Disability   |     |    |
| Learning Disability  | 347 | 46 |
| Mental Retardation   | 190 | 25 |
| Emotional Disability | 117 | 15 |
| Hearing Disability   | 53  | 7  |
| Mobility Impairment  | 14  | 2  |
| Speech Disability    | 11  | 1  |
| Visual Disability    | 10  | *  |
| Epilepsy             | 4   | *  |
| Head Injury          | 3   | *  |
| Chronic Illness      | 1   | *  |
| Other                | 12  | 2  |

\* Less than 1%

#### *Orientation and Training of Employers, Youth, and Families*

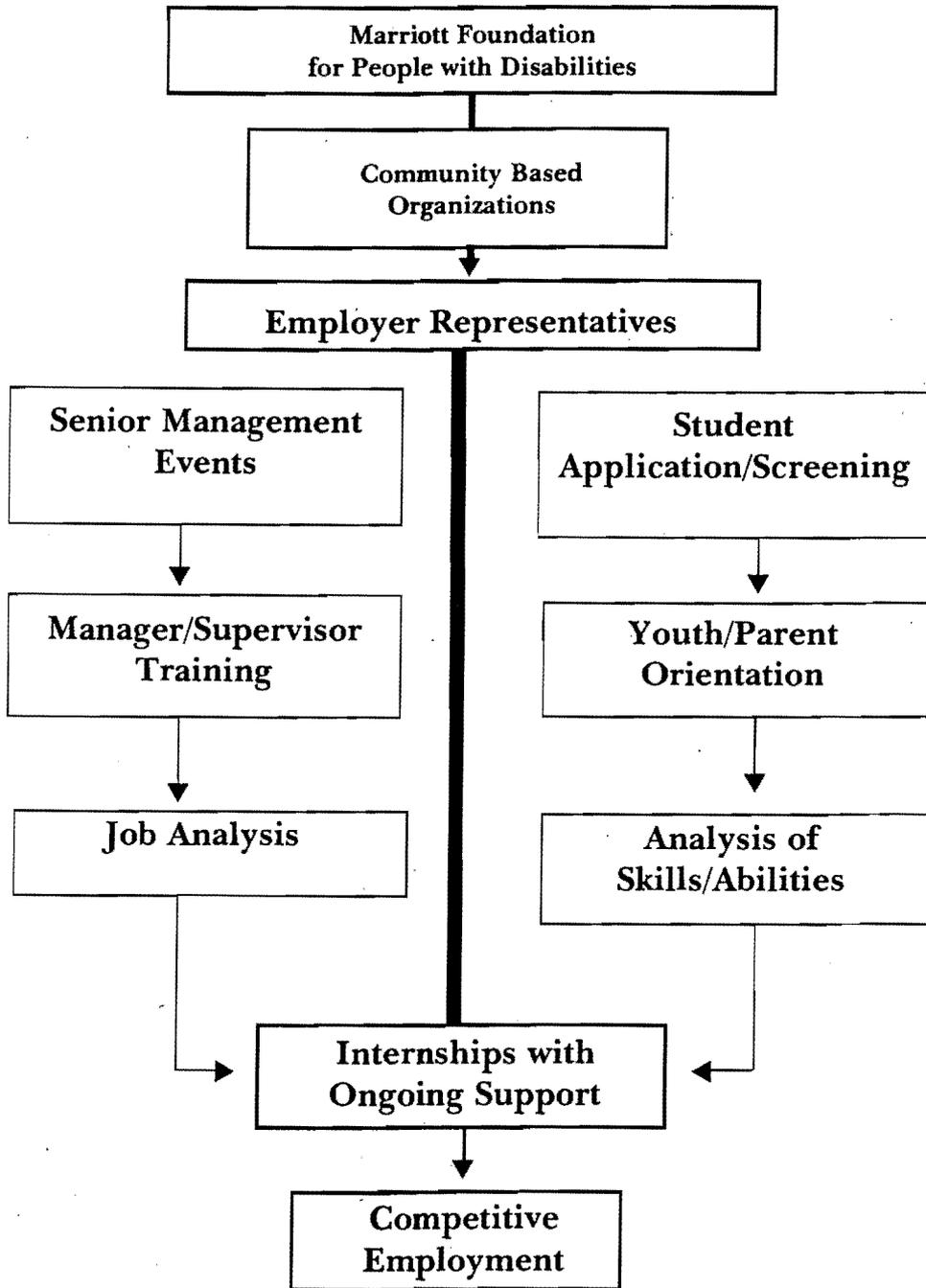
Managers, supervisors, and co-workers in participating companies receive training in disability awareness, accommodations, and strategies for integrating employees with disabilities into the workplace. The participating youth and their families participate in orientation sessions to learn about the program, explore employer expectations, identify ways in which parents and families can support these youth as they enter the workforce, and to build confidence based upon an examination of the young person's skills, interests, and experience.

#### *Job Development: Establishment of Business Partnerships*

Establishment of a broad network of employers in each targeted community is one of the primary goals of the Bridges program. In each city the Marriott Foundation introduces the program to community leaders, including top school and agency administrators, elected officials, and representatives of business, at the executive and senior management levels. Publicizing the mutual benefits of the program, the Foundation seeks a commitment from these leaders to become active participants in the program.

The Employer Representatives conduct extensive job development activities in order to build a large network of employers which includes private companies, government agencies, and private non-profit organizations. That network encompasses a wide range of industries and enterprises, and the resulting jobs include a significant variety of occupational areas. To assist with this effort, each site establishes a

Figure 1  
*Components of the Bridges From School to Work Program.*



Business Advisory Committee (BAC). Comprised of representatives from the business sector, the BAC ensures that a business perspective is maintained. Further, BAC members assist with marketing the program to other employers, and offer guidance relative to most aspects of the program's activities.

#### *Internship-Intern Matching Process*

Bridges internships are generally two to six months in duration, depending on the needs of both the employer and the intern. The majority of positions are parttime due to the youths' school commitments, with a national average of 21 hours worked per week. As shown in Figure 1, Employer Representatives screen identified positions for required skills, qualifications, workplace culture, pace of operation, and other unique characteristics and demands. At the same time, significant effort is put into identifying the skills, characteristics, interests, and experience of individual students. The goal is to establish optimum compatibility between the job and the individual.

Bridges students exhibit a wide range of unique needs, learning styles, and behavior patterns. These characteristics can be addressed proactively through a formal assessment of potential accommodations. The Marriott Foundation fully expects Bridges staff to operate from a strengths, rather than deficits, perspective. Anticipating accommodations allows the Employer Representative to more effectively support both the intern and the employer.

#### *Employer Representative Consultation Role*

Clearly, a time-limited work experience for students in their last year of special education is one of many steps on the transition continuum (D'Amico & Marder, 1991; Tilson, Taymans, & Germino-Hausken, 1991). Some youth will complete their Bridges internship and exit high school requiring no specialized support services. Many others will need some type of ongoing support. In these cases, Bridges staff work closely with appropriate school staff, adult service providers, vocational rehabilitation counselors and other agencies offering vocational and social services to ensure that support is identified, planned, and provided.

The Marriott Foundation and the authors recognize that effecting community-based, competitively paid work experiences for special education high school students, in and of itself, is not unique; job placement has been a part of many school transition programs for years. The Bridges program stands out for its extensive outreach, support, and follow-up, working closely with the employer as well as the young adult.

Business needs and requirements are consistently given high priority (Fabian, Luecking, & Tilson, in press).

*Project Data Collection and Management*

In order to document project effectiveness for accountability and evaluation, each project site gathers extensive data prior to, during, and after the internships. At the Marriott Foundation, this information is analyzed and maintained by an extensive data management system. This system tracks an array of variables, several of which are presented in this paper.

OUTCOMES AFTER INITIAL THREE YEARS OF BRIDGES OPERATION

*Referral and Internship Placement*

From January 1990 through December 1992, a total of 762 students were referred and accepted by the Bridges program in the four sites in operation at that time: Montgomery County (Maryland), Chicago, San Francisco, and Washington, DC. Eighty-six percent (659) were hired by employers for competitive, paid internships. Tables 3 and 4 depict the range of businesses in which placements were made and select characteristics of these organizations. Internship positions included jobs as diverse as office clerk, auto mechanic, child care worker, chef's assistant, stagehand, and graphic design assistant. It is important to note that unlike many internships, these were actual positions which needed to be filled by the employer. Each student was on the participating company's payroll, and received at least minimum wage. For many students, the Bridges experience represented their first paid employment. The internship placements, therefore, represent primarily entry level jobs. However, the range and breadth of employment settings offers a significant range of work opportunities.

Table 3

*Businesses Hiring Bridges Interns (by Type and Company Scope).*

|                        | N   | %  |
|------------------------|-----|----|
| Type of Business       |     |    |
| Private for Profit     | 495 | 75 |
| Private not for Profit | 49  | 7  |
| Public Sector          | 113 | 17 |
| Company Scope          |     |    |
| Local/Statewide        | 272 | 41 |
| Regional               | 105 | 16 |
| National/International | 280 | 43 |

Table 4  
*Businesses Hiring Bridges Interns (by Primary Industry).*

|                          | N   | %  |
|--------------------------|-----|----|
| Retail Trade             | 198 | 30 |
| Food Service/Restaurant  | 79  | 12 |
| Health Services          | 45  | 7  |
| Research                 | 40  | 6  |
| Finance, Insurance       | 38  | 6  |
| Public Utilities         | 32  | 5  |
| Lodging                  | 35  | 5  |
| Manufacturing            | 23  | 4  |
| Amusement/Recreation     | 23  | 4  |
| Business                 | 17  | 3  |
| Educational Services     | 19  | 3  |
| Communications           | 12  | 2  |
| Personal (laundry, etc.) | 12  | 2  |
| Public Administration    | 14  | 2  |
| Automobile Services      | 9   | 1  |
| Construction             | 6   | 1  |
| Transportation           | 4   | 1  |
| Real Estate              | 3   | *  |
| Other                    | 35  | 5  |

\* Less than 1%

The amount of time participating students worked at their internship sites each week varied according to employer need and the student's school schedule. The mean number of hours per week was 22 and ranged from 3 to 50 hours per week. The mean wage received was \$5.23 per hour, ranging from minimum wage to \$10.55.

#### *Internship Completions and Employment Beyond the Bridges Internship*

Of those youth who found positions, 542 (82%) successfully completed their internships. As stated, both the employers and students understood from the onset that the positions were time-limited. Therefore, the Foundation was pleased with one unexpected outcome: among those interns who completed their internships, 400 (74%) were subsequently offered extended employment by their host companies; another 27 (5%) were offered competitive employment elsewhere, immediately following their Bridges internship.

Seventy-two percent (391) of the internship completers accepted ongoing competitive employment, 73 (13%) returned to school, and 59 (11%) sought other employment either independently or through formal employment programs.

## DISCUSSION

In this article the authors described the establishment of a unique school to work transition project that grew out of business experience and continues to take an employer-driven approach. Components of the Bridges Model were presented, along with selected descriptive data from the Marriott Foundation data management system.

A key feature of the Bridges program is that *all* students are considered candidates for participation regardless of the type and severity of disability. As indicated by the Bridges data, the breakdown of participants by disability is not greatly different from that of the national special education population.

Overall, the internship placement and employment outcomes for youth participating in the Bridges program from 1990 through 1992 appear very positive. The placement rate of 86% far exceeds nationally quoted employment figures for exiting special education students. Preliminary examination of the data suggest that there was no discernable difference in placement rates by disability, although further analyses will be conducted in the future.

While the Bridges placement rate suggests an effective placement process, there remains the need to examine the reasons for the non-placement of 103 young adults (14% of those referred to and accepted into the program). In addition, the 82% internship completion rate indicates that the support students receive on the job is appropriate in the large majority of cases; however, reasons for termination should be studied to determine the influence of such factors as job matching, support needs of both the employer and the student, pre-internship educational preparation, parental support, and other non-work life needs.

An unexpected outcome of the Bridges program in all five cities is the high percentage of students offered continued employment with their host companies. This is unexpected because it is understood by all parties that the internship is time-limited and there is no obligation on the part of the employer or the student to continue the employment relationship. While more study of this phenomenon is warranted, this outcome suggests that employer exposure to disability as well as the support and training they receive remove many of the barriers which otherwise inhibit positive hiring behavior.

Bridges, as a time limited internship program, is but one facet of a student's transition. Therefore, closer examination is necessary of other factors that influence positive post-secondary employment outcomes, such as parental influence, the availability of earlier community-based vocational training, and the need for and the availability of post

secondary vocational and human services. Certainly these and other factors have impact.

The consistently positive outcomes of Bridges during its first three years of operation should be viewed with one caveat: further study is necessary to examine the long term influence of the Bridges internships on post secondary employment outcomes. For example, research into the employment status of Bridges students who have been out of school for up to two years is currently underway.

As the literature has shown, there are a number of factors beyond paid employment that influence post-secondary success. Yet it is clear that special educators need to look toward real work experiences and the direct involvement of employers as critical components of transition from secondary education.

Results and feedback to date indicate a program that is meeting its mission of enhancing employment opportunities for youth with disabilities. Efforts such as Bridges offer managers an opportunity to not only influence the vocational preparation of young people with disabilities, but also to better prepare for a more diverse workforce. The opportunity for participating employers and young adults to learn from each other creates the kind of mutual benefit upon which all long term success is based. Bridges represents an innovative approach to the transition challenge deserving of ongoing study.

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#### AUTHOR NOTE

Established in 1989 by the Marriott Foundation for People With Disabilities, and developed from an employer perspective, "Bridges . . . from school to work" offers an innovative approach to transition. The program works intensively with businesses to ascertain their needs relative to specific jobs, and with youth in their last year of special education to identify skills, interests and experience. Additionally, both are prepared and supported to work effectively with the other. The result: competitively paid

internships as a stepping stone to productive employment. The authors describe the Bridges model, and present and discuss selected outcomes from the program's first three years of operation.

Bridges . . . From School to Work is supported by grants from the Marriott Foundation for People with Disabilities, the U.S. Department of Education (CFDA 84.234, 84.158Q, 84.128A), the U.S. Department of Labor (CFDA 92.001), the Mitsubishi Electric America Foundation and other state and local resources.

George P. Tilson, Jr., is Senior Vice President of TransCen, Inc. and project director of the Montgomery County, Maryland "Bridges" program. Richard G. Luecking is President of TransCen, Inc. in Rockville, Maryland. Mark R. Donovan is Director, Marriott Foundation for People with Disabilities, Washington, D.C.

*Carol-FYI  
JL*

June 17, 1994

*Stan*

We cover kids above 17 if they are covered by State law most are covered to age 21 or above. I wasn't clear about that yesterday. Only one State Michigan goes above 22. This may be a reauthorization issue. Also, I was surprised to learn when I got the printout that there is an increasing number of LD kids in 18-21 cohort. This is a significant change over the figures during the early years of P.L. 94-142 implementation and, I believe is a positive trend in that this population which has an historically high drop-out rate appears to be staying in school.

I have enclosed the 1984 numbers which show both number increase and a percentage increases of LD kids.

*Tom*

Thomas Hehir  
Director, OSEP

*2-2-50*

OPTIONAL FORM 99 (7-90)

**FAX TRANSMITTAL**

# of pages = *9*

|             |                    |         |                     |
|-------------|--------------------|---------|---------------------|
| To          | <i>Stan Hehir</i>  | From    | <i>Tom Hehir</i>    |
| Dept/Agency | <i>White House</i> | Phone # | <i>202-205-558</i>  |
| Fax #       | <i>456-7028</i>    | Fax #   | <i>202-260-0416</i> |

**Free Appropriate Public Education (FAPE) to  
Students with Disabilities aged 18 through 21 under Part B of the  
Individuals with Disabilities Education Act (IDEA-B)**

- Under IDEA-B, States are required to provide FAPE to eligible children 3 through 17 years of age<sup>1</sup> (34 CFR §300.300); many States<sup>2</sup> have age mandates that require services to age 21 (30) and others require services through 21 (24). (See attached list of States with mandated age ranges.)
- All IDEA-B requirements apply to eligible youth aged 18 through 21, as long as the youth are within a State's mandated age range. There are no express requirements that apply only to students with disabilities aged 18-21 years old.
- IDEA-B requirements related to transition services apply to eligible youth beginning at age 16.<sup>3</sup>
- During the 1992-93 school year, 4,893,865 youth 18-21 years of age were counted as served under IDEA-B. Under Chapter 1 Handicapped, 275,377 were counted as served.

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<sup>1</sup> The IDEA requires States to assure that FAPE is available for all children with disabilities aged 6 through 17, and further requires FAPE for all such children aged 3-5 and 18-21 -- to the extent that the FAPE mandate is not inconsistent with State law or practice, or the order of any court. (20 U.S.C. 1412(2)(B))

<sup>2</sup> Figures include 60 entities, the 50 States, Puerto Rico, DC, BIA, Virgin Islands and the Pacific Territories.

<sup>3</sup> The transition requirements apply to children younger than 16 if determined appropriate.

draft and note to Carol

MEMORANDUM TO SECRETARY ROBERT REICH  
SECRETARY RICHARD RILEY  
SECRETARY DONNA SHALALA

FROM: Carol H. Rasco  
Assistant to the President for Domestic Policy

SUBJECT: Transitions from School to Work for People with  
Disabilities

One of the most challenging problems facing young people with disabilities and their families is to transition successfully from school days to workplaces or activity centers. As you know the School to Work Opportunity Act requires that all students, regardless of disability, be eligible for the programs created under this law. The topic of transitions is also relevant to the reauthorization of IDEA (the Individuals with Disabilities Education Act), and questions that arise as to the programs authorized under that Act for young adults. With the implementation of the School to Work Opportunity Act, the reauthorization of IDEA, and heightened interest in the Social Security Administration of assisting individual with disabilities to enter the workforce, it seems timely to have a few meetings with key experts in your departments on the transitions issue.

Could you kindly designate one or two representatives from your department. If appropriate, the individual could be the same individual you have recently named for the proposed National Disability Policy Review.

Carol: An alternative, and perhaps less confusing approach to the above draft memo might be to build this meeting around Judy Heumann (whose already been named by Education as its representative on the National Disability Review), Doug Ross (the Assistant Secretary at Labor responsible for implementing the School to Work Program), and Susan Daniels at SSA who is most ardent (and I think informed) on this subject, and whatever other two names Labor and HHS puts forward on the broader review. This way we don't appear to be creating another distinct group, and can move ahead with exchanging information, planning a state of the art conference, and encouraging best practices and thinking at state and local levels.

FYI, I'm informed by Jack Raport, the Labor official working most directly with the early implementation of the act that 8 states

They soon

This makes the most sense to me.

pls send

(MA, ME, NY, NJ, MI, WI, KY, and OR) have begun to move ahead with School to Work, and provide assurances they will serve all disabled students. Some have state legislation that advances that transitions aim. Fifteen local programs have also been funded as laboratories for change, including Boston, Austin, Coos Bay, Rochester, Southern New Hampshire, and New Haven.

*Stan*

EXECUTIVE OFFICE OF THE PRESIDENT

13-Aug-1994 03:34pm

TO: Stanley S. Herr  
TO: Jeremy D. Benami

FROM: Carol H. Rasco  
Economic and Domestic Policy

SUBJECT: transition services

Stan, do you suggest we go ahead and start a special group on transition services/issues or is it better to work this into the full disability review? I am somewhat inclined now to make it part of the overall review....

In the meantime, we could make it the topic of discussion at an appointees meeting, perhaps then a DPC meeting to get some movement toward improvement of what is already in place?

I'd appreciate your thoughts.

May 11, 1994

FAX TO STAN HERR - 456-7028

FROM: Prudence Lezy *PL*

SUBJECT: Transition Meeting

Stan, I believe you and Judy discussed the meeting Carol Rasco wants regarding transition. Judy suggests holding two meetings grouped as follows:

I. Transition

- Bob Williams
- Susan Daniels
- Kate Seelman
- Tom Hehir
- Mike Ward -- who?
- Howard Moses
- Naomi Karp

II. Outside

- UCP *esp. delinquency prevention*
- TASH *Justice other*
- ARC *Labor School to work Generic Programs*
- LDA
- NCIL
- DREDF (Diane Lipton)
- P&A
- CSAVR
- NASDSE
- and those persons in Group I

I will be out of the office until May 25th. If you have any questions, please call Andy Pepin at 205-9439.

Thanks for your help.

*Policy paper-- analyze Transition paper in Ed briefing*

EXECUTIVE OFFICE OF THE PRESIDENT

18-Aug-1994 05:11pm

TO: Stanley S. Herr  
TO: Jeremy D. Benami

FROM: Carol H. Rasco  
Economic and Domestic Policy

SUBJECT: Vulnerable Populations

I have just had an interesting meeting with my friend, Dennis Beatrice, of the Kaiser Family Foundation. He shared with me a group the Foundation has started, the Center for Vulnerable Populations, at Brandeis... Trish Riley and Stan Walloch (sp.?) head it. They are looking at the commonalities among the elderly, the disabled, the chronically mentally ill, etc. They have been doing work on how various health plans affect these populations. Dennis came to talk about how the Center might become better known to federal policy makers and assist us all if needed. We talked in general about a possible half day roundtable with key federal policy makers in these areas to discuss common themes among the vulnerable. We also talked about a possible follow breakfast with cabinet officials. He is going to send me printed material on the Center and then fairly soon a draft concept paper on an "event." I told him the two of you would work with him once we decide to move ahead. We are potentially looking as soon as late October I will forward the a copy of the reading material as soon as I receive it and will keep you posted on follow up with him.

I did, Jeremy, go ahead and give him Blancato's address and a littel background on the WHCOA.

Thanks.

THE WHITE HOUSE

Kipran

Dear Bill,

Many thanks for your  
useful packet of materials on  
the transition issue.

I've passed them on to  
Carol. I know she appreciates  
your information and kind  
willingness to assist.  
Sincerely,  
Stan

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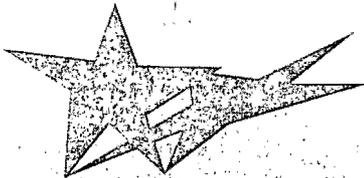
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# SCHOOL TO WORK OPPORTUNITIES

AN OWNER'S GUIDE

U.S. DEPARTMENT OF EDUCATION • U.S. DEPARTMENT OF LABOR

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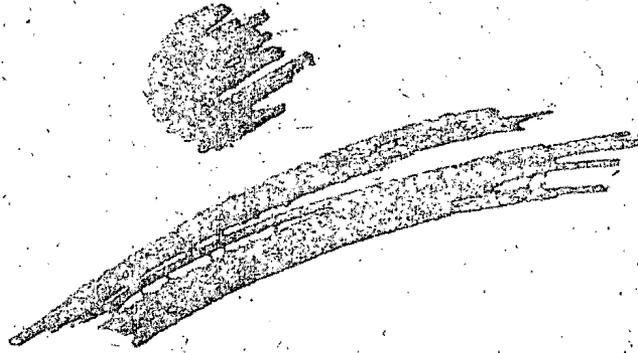
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July 2012 TRANSITIONS  
File



# Bridges

*from school to work*

A project of the Marriott Foundation  
for People with Disabilities

Product also  
from number 250  
mild/severe  
1/2 LD  
Apparatus  
20% MR  
20% ED  
En Power  
10% physical

1 of 6  
Bridges  
Lange

Technical

2000  
School systems --

Remain employed after training -- period  
voluntary site  
(16-21)

Voc-based training sites  
(but not targeted)

Job center  
(now served  
visit)

Employer's assistance  
(10-4)

4 tracks

1 employee (on Brown  
Comm)

Public Safety Center

May 92

Permit Part

Time

9-1)

## **MARRIOTT FOUNDATION FOR PEOPLE WITH DISABILITIES**

The Marriott Foundation for People with Disabilities was established in 1989 by the family of J. Willard Marriott, founder of Marriott Corporation. The Foundation's mission is to foster the employment of young people with disabilities. To achieve this mission, the Foundation developed and operates a transition program, "Bridges....from school to work," which develops paid internships for students in their final year of high school.

In late 1989, the Foundation launched the pilot of the Bridges program in Montgomery County, Maryland, headquarters of Marriott Corporation, which in October 1993 split into two companies, Marriott International, Inc. and Host Marriott Corporation. The program was expanded to Chicago and San Francisco in 1990, Washington, D.C. in 1991 and Los Angeles in 1992. To date, Bridges has placed more than 950 students in internships with some 470 employers. The Foundation's goal is to replicate the program in a number of cities across the United States.

Richard E. Marriott, chairman of Host Marriott Corporation, serves as chairman of the Foundation's board of trustees. The other board members are Dr. I. King Jordan, president of Gallaudet University, and Jay Rochlin, former executive director of the President's Committee on Employment of People with Disabilities.

In each location, the Foundation selects a community-based organization to administer and operate the Bridges program. The local organization serves as a liaison with the school system, employers and other participants. TransCen, Inc. administers the program in Montgomery County, Maryland and Washington, D.C. The University of Illinois at Chicago, San Francisco State University Foundation and The Los Angeles Project With Industry administer Bridges in Chicago, San Francisco and Los Angeles, respectively.

Education, training and support are central to the success of Bridges. To help prepare interns for the workplace, Bridges provides orientation and training for students and their parents. Managers and supervisors attend seminars on employing people with disabilities that address workplace issues such as supervision, communication and discipline. To support the internship, the program employs and trains employer representatives who help businesses identify internship positions, match student interests and capabilities with job requirements, and provide ongoing support to employers and interns.

The Foundation involved a number of nationally-recognized consultants in the development of the Bridges program. Noted for designing training programs for the employment of people with disabilities, Milt Wright and Associates assisted in developing Bridges training components. The Virginia Commonwealth University Rehabilitation Research and Training Center, a widely acknowledged leader in supported-employment training, served as a key advisor during program development.

Local Bridges projects are supported in part by grants from the U.S. Department of Education, Rehabilitation Services Administration; and the U.S. Department of Labor.

## MARRIOTT FOUNDATION FOR PEOPLE WITH DISABILITIES

### Bridges...from school-to-work

The Marriott Foundation for People with Disabilities was established in 1989 to foster the employment of young people with disabilities. The Foundation operates a transition program, "Bridges...from school to work," that develops internships for students with disabilities in their final year of high school. The program is administered in local communities through a community-based organization, under the direction of the Foundation.

The Bridges program has two important purposes: to provide students with job training and work experience that enhance employment potential, and to help local employers gain access to an often overlooked source of employees. Bridges gives students with disabilities the opportunity to learn, grow and succeed through a program that involves employers, schools, students and their parents. Below is a brief overview of roles and responsibilities:

#### The Employer:

- \* Selects managers and supervisors to attend a Foundation-sponsored half-day disability awareness training session.
- \* Actively works with program staff to identify and analyze potential paid internship positions.
- \* Interviews students referred for internships and makes final selection decisions.
- \* Utilizes the program's staff to assist company personnel in orienting, training, supervising, monitoring and evaluating the intern.

**The Community-based Organization:** Administers the local Bridges program under the direction of the Marriott Foundation for People with Disabilities. It hires and supervises employer representatives who:

- \* Work closely with employers to identify potential internship positions and determine job requirements.
- \* Develop appropriate student internship matches based on analysis of worksite/job needs and student interests and abilities.
- \* Assist company personnel in working effectively with intern.
- \* Provide on-site, follow-up support to the employer and student during the internship.
- \* Assist the employer in conducting regular performance appraisals of the intern, including final evaluation at the completion of the internship period.

#### The School System:

- \* Identifies and recommends prospective students with disabilities in their final year of high school for internship positions.
- \* Assists students in applying and interviewing for internships.
- \* Maintains regular contact with employer representatives.
- \* Provides additional support to the intern and his/her family, as needed, and integrates the student's internship experience into the school program.

# **TransCen, Inc.**

June 29, 1994

Stan Herr  
224 Old Executive Office Building  
Washington, D.C. 20500

Dear Stan,

As we discussed, I have made arrangements for us to visit Kirsten Davidson at her work site at the Consumer Product Safety Commission on Wednesday morning, July 20, 1994. I have invited Joanna Clarke of the Montgomery County Disability Resource Division, who I believe you know, to join us as she also has an interest in seeing firsthand the results of effective school to work transition.

I will contact you within the next few days concerning a convenient place to meet and necessary directions. In the meantime, please do not hesitate to contact me if you have any questions.

Thank you for your interest in our work.

Sincerely,



Richard G. Luecking  
President

RGL/klw

# **TransCen, Inc.**

June 27, 1994

Stan Herr  
224 Old Executive Office Building  
Washington, D.C. 20500

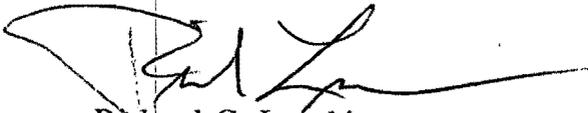
Dear Mr. Herr,

Thank you for your interest in the work of TransCen, Inc. Per our conversation, I am forwarding the last two TransCen Annual Reports and information on the *Bridges* program for background information.

We would be happy to meet with you and/or arrange a tour of work sites where young people with disabilities, including Kirsten Davidson, work as a result of *Bridges* and other transition from school to work projects administered by TransCen.

Please do not hesitate to contact me if you have any questions or desire further information.

Sincerely,



Richard G. Luecking  
President

RGL/klw

Enclosure

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# TransCen, Inc.

# Annual Report

1993

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451 Hungerford Drive  
Suite 700  
Rockville, MD 20850  
(301) 424-2002 VOICE  
(301) 309-2435 TDD  
(301) 251-3762 FAX

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1010 Vermont Avenue, NW  
Suite 817  
Washington, DC 20005  
(202) 628-0239 VOICE  
(202) 628-0311 TDD  
(202) 628-6364 FAX

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*TransCen, Inc.*

ANNUAL  
REPORT

· DECEMBER 1992 ·

TRANSCEN, INC.  
451 HUNGERFORD DRIVE  
SUITE 700  
ROCKVILLE, MARYLAND 20850  
301/424-2002 TEL  
301/251-3762 FAX  
301/309-2435 TDD

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Supervisor

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- labels

- Templates

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- entering skills

conducting company audits

WBE

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Richard Lacey - is - -

George Titson Bridges  
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Tranton - -

Offices - -

Winston  
speech

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Cummer Rental Staff  
(E-W Highway)

office welcome

Ann Brown Chairman

DC  
Mont-Co

[School to work]  
loading way for non-D

Love's job  
SLP

MEMORANDUM TO SECRETARY ROBERT REICH  
SECRETARY RICHARD RILEY  
SECRETARY DONNA SHALALA

FROM: Carol H. Rasco  
Assistant to the President for Domestic Policy

SUBJECT: Transitions from School to Work for People with  
Disabilities

One of the most challenging problems facing young people with disabilities and their families is to transition successfully from school days to workplaces or activity centers. As you know the School to Work Opportunity Act requires that all students, regardless of disability, be eligible for the programs created under this law. The topic of transitions is also relevant to the reauthorization of IDEA (the Individuals with Disabilities Education Act), and questions that arise as to the programs authorized under that Act for young adults. The implementation stage of this act coinciding, it seems timely to have a few meetings with key folks in your departments on this issue. Could you kindly designate 1 or 2 from each department. (if you wish they can be the same folks involved with National disability policy review.

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criteria in each competition  
state applications

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trish mcneil P6(b)(6)  
users amy?

cappner office of voc and adult

doug Ross

8 states ma, me ny nj mi wi ky or.

legislation

Children's Hospital  
300 Longwood Avenue  
Boston, MA 02115  
617-735-6506  
617-735-7940 (fax)  
617-735-6956 (TDD)

Institute for Community Inclusion



# Children's Hospital

Center on Promoting  
Employment: RRTC

Developmental Evaluation  
Center  
617-735-6501

Training and Research  
Institute for People  
with Disabilities

Stanley Herr  
Kennedy Public Policy Fellow  
Room 224  
Old Executive Office Building  
Washington, DC 20500

May 6, 1994

Dear Stan:

I had placed a call into David Braddock but did not reach him today. I will continue to follow-up with him on the issue you brought up. I have enclosed an article relating to transition and some of the policy implications as well as the second article summarizing transition from NICHCY.

For your general information, I am enclosing a copy of the Whole Life Planning Document that we use here at the hospital to assist persons with disabilities in developing a comprehensive plan for themselves. Documents similar to the personal futures planning try to utilize the consumer to the greatest extent possible and those individuals who are most important to him or her in the planning process. As you and I had talked, I think that there are some very specific things we can suggest for Carol in assisting her in developing a more realistic program for her son. Please let me know if there is anything we should do as a follow up to your conversation with her. I look forward to seeing you in the Boston area in the next couple of weeks at the Human Rights Conference for the Department of Mental Retardation.

I will be getting back to you regarding the nature of my conversation with David. I don't believe it should be much of an issue though I will confirm that with David.

Sincerely,

A handwritten signature in cursive script, appearing to read "Bill".

William E. Kiernan, Ph.D.  
Director

WEK/bar  
Enclosure

# Policy Update

Winter 1993

## IDEA: Its Impact on Transition Regulations

In October 1990, Congress passed and former President Bush signed into law the Individuals with Disabilities Education Act (IDEA - P.L. 101-476). IDEA serves to amend the Education of the Handicapped Act Amendments. Final regulations for IDEA were published in the September 29, 1992, Federal Register (Vol. 57, No. 189, pp. 44794-44852) and revised in the October 27, 1992 edition (Vol. 57, No. 208, 48694-48704). Several sections of the regulations pertain to the transition of students from school to adult life. Four important requirements of IDEA concern: (1) notification, (2) participation in meetings, (3) content of the IEP, and (4) agency responsibility. The purpose of this policy brief is to present the regulatory language and describe potential implications in each of these four areas.

### ■ Notification (Section 300.345)

With regard to parent notification of the IEP meeting, the regulations state:

- (2) If a purpose of a meeting is a consideration of transition services for a student, the notice must also—
- (i) Indicate this purpose;
  - (ii) Indicate that the agency will invite the student; and
  - (iii) Identify any other agency that will be invited to send a representative.

It is likely that this change was intended to ensure that parents are informed in advance that transition issues will be discussed at the IEP meeting, thus providing them with the opportunity to prepare for the discussion. Preparation might include thinking about future goals for their son or daughter. They may also want to invite friends, community members or others who could provide support for their child as they move into adult life. By knowing that their son or daughter will be invited, parents have an opportunity to discuss transition goals and activities with their child, and to ask school personnel to utilize strategies for maximizing the student's participation in the IEP meeting. With an understanding of the agencies to be invited, parents can request that additional or alternate agencies be included. They may also want to request information about the services and policies of invited agencies.

### ■ Participation in Meetings (Section 300.344)

IDEA mandates that for students, beginning no later than 16 years of age (and at a younger age, if determined appropriate), one of the purposes of the annual meeting will always be the planning of transition services, since transition services are a required component of the IEP. In IEP meetings where transition will be discussed, IDEA expands participation to include:

- (i) The student; and
- (ii) A representative of any other agency that is likely to be responsible for providing or paying for transition services.

### Student Participation

The mandate to involve students in the discussion of their future goals and plans reflects the values of self-determination, enablement, and shared responsibility. It may, however, challenge parents and professionals to change procedures and develop strategies to ensure that students are given an active and powerful voice in the planning of their future. For many students this will mean that well before the IEP meeting, both in and out of school, they must participate in activities designed to enhance their knowledge base and decision-making and communication skills. The law goes on to state:

- (2) If the student does not attend, the public agency shall take other steps to ensure that the student's preferences and interests are considered.

It is difficult to imagine conditions under which a student would not attend her or his IEP meeting, other than personal choice. In those rare instances, steps should be taken to

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The National Transition Network is a collaboration of the University of Minnesota; University of Vermont; Colorado State University; University of Arkansas; University of Illinois, Urbana-Champaign; Technical Assistance for Parent Programs; and PACER Center. Its headquarters are at the Institute on Community Integration (UAP), University of Minnesota, Pattee hall, 150 Pillsbury Dr. SE, Minneapolis, MN 55455, (612) 626-8200.

collect information from the student and informed family members, friends, and professionals, and to present that information at the meeting. In these situations, it is useful to have advocates or representatives of the student in attendance at the IEP meeting to ensure that the needs and preferences of the student are considered.

### Agency Participation

The requirement to involve agencies responsible for providing or paying for services reflects the values of long-term, child-centered planning; coordination; and shared responsibility. It places responsibility on school personnel to become knowledgeable about the services and policies of community agencies. The agencies, in turn, should expand their role to include interaction with students who are still in school. These agencies might include: vocational rehabilitation, recreation, employment and training, mental health, mental retardation/developmental disabilities, social security, housing, and others relevant to the individual needs and preferences of the student. The regulations further state:

*(3) If an agency invited to send a representative does not do so, the public agency shall take other steps to obtain the participation of the other agency in the planning of any transition services.*

Although not specified in the law, these steps might include, forwarding a copy of the IEP to the agency (with parent and student approval), arranging for a subsequent IEP meeting to discuss transition specific issues, involving advocacy groups, maintaining contact with the agency to promote involvement, and encouraging parents and students to initiate contact and request involvement.

### ■ The Content of the IEP (Section 300.346)

According to IDEA:

*(1) The IEP for each student, beginning no later than age 16 (and at a younger age, if determined appropriate), must include a statement of transition services as defined in Section 300.18, including, if appropriate, a statement of each public agency's and each participating agency's responsibilities or linkages, or both, before the student leaves the school setting.*

Although the statute does not mandate transition services for all students beginning at 14 or younger, the provision of these services could have a significant positive effect on the employment and independent living outcomes for many of those students in the future, especially for students who are at risk for dropping out. With respect to the provision of transition services to students younger than age 16, the Report of the House Committee on Education and Labor on P.L. 101-476 included the following statement:

*Although this language leaves the final determination of when to initiate transition services for students under age 16 to the IEP process, it nevertheless makes clear that Congress expects consideration to be given to the need for transition services for some students by age 14 or younger. The committee encourages that approach because of their concern that age 16 may be too late for many students, particularly those students at risk of dropping out of school and those with the most severe disabilities. Even for those students who stay in school until age 18, many will need more than two years of transitional services. Students with disabilities are now dropping out of school before age 16, feeling that the education system has little to offer them. Initiating services at a younger age will be critical (House Report No. 101-544, 10, (1990)).*

Section 300.18 states:

*(a) As used in this part, "transition services" means a coordinated set of activities for a student, designed within an outcome oriented process that promotes movement from school to post-school activities, including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adults services, independent living, or community participation.*

*(b) The coordinated set of activities described in paragraph (a) of this section must:*

- (1) Be based on the individual student's needs, taking into account the student's preferences and interests; and*
- (2) Include (i) instruction, (ii) community experiences, (iii) the development of employment and other post-school adult living objectives, and (iv) if appropriate, acquisition of daily living skills and functional vocational evaluation.*

At a minimum, the IEP team must now address each of the areas including instruction, community experiences, and development of employment and other post-school adult living objectives. In most cases, each of the four areas, and possibly some others, will be included in students' IEPs. However, if the IEP team determines that no services are needed within any one of the four designated areas, a statement to that effect and the basis upon which that decision was made must be included in the IEP. This requirement is designed to ensure that the IEP team and the resulting IEP addresses *all* areas that are critical to successful postschool outcomes for an individual student. Examples of successful outcomes are employment, participation in postsecondary education, meaningful community involvement, appropriate housing, and belonging to a social network.

Transition services may be special education, if they are provided as specially designed instruction, or related services, if they are required to assist a student to benefit from special education. They may be provided by the education agency, or as we will see in the next section, they may be provided by agencies outside the school. In either case, they should be written into the IEP and the responsible agency noted.

### ■ Agency Responsibilities (Section 300.347)

Given the complexity and long term nature of transition, it is clear that neither families, schools, adult service providers, state agencies, nor post-secondary institutions can carry the entire fiscal, programmatic, or planning responsibility. As such, IDEA seeks to involve the student, family, school, and outside agencies in the planning process to increase the likelihood of smooth transitions from school to other service systems and postschool settings.

In addition to inviting representatives of outside agencies to the IEP meeting when transition is being discussed, IDEA states the IEP should contain statements of each public and participating agency's responsibilities or linkage (or both) before the student leaves the school setting. This section should also include a commitment by the participating agency to meet the financial responsibility associated with provision of services. This is most important if a state or local agency other than the school is responsible for providing or paying for needed services.

To further elaborate on the shared responsibility for transition services, Section 300.347(a)(b)(c) incorporates a statutory provision:

*(a) If a participating agency fails to provide agreed upon transition services contained in the IEP of a student with a disability, the public agency responsible for the student's education shall, as soon as possible, initiate a meeting for the purpose of identifying alternative strategies to meet the transition objectives and if necessary, revising the student's IEP.*

*(b) Nothing in this part relieves any participating agency, including the state vocational rehabilitation agency, of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet the eligibility criteria of that agency.*

The intent of this section is to ensure that the public agency responsible for the student's education will take necessary steps to see that each student with a disability receives needed transition services. In this case, a participating agency is defined as a state or local agency, other than the public agency responsible for the student's education, that is financially and legally responsible for providing transition services to the student (Section 300.340). While the intent seems clear, there

remain procedural and definitional questions that pertain to the nature of alternative strategies, the time limits for reconvening the IEP team, and the responsibility of the educational agency if other agencies fail to provide agreed upon services.

### Alternative Strategies

Alternative strategies may be able to be identified without changing the student's IEP. In other instances, the IEP team may decide to revise the IEP, changing goals, short term objectives, timelines, or statements about agency responsibility. For example, a student graduates in May at age 19 and begins receiving postschool supported employment services specified on the IEP. The following September those services are terminated because of budget cuts. In October, the IEP team reconvenes and decides that because the former student has not reached the age of 22 and is in need of transition services as specified on the IEP, the educational agency will provide supported employment services through its existing employment program. The team also identified other agencies that can provide the necessary supported employment services and makes plans for accessing the services from the other agencies. In another scenario, a student's IEP specifies that a community residential placement is needed within the next three months. If a community residence is not accessed by that time, the team would meet again to discuss the delay and to ascertain the status of access to service. It may be that waiting lists indicate a six month wait, but the likelihood of accessing services is high. In that case, the IEP team may decide to lengthen the timeline and meet in another three months to discuss progress. If the indication is that a community residence is not a likely possibility for this student due to lack of availability, eligibility, or other reasons, the team may try to come up with other strategies to achieve the same goal. These strategies may include creative use of social security and other funds to purchase or rent housing, pooling resources of young adults with similar needs (both with and without disabilities), or eliciting the assistance of advocacy or lobbying groups.

The provisions of Section 300.347 clearly do not imply that the burden for services, programs, or financial responsibility falls solely on the educational agency when things do not turn out as planned. By giving parents and students a means to re-engage with the planning team when things go wrong, the provision seeks to prevent students "falling through the cracks" with no place to go for assistance and advocacy. Ingenuity, creativity, and a willingness to jointly seek alternative solutions are needed when initial plans or strategies fail to materialize. The strength of this provision relies on the existence of local or state interagency agreements that clearly delineate the financial and legal responsibilities of agencies involved in transition services. Without such agreements, the reconvention process may be ineffectual.

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## ■ Time Limits for Reconvening the IEP Team

There are no specific time limits stated in the law or its regulations regarding the reconvening of the IEP team. A related response is located in the Appendix of the September 29, 1992, Federal Register (p. 44848):

*Part B of the Act neither requires nor prohibits the provision of service to a student after the student has completed the State's graduation requirements. Thus, if a student is still within the eligible age range for FAPE (Free Appropriate Public Education) within the State, the State, at its discretion, could continue to provide needed transition services to the student and use the funds under this part to pay for the transition services, or contribute to the cost of those services through a shared cost arrangement with another agency—provided that all applicable requirements of this part are met.*

Legal decisions and state legislation will probably soon define the time limits for reconvention, but the most literal interpretation at this point in time is that reconvention rights could continue as long as FAPE eligibility remains.

## ■ Conclusion

The above discussion and many of our examples in this update are based on effective practices observed in localities and states throughout the nation. These practices should not necessarily be interpreted as required by law. We encourage individual state education agencies, in collaboration with other state and local organizations and parent and consumer groups, to actively engage in discussions regarding these and other provisions of the Individuals with Disabilities Education Act (IDEA - P.L. 101-476) addressing transition.

*Policy Update* is published by the National Transition Network (NTN). The National Transition Network is funded by Cooperative Agreement H158G20002 from the Office of Special Education and Rehabilitative Services, U.S. Department of Education. Additional copies of this publication are available through the National Transition Network, Institute on Community Integration, University of Minnesota, 6 Pattee Hall, 150 Pillsbury Drive SE, Minneapolis, MN 55455 • (612) 626-8200. Upon request, this publication will be made available in alternative formats.

*Collaborators of the National Transition Network are equal opportunity employers and educators.*

---

National Transition Network  
Institute on Community Integration  
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Pattee Hall  
150 Pillsbury Drive S.E.  
Minneapolis, MN 55455

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## Transition Services in the IEP

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Since the passage of the *Education for All Handicapped Children Act (EHA)*, Public Law 94-142, in 1975, Individualized Education Programs (IEP) have been required for all children and youth with disabilities found eligible for special education. The EHA has required that each child's IEP include statements describing the student's educational placement, educational activities and content areas to be addressed throughout the school year, related services to be provided, timelines and persons responsible for implementing activities, and how student progress will be evaluated. With the newest amendments to the EHA — now titled *Individuals with Disabilities Education Act, or IDEA (Public Law 101-476)*—a new component has been added to the IEP. Now, the IEP must also specify the transition services that the student with disabilities needs in order to prepare for life after exiting the public school system. These services must be focused upon helping the student with disabilities to achieve real-life outcomes such as employment, postsecondary education, independent living, adult services, and community participation. The IDEA states that transition services must be included in the educational plans of students who are 16 years and older, or, if appropriate, at a younger age.

This *TRANSITION SUMMARY* takes a closer look at the definitions, mandates, and structure of transition services. Specifically, the first half of this *TRANSITION SUMMARY* addresses questions such as: What are transition services? When must school districts begin providing transition services? Who will determine what services are needed? How does the team determine what services are needed? Who will provide the services? and Where will the services be provided? The second half of this document examines (a) recommended transition components to be included in the IEP, including an overview of current national trends regarding transition goal-setting; and (b) assessment issues surrounding transition planning in the IEP. Useful resources for parents and professionals are listed at the end of this *TRANSITION SUMMARY*.

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## Transition Summary

National Information Center for Children  
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Washington, DC

Since the passage of the *Education for All Handicapped Children Act (EHA)*, Public Law 94-142, in 1975, Individualized Education Programs (IEP) have been a requirement of law for all children and youth with disabilities found eligible for special education. Each student's IEP must list goals and objectives for educational activities and include information about the student's assessment and educational placement, the instructional content areas to be addressed throughout the year, the timelines and persons responsible for activities corresponding to the goals and objectives, how student progress will be evaluated, and the related services that each student needs in order to benefit from his or her special education. With the newest amendments to the EHA — now entitled the *Individuals with Disabilities Education Act, or IDEA (Public Law 101-476)* — a new component has been added to the IEP. Beginning no later than age 16, each student now must also have included in the IEP a statement of the *transition services* that he or she needs in order to prepare for such postschool outcomes as employment, postsecondary education, adult services, independent living, and community participation [*The Individuals with Disabilities Education Act, 20 U.S.C. Chapter 33, Section 1401(a)(19)*]. When appropriate, these statements must be also included in the IEPs of younger students [*34 Code of Federal Regulations (CFR) § 300.346(b)(1)*].

The new definition of "Content of Individualized Education Program" is presented in the box on the next page. Clearly, for students aged 16 or older and,

in many cases, for students who are younger, the contents of the IEP have expanded, and this will broaden the focus of IEPs and affect how they are developed. Traditionally, the IEP has been designed for a maximum of one year, breaking annual goals into short-term objectives. With the addition of transition services, the IEP becomes longer term, with objectives spanning across several years. For the first time, planning is oriented towards life after high school, with plans including adult services agencies and community agencies, where applicable. This is an enormous step forward in the concept of preparing students educationally, and will require a great deal of insight, foresight, and planning on the part of students, parents, and school and other agency professionals.

This *TRANSITION SUMMARY* has been developed to assist IEP teams in this endeavor and, to that end, will examine transition services in detail. First, in order to provide a good grounding as to the meaning of these services, we will take a thorough look at how transition services are defined within federal law. The second half of this document will examine how federal law might be translated into educational action; this includes looking closely at transition components to include in the IEP, current national trends regarding setting goals for transition, and the importance of assessment in helping each student plan for transition.

# Transition Services as Defined by the IDEA

The rules and regulations for the IDEA, released in late 1992 (see U.S. Department of Education, 1992a, 1992b), define transition services as:

(a)...a coordinated set of activities for a student, designed within an outcome-oriented process, that promotes movement from school to post-school activities, including postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.

(b) The coordinated set of activities...must —

(1) Be based upon the individual student's needs, taking into account the student's preferences and interests; and

(2) Include --

(i) Instruction;

(ii) Community experiences;

(iii) The development of employment and other post-school adult living objectives; and

(iv) If appropriate, acquisition of daily living skills and functional vocational evaluation. (*The Individuals with Disabilities Education Act*, P.L. 101-476, 34 CFR § 300.18)

To facilitate discussion of this definition, it may be useful to pose a number

of questions about the nature of developing and including transition service statements in students' IEPs and also about providing those services. These questions are:

- *What* are transition services?
- *When* must school districts begin providing transition services to students?
- *Who* will determine what services are needed?
- *How* does the team determine what services are needed?
- *Who* will provide the transition services?
- *Where* will the services be provided?

## Content of Individualized Education Program

(a) *General.* The IEP for each child must include—

- (1) A statement of the child's present levels of educational performance;
- (2) A statement of annual goals, including short-term instructional objectives;
- (3) A statement of the specific special education and related services to be provided to the child and the extent that the child will be able to participate in regular educational programs;
- (4) The projected dates for initiation of services and the anticipated duration of the services; and
- (5) Appropriate objective criteria and evaluation procedures and schedules for determining, on at least an annual basis, whether the short term instructional objectives are being achieved.

(b) *Transition services.* (1) The IEP for each student, beginning no later than age 16 (and at a younger age, if determined appropriate), must include a statement of the needed transition services as defined in § 300.18, including, if appropriate, a statement of each public agency's and each participating agency's responsibilities or linkages, or both, before the student leaves the school setting.

(2) If the IEP team determines that services are not needed in one or more of the areas specified in § 300.18(b)(2)(i) through (b)(2)(iii), the IEP must include a statement to that effect and the basis upon which the determination was made.

*Individuals with Disabilities Education Act*, Public Law 101-476  
34 *Code of Federal Regulations* § 300.346  
September 29, 1992

## What Are Transition Services?

To understand what transition services are and what they mean to students with disabilities, it is important to look at the definition step by step, isolating key phrases and discussing their meaning, *and* also to view the definition more globally, looking at the Congressional intent for defining transition services in this way.

*Post-school Activities.* First and foremost, transition services are designed to help students with disabilities move from public school into post-school activities. What post-school activities might a student become involved in and, thus, need to prepare for? These are listed in the very first part of the definition: postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.

This scope of activities is necessarily broad, given the many domains of adult life and the problems that far too many former special education students have reported encountering in their postschool life. Difficulties in finding or keeping

employment, poor integration into the community, lack of a social network, and lack of independence are among the difficulties these students have experienced (Fardig, Algozzine, Schwartz, Hensel, & Westling, 1985; Hasazi, Gordon, & Roe, 1985; Mithaug & Horiuchi, 1983). No less serious are their difficulties in gaining access to appropriate adult services and postsecondary education and training programs (National Council on Disability, 1989; Wagner, 1989). Clearly intended as a response to the disturbing findings of research, the list of post-school activities contained in the IDEA requires those involved in transition planning to address, not just the employment future of students with disabilities, but also their future needs within the much broader focus of life within the community.

**Coordinated Set of Activities.** To prepare a student for such post-school activities, the transition services must be a "coordinated set of activities." What is meant by *coordinated*? According to the Secretary of Education, this term means both "(1) the linkage between each of the component activities that comprise transition services, and (2) the interrelationship between the various agencies that are involved in the provision of transition services to a student" (U.S. Department of Education, 1992a, p. 44644). Thus, the various transition activities must complement and be coordinated with each other, and the different agencies responsible for providing the services must do the same, making sure that the services they provide to the student meet, in a coordinated, nonduplicating fashion, his or her transition needs. Because the transition process relies on the involvement of many individuals and many service providers, this coordination of effort is essential (DeStefano & Wermuth, 1992).

**Outcome-oriented Process.** The coordinated set of activities must also be designed within an "outcome-oriented process." The term *outcome* refers to the results, or intended effect, of the transition activities on the student (U.S. Department of Education, 1992a, p. 44644). This is one of the most critical intents behind IDEA's requirements regarding transition services.

In the report submitted by the Committee on Education and Labor to accompany and explain the Act, Congress observes that individuals with disabilities "move from school to adult life with varying degrees of success" (U.S. House of Representatives, 1990, June 18, p. 9). Thus, "this definition

instruction will be used in providing a student's transition services? When will skill development require that the student have community-based experiences? What objectives might be written to guide preparing the student for the adult living domains he or she will experience after

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***"Because the transition process relies on the involvement of many individuals and many service providers, coordination of effort is essential."***

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of 'transition services' is aimed at preparing students (soon to leave school) for employment, postsecondary education, vocational training, continuing and adult education, adult services, independent living, or community participation" (p. 9-10). These are the outcomes that must be considered when planning what transition services each student requires; they are also exactly the same as the "post-school activities" which are listed in the definition of transition services and which, over the past decade, have proven problematic to many special education students exiting the school system. Appropriately addressing these postsecondary domains during the public school years, Congress feels, will enhance "a young adult's chances to achieve an adequate level of self-care, independence, self-sufficiency, and community integration" (p. 10).

**Areas of Transition Activities.** While it may not initially seem so, a critical part of the definition of transition services is found in (b)(2)(i) through (b)(2)(iii). This part states that the coordinated set of transition activities must include:

- instruction;
- community experiences; and
- developing employment and other post-school adult living objectives.

If appropriate, activities would also include acquisition of daily living skills and functional vocational evaluation [§ 300.18(b)(2)(iv)].

It is important to understand that *these* are the transition service areas that each IEP team must address in its transition discussions (see U.S. Department of Education, 1992a, p. 44644). What

leaving school? Does the student need to acquire daily living skills? Is functional vocational evaluation necessary for determining and providing appropriate transition services to the student?

Thus, for every post-school activity area (e.g., postsecondary education, employment, adult service providers, etc.), the IEP team would need to determine what objectives need to be written into the IEP, given the skills and knowledge the student needs to acquire in that area, what type of instruction should be used as a means of preparing the student for that post-school environment, and what community-based experiences would be appropriate. (More will be said about developing objectives and about using community-based experiences later in this document.) The question of whether the student needs to acquire daily living skills and/or participate in a functional vocational evaluation must also be considered; these services, unlike the first three, are provided only when appropriate to the needs of the student.

## **When Must Services Be Provided?**

The second mandate within IDEA that will affect IEP development of students is the law's statement of *when*, at the latest, the provision of transition services must begin. According to IDEA:

...The IEP for each student, beginning no later than age 16 (and at a younger age, if determined appropriate), must include a statement of the needed transition services... [§ 300.346(b)(1)]

The way in which this age requirement is stated gives school districts some latitude in deciding when to begin providing transition services. At a minimum, schools *must* provide services to students who are age 16. As the regulations state in a note, "For all students who are 16 years or older, one of the purposes of the annual [IEP] meeting will always be the planning of transition services, since transition services are a required component of the IEP for these students" (§300.344, Note 2). However, a school may provide transition services to younger students, when their needs deem it appropriate. This may be particularly important for students with severe disabilities or for those who are at risk of dropping out of school before age 16. Considering the fact that 36% of students with disabilities do, in fact, drop out of school (Wagner & Shaver, 1989), the need clearly exists to provide transition services to many students who have not yet turned 16 years old.

Note 3 in this section of the regulations addresses this last point directly by pointing out that Section 602(a)(2) of the Individuals with Disabilities Education Act permits transition services to students beginning at age 14 or younger, when deemed appropriate. Note 3 goes on to state:

Although the statute does not mandate transition services for all students beginning at age 14 or younger, the provision of these services could have a significantly positive effect on the employment and independent living outcomes for many of these students in the future, especially for students who are likely to drop out before age 16.

Note 3 (in § 300.344) goes on to quote from the Report of the House Committee on Education and Labor, which was written to accompany and explain the IDEA:

Although this language leaves the final determination of when to initiate transition services for students under age 16 to the IEP process, it nonetheless makes it clear that Congress expects

consideration to be given to the need for transition services for some students by age 14 or younger. The Committee encourages this approach because of their concern that age 16 may be too late for many students, particularly those at risk of dropping out of school and those with the most severe disabilities. Even for those students who will stay in school until age 18, many will need more than two years of transitional services. Students with disabilities are now dropping out of school before age 16, feeling that the education system has little to offer them. Initiating services at a younger age will be critical (House Report 101-544, 10 (1990)).

In reference to students with severe cognitive and multiple disabilities, this House Report goes on to observe that, before these students "age out" of the public school system, "they must have time to develop the essential skills which will be critical for them throughout their lives. Transition services for this population must be considered, planned, and provided over a multi-year time period" (U.S. House of Representatives, 1990, June 18, p. 10). Thus, Congress makes its intent clear that, while providing transition services to students with disabilities under the age of 16 is not a *requirement* of the law, it is still highly desirable for many individuals, particularly those with severe disabilities and those at risk of dropping out of school.

### Who Determines What Services Are Needed?

The regulations of IDEA are very clear as to what individuals should participate in determining the transition services a student needs and what these services will entail. In addition to the usual participants at an IEP meeting (e.g., the student's classroom teacher, a school representative, and the parents), the public agency is required to invite to any meeting where transition services will be discussed:

- (i) The student; and
- (ii) A representative of any other agency that is likely to be responsible for providing or paying for transition services. [§ 300.344(c)(1)]

*The Student.* It is particularly important that the student be involved in the process. As can be seen above, the regulations specifically state that the student must be invited to attend the IEP meeting. This includes students who are younger than 16. If transition services for a younger student are discussed at a meeting where the student is not present, no decisions regarding transition services may be made without holding a subsequent IEP meeting for that purpose and inviting the student to the meeting (§ 300.344, Note 2).

Furthermore, the coordinated set of activities developed "must be based on the individual student's needs, taking into account the student's preferences and interests" [§ 300.18(b)(1)]. If the student does not attend, then the school must take "other steps to ensure that the student's preferences and interests are considered" [§ 300.344(c)(2)]. In most cases, the person most able to determine and explain the student's preferences and interests is, of course, the student.

However, perhaps the most important reason to involve the student in transition planning goes beyond what is required by law. The critical issue here is one of *self-determination*. "Self-determination, which includes self-actualization, assertiveness, creativity, pride, and self-advocacy, must be part of the career development process that begins in early childhood and continues throughout adult life" (Ward, 1992, p. 389). It is vital that educational systems, parents, and other service providers do everything they can to facilitate the development of each student's self-determination skills, for these are at the core of the student developing the ability to manage his or her own life. The IEP meeting is one critically important, and appropriate, place for the student to have an active, self-determining role. What is being discussed and planned in the IEP meeting, after all, are services that will directly affect the student's *life*, now and in the future.

To facilitate the student's participation in the transition process, however, many students may need to be informed about the nature of their role in the IEP meeting and afterwards — specifically, what their participation entails. Expressing personal preferences and desires and advocating for themselves, particularly in the presence of "authority figures" such as administrators, teachers, and parents, may be a new role for students, one for which they need guidance and feedback. Parents can help prepare the young person to participate in IEP meetings, talking about its purpose, describing what goes on and who typically attends, and discussing transition issues with their child before (and after) the meeting occurs. Some students may benefit from rehearsing certain aspects of the meeting (e.g., greetings, appropriate ways to express preferences or suggest alternatives). If the student requires any accommodation, such as an interpreter or an augmentative communication device, this should be arranged (by the student, parents, or teacher) in advance of the meeting, to remove any artificial obstacles to the student's participation. Ultimately, "the goal is for students to assume control (with appropriate levels of support) over their transition program and identify and manage its various components" (Ward, 1992, p. 389).

**Parents.** Parents must also be invited to any meeting where transition services will be discussed, and they must be informed that that is the purpose of the meeting. The school must also indicate to the parents that the student will be invited and identify any other agency that will be invited to participate [§ 300.345(b)(2)].

**Participating Agencies.** Agencies that would typically be invited to participate in discussing and determining what transition services a student should receive would be those agencies that share responsibility in some way for providing or paying for those services. Thus, the agency responsible for providing vocational rehabilitation services might be invited to send a representative. If an agency is invited to send a representative to a meeting and does not do so, the school "shall take other steps to obtain the participation of the other agency in the

planning of any transition services" [§ 300.344(c)(3)].

Together, this group of people — the student, the student's teacher(s), a representative of the school, the parents, representatives from outside agencies that will be involved in planning or providing

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*"...the (transition) plan should address the areas in which the student most needs to increase his or her knowledge and skills in order to prepare for transition."*

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transition services, and any other invited participants — will discuss and determine what transition services the student needs.

### **How Does the Team Determine What Services Are Needed?**

The IDEA does not specifically identify how the IEP team determines what transition services a student needs, but since transition services are included as a component of the IEP, the process traditionally used to identify other needed educational or related services would apply. This process typically involves evaluation using a variety of measures, such as observations, anecdotal information, and testing (standardized and/or performance). (See page 15 for a more detailed discussion of assessment issues.) Obviously, this evaluation process would focus upon transition issues (employment, postsecondary education, adult services, independent living, and community participation), asking questions such as:

- What competencies and knowledge does the student need in order to move successfully into employment (postsecondary education, adult services, independent living, community participation, etc.)?
- What skills and knowledge does the student have at present in each of these areas? Is functional vocational evaluation necessary to determine the student's level of skills?
- What knowledge and skills does the student still need to acquire?

This information will be critical in determining appropriate transition services for the student and in developing the specific transition plan. In particular, the plan should address the areas in which the student most needs to increase his or her knowledge and skills in order to prepare for transition.

It must be pointed out that, although the regulations state unequivocally that "the coordinated set of activities *must*...include instruction, community experiences, and the development of employment and other adult living objectives" (§ 300.18(b), emphasis added), there may be occasions when certain of these services are not provided to a student. This possibility arises from § 300.346(b)(2), the section of the regulations defining the contents of the IEP. This section states:

If the IEP team determines that services are not needed in one or more of the areas specified in § 300.18(b)(2)(i) through (b)(2)(iii), the IEP must include a statement to that effect and the basis upon which the determination was made. [§ 300.346(b)(2)]

Presumably, this statement is included to acknowledge that students differ from each other in terms of the nature and severity of their disability, personality, abilities, cultural values, and interests. Therefore, the type and amount of transition services needed may also differ from student to student. Just as special education and related services provided to students differ depending upon student need, so, too, will transition services vary. As with other educational services provided to students with disabilities, then, transition services will be individualized to fit the person's unique needs.

Thus, an IEP team may legitimately decide that a student does not need transition

services in one (or more) area(s). For example, a student might be planning on studying at a local university. To prepare for transition to this environment, he or she may need to develop objectives related to the university's application process and to investigate what accommodations the university makes available to students with disabilities and which accommodations he or she will need, if any. Some instruction may be necessary to help the student address these objectives, but community-based experiences may not be necessary. To be in compliance with the law, the IEP for this student must then state that services in community-based experiences will not be provided and give the reason(s) why the team feels that the services are not needed. However, "since it is part of the IEP, the IEP team must reconsider its determination at least annually" (§ 300.346, Note 2). Presumably, this latter requirement is intended to ensure that when new information about the student becomes available or the student's plans change, appropriate changes are made in the transition services he or she needs in order to prepare for life after high school.

Hopefully, the regulation permitting variability in the type and amount of transition services will not also permit school districts to *avoid* providing services that are, in fact, needed by students. Students and parents should remember that the regulations require a *team* approach to making decisions about which services are needed, and that they are integral members of the team. In some cases, advocating for needed transition services may be an important part of obtaining the services. For disputes that cannot be settled through open discussion, compromise, or mediation, students and parents have recourse through the law's procedural safeguards (e.g., due process hearings). These safeguards are the same as those for resolving conflicts over special education and related services, for, indeed, transition services are an expansion of the IEP process and can be provided either as special education or as a related service (§ 300.18, Note).

Once the team has reached agreement on the transition areas that will be important for the student to emphasize,

actually developing statements within the IEP may be different from the process used for detailing special education and related services. The most important difference is that planning for transition must look several years into the future, proactively addressing questions such as:

- How many years of public school does the student have remaining?
- Given the student's present level of performance and where he or she needs to be by the end of high school, what transition services are needed this year?
- What services are needed in each remaining year?

Especially important to the goal-setting process is the concept that skills are learned along a progressive continuum of difficulty. This means that new skills should build upon the skills mastered previously and that addressing more advanced skills and knowledge can often be deferred to transition plans made in subsequent years.

A second difference is that the plan does not *necessarily* have to state the transition services in terms of annual goals and short-term objectives. Interestingly, the rules and regulations of the IDEA do not specifically require — nor do they specifically exclude — the use of goal and objective statements for transition services (such statements *are* required for other educational services). This is because "the IEP content requirements in §300.346(a) do not appear to be appropriate for all types of transition services" (U.S. Department of Education, 1992a, p. 44847). (For the IEP content requirements found in 300.346(a), see the regulations for "Content of Individualized Education Program" presented in the box on page 2.) However, it is certainly good educational practice to plan many of the transition services using annual goal statements and short-term objectives. Such statements allow school districts, parents, and students to see clearly where they are going and to measure progress.

### Who Provides the Services?

The IDEA requires that, when appropriate, the IEP of each student planning for transition should also include "...a

statement of each public agency's and each participating agency's responsibilities or linkages, or both, before the student leaves the school setting" (§ 300.346(b)(1)).

The public agency, typically the school, is primarily responsible for the provision of transition services. According to the law, the school's responsibilities in this regard — what services it will provide — must be stated clearly in the student's IEP. The responsibilities of any other participating agency (e.g., vocational rehabilitation) must also be stated in the IEP, including a statement of the agency's "commitment...to meet any financial responsibility it may have in the provision of transition services" (§ 300.346, Note 1). Linkages between agencies, such as cooperative agreements to provide transition services, must also be stipulated.

According to the report accompanying and explaining the IDEA, this latter requirement of the IDEA signals the Congress' intention that "the preparation of students for movement from school to post-school environments not be the sole responsibility of public education. The purpose of the...statement pertaining to interagency linkages is to communicate shared responsibility" (U.S. House of Representatives, 1990, June 18, p. 12). This includes sharing (a) financial responsibility, in that "the local education agency should not bear the costs of transition services which according to the IEP would have been borne by another participating agency" (p. 11), and (b) personnel resources and expertise. Many of the adult agencies with whom responsibility might be shared have staff with considerable expertise in transition issues — for example, rehabilitation counselors from the local rehabilitation agency. Operating within an interagency cooperative agreement, a rehabilitation counselor might become involved in helping students with disabilities plan for transition. As the report of the Committee on Education and Labor observes:

...the rehabilitation counseling discipline embodies the wide range of knowledge needed for successful school to work transition, i.e., vocational implications of

disability, career development, career counseling for individuals with disabilities, job placement, and job modification. Therefore, rehabilitation counselors are professionally prepared to provide the appropriate counseling as well as to coordinate the services of the special education disciplines, adult services providers, and post-secondary education agencies to ensure effective, planned transition services for students with disabilities. (U.S. House of Representatives, 1990, June 18, p. 7-8)

The Committee on Education and Labor states very clearly, however, that "the responsibility for developing and implementing interagency participation is an administrative-level responsibility and should not be delegated to the already heavily-burdened teacher" (U.S. House of Representatives, 1990, June 18, p. 11). Each State Plan for special education sets forth policies and procedures for developing and implementing interagency agreements between the State Education Agency (SEA) and all other State and local agencies that provide or pay for services for children with disabilities (34 CFR § 300.152). Thus, developing and implementing interagency agreements is a State-level or district-level responsibility, not one that falls to the classroom teacher.

Establishing such interagency linkages can be of enormous benefit to students planning for transition. This is because, as students with disabilities leave the public school system, their entitlement to educational, vocational, and other services ends. In the place of one relatively organized service provider (the school system), there may now be a confusing array of many service providers (i.e., the local vocational rehabilitation agency, the state department of mental health, developmental disabilities councils, community services boards, the federal social security system, and so on). Individuals with disabilities who have left school become solely responsible for identifying where to obtain the services they need and for demonstrating their

eligibility to receive the services. Therefore, for many students with disabilities, identifying relevant adult service providers, establishing eligibility to receive adult services, and having interagency responsibilities and linkages stated in the IEP, all while still in school, "will be

then matching the classroom experience with activities within the community (e.g., actually taking the bus). More will be said later in this document about the importance of providing students in transition with community-based experiences.

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*"(Federal) regulations make it clear that transition services should be provided across a variety of locations, including within the community..."*

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necessary to ensure a smooth transition from school to adult life" (U.S. House of Representatives, 1990, June 18, p. 11).

### Where Will Transition Services Be Provided?

The IDEA does not enumerate where transition services should be provided. However, it is important to note that the definition of transition services states that the coordinated set of activities that the IEP team designs to promote the student's movement to post-school life must include:

- (i) Instruction;
- (ii) Community experiences;
- (iii) The development of employment and other post-school adult living objectives; and
- (iv) If appropriate, acquisition of daily living skills and functional vocational evaluation. [§ 300.18(b)(2)]

These requirements make it clear that transition services should be provided across a variety of locations, including within the community, as befitting the needs of the student and the particular skill or knowledge to be acquired. For example, the IEP team might determine that the student needs to learn how to operate within the community. One important facet of this general goal might involve knowing how to ride the bus. Transition services, then, might address the student's need to ride the bus by developing learning experiences within the classroom (e.g., instruction in how to identify the proper bus and pay for the ride) and

### Conclusions, Ramifications, and Other Observations

*Expanding the IEP.* Adding transition services to the IEP takes advantage of an already established process for deciding upon and delivering educational services to students with disabilities. The IEP process under the IDEA is much the same as under the EHA, in that a multidisciplinary team — including the parents and, where appropriate, the student — meets to discuss and set appropriate goals and objectives for the student with a disability. The team also identifies the services the student needs, states how it will determine if the student has achieved the goals and objectives, and decides other important aspects of the student's special education, including the amount of time to be spent in regular education classes.

However, now that needed transition services must be stated in the IEPs of all students who are 16 years old and older (and in the IEPs of many students who are younger than 16), the basic tenets of the IEP described above are expanded, if not in format, then in philosophy. Perhaps the largest and most significant aspect of including transition services in the IEP is the need to expand the original concept of annual goals and short-term objectives to focus on outcomes of special education and incorporate the long-range life goals of the student with disabilities. This change in philosophy does not by any means indicate that educators and agency personnel can predict or be responsible for what the rest of an individual's life will entail. It does, however, cause professionals and families

to think beyond the parameters of year-long goals and school-only service systems. The subsequent challenge for IEP teams is the creation of transition goals that reflect the needs the student with disabilities will have as an adult and yet still fit within the guidelines of IEP process.

collaborative planning and programming at the local level. Certainly, these linkages are vital to students' successful transition to the adult world.

But what happens if a participating agency, such as the vocational rehabilitation agency, fails to provide the services it has

These policies and procedures should give the schools a mechanism for resolving disputes and for securing reimbursements from other agencies. However, because the strength of these agreements varies from location to location, some school districts may find that this particular regulation does not save them from having to assume total responsibility for paying for and providing transition services. How defaults will affect students and the services they receive also remains to be seen.

Another potentially negative outcome of this regulation governing defaults lies in the fact that the IEP team can, if necessary, revise the student's IEP. The way that the regulations state this might lead some to believe that goals and objectives stated in the IEP may be dismissed, simply because it is difficult for the school to find ways to meet them.

It is extremely important to note that *revising the IEP does not mean that goals and objectives may be abandoned*. The Secretary of Education is very clear on this point, as follows:

When an IEP team is reconvened, an alternative strategy may be able to be identified without changing the student's IEP. In other cases, the IEP team may find it necessary to revise the IEP to include alternative ways to meet the goals that were identified. (U.S. Department of Education, 1992a, p. 44848)

Thus, it is not the goal and objective statements that may be revised; it is the ways in which the goals and objectives will be met.

*Broadening Curriculum and Staff Roles.* Traditionally, educators have focused upon providing school-based services. Now, with transition services, schools must expand the scope of their services to include instructional and educational experiences that will occur outside of the school building and that are related to much broader outcomes: employment, independent living, functional skills, community participation. And "as the definition of the secondary-level special education classroom expands

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***"What happens if a participating agency, such as the vocational rehabilitation agency, fails to provide the services it has agreed to provide?"***

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The fact that the IDEA (P.L. 101-476) specifically defines transition services as a component *within* the IEP will, undoubtedly, have other ramifications for local education agencies and education professionals. For example, while many local education agencies (LEAs) across the country are already providing these services, they are following their own, individually-styled formats for transition planning. This includes the use of a separate *Individualized Transition Plan* (ITP) that is attached to the IEP. Since transition services are now defined as being part of the IEP, LEAs using a separate document (the ITP) may need to integrate development of this document into the IEP process.

*Bringing in the World Outside of School.* Another ramification is that the participants in an IEP meeting may now include individuals from outside of the school setting, such as representatives of adult service providers (i.e., vocational rehabilitation, Social Security Administration, JTPA programs, Community Services Board). Including professionals from nonschool agencies in IEP development is important in providing transition services, because any or all of these agencies may be involved with the student during and/or after his or her public school years. Further, the concept of *responsibility* has been expanded to include nonschool professionals. This is intended to encourage creative cooperation between the agencies to share transition responsibilities for the youth with disabilities and to forge linkages. Interagency coordination between youth and adult service providers will greatly facilitate the transition process and encourage

agreed to provide? The IDEA states that, in this instance:

...the public agency responsible for the student's education shall, as soon as possible, initiate a meeting for the purpose of identifying alternative strategies to meet the transition objectives and, if necessary, revising the student's IEP. [§ 300.347(a)]

Thus, should an agency default on its agreed-upon obligation, the public agency — in most cases, the school — is required to reconvene the IEP team and find alternative strategies for meeting the transition objectives stated in the IEP. One potentially negative outcome of this mandate is that, when any adult service provider fails to carry out its stated obligations, the responsibility for transition services returns to the schools. This possibility is addressed in the regulations for the IDEA, which state that, even when the school re-convenes the IEP team to discuss alternative ways of meeting a student's transition objectives, the participating agency defaulting on its obligation is in no way relieved "of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet the eligible criteria of that agency" [34 CFR § 300.347(b)]. How exactly the defaulting agency will be held accountable for the services it had agreed to provide is unclear, except that the policies and procedures set forth in the State plan for special education services — specifically those relating to interagency agreements (§ 300.152) — would be called into play.

beyond the physical structure of the school building to include the entire community, personnel capabilities must be expanded" as well (DeStefano & Wermuth, 1992, p. 543). Staff must learn new roles, new information, and new skills; they must be able to collaborate with "families, employers, community-based service providers, and other key players in the post-school environments encountered by students with disabilities" (p. 544). Clearly, these changes — expanding curriculum and expanding the competencies of staff — present schools with a significant challenge, particularly in this time of budget crunches and academically-oriented educational reform.

Given all that has been said above — the many details of federal regulations and how they govern provision of transition services — it may be useful to conclude this section by looking again at the Congressional intent *behind* transition services. This represents the spirit of the law and should be a guiding force in how school districts work with students with disabilities to prepare them for life after high school.

### Transition Services and Congressional Intent

*The Committee on Education and Labor issued these paragraphs as part of the report written to accompany and explain the Individuals with Disabilities Education Act, P.L. 101-476.*

The Committee expects that schools, when developing a child's individualized education program each year, will (a) consider the post-school outcomes desired for that student, and (b) provide educational and related services designed to prepare the student for achieving these outcomes. This process should begin as early as possible in a child's life and must be reflected in the IEP (by no later than age 16) as a statement of the transition services to be provided.

The Committee wishes to emphasize that the schools are not being asked to do what they are not intended to do. For instance, the schools are not expected to become job placement centers. However, there are many employment and employment related activities which are appropriately provided by and funded through the local education agency. In addition, the schools should facilitate linkage with other public agencies in the transition to independent living, job training preparation, vocational rehabilitation, and post-secondary education. That is why the Committee has taken great care in its choice of the words "which promotes movement" in the definition of transition services. The Committee expects schools to familiarize themselves with the post-school opportunities and services available for students with disabilities in their communities and State, and make use of this information in the transition planning for individual students. By doing so, schools can facilitate linkage with agencies when needed by students, can ascertain requirements for access to, and participation in, the opportunities offered by these agencies, and thus can effectively communicate this information to students and their families, and identify ways in which they can prepare students with disabilities to take advantage of these opportunities.

*(U.S. House of Representatives, 1990, June 18, p. 12)*

## Suggested Transition Components

Having looked at the IEP as a planning document, and some ramifications of including transition services in the IEP, let us now examine more closely the specific areas or domains that are critical for IEP teams to address when planning for a student's transition to adult life. These domains are:

- Employment, including supported employment;
- Postsecondary educational activities, including postsecondary education, vocational training, and continuing and adult education;
- Independent living, including exploration of residential options and daily living skills that will be needed in adult life;
- Eligibility for various adult services; and
- Community participation, including recreation and leisure activities and

the development of personal and social skills.

This discussion is based upon the transition planning being conducted in states throughout the country and upon the definition of transition services contained in the IDEA (§ 300.18). Before beginning to discuss each of these areas, however, it is important for the IEP team to realize that transition goals are not designed to predict what an individual will be doing in twenty years. While some of the transition goals developed for a student may be related to acquiring quite specific skills (e.g., how to use a piece of equipment essential to a particular occupation), many of the goals and objectives should represent basic skills that cut across the domains listed above. For example, punctuality is important not only in maintaining employment; it also has value in maintaining personal relationships, in accessing recreation and

leisure activities, and in using public transportation. Similarly, the ability to use money is important in independent living environments (for instance, to buy food or pay the rent) *and* in recreational situations, where tickets to an event might need to be purchased. Thus, it is a good idea for a student to address transition goals that focus upon developing skills that will be as relevant twenty years from now as they are at the time of IEP development.

For each student, self-determination and self-advocacy skills would certainly be relevant now and in the future. These skills — four of which are listed in the box on page 10 — provide students with a strong base for participating in the development of IEP goals, including transition services, *and* for managing the many aspects of adult life that will become important after high school.

Another issue that may be important in transition planning — and one that may

ultimately affect decisions made in each domain — is **transportation**. The IEP team may need to consider (a) the availability of public transportation in the student's community; and (b) how dependent the student will be upon public transportation in order to go to work or postsecondary school, travel to and from home, access adult service providers, and move about in the community. If the student can drive and expects to have access to a vehicle, then transportation may not be a critical factor in planning for the future. However, if the student will have to rely upon public transportation, then this fact needs to be taken into consideration when exploring future options. Certainly, many students will want to develop the ability to use public transportation by the time they leave the school system. In some cases, decisions about what postsecondary schools to attend, where to live in the community, and so on may be driven by the availability of transportation and the student's skill in using it.

It is also important to understand that not every student with disabilities will need to receive transition services in all of the domains. The domains discussed below will need to be considered to the extent indicated by the nature and severity of a student's disability and his or her plans and desires for the future. Some students with

severe disabilities will need extensive intervention to plan effectively for transition to adult life. Students with milder disabilities may require only limited services in one or two areas, with specific attention given to how their disability affects a particular aspect of transition.

## Employment

Given the research presented earlier on the unemployment and under-employment of individuals with disabilities, and the fact that working has been shown to make an enormous qualitative difference in the lives of people with disabilities (Harris & Associates, 1986), all members of the IEP team must give serious consideration to planning and preparing the young person for future employment. Developing employment-related transition goals for a student will require discussion and planning of issues such as:

- In what type of work is the student interested?
- Considering the nature and severity of the student's disability and the nature of his or her job interests, is it more appropriate for the student to be involved in competitive employment or some level of supported employment?
- If the student has chosen a particular occupational field, does he or she have

the skills and abilities needed to succeed in that field? What specific work skills is the student missing?

- Does the student know what employee behaviors are considered important to successful employment, and does he or she demonstrate these behaviors?
- What school activities are needed in order for the student to acquire these work-related skills and behaviors?
- What type of academic, social, and/or vocational program is needed to help the student acquire relevant work skills and behaviors *before* he or she exits high school? Is there such a program available within the school system or community? If not, what individuals and organizations (school, businesses, paraprofessionals, job coaches) can collaborate to develop a personalized program to address the student's needs?
- What types of accommodations might the student need on the job? Is the student informed as to his or her rights under federal law to receive accommodations? Does he or she have the self-advocacy skills necessary to request and obtain these accommodations?

For the IEP team to address these questions on an informed basis and develop appropriate employment goals and objectives for the student, a thorough vocational assessment of the student may be essential. Vocational assessment — which will be discussed in more detail later in this *TRANSITION SUMMARY* — can provide the IEP team with valuable information, such as what interests and aptitudes the student has, and what work skills the student has mastered and which skills need to be developed. Many of the issues associated with employment planning are discussed in two NICHCY products: *Vocational Assessment* (Transition Summary #6) and *Options After High School for Youth with Disabilities* (Transition Summary #7). There are also many transition models in use around the country, and these can be used to guide the IEP team's development of employment-related goals, objectives, and activities.

### Four Basic Transition Skills Relevant to All Students With Disabilities

It might be suggested that four of the most fundamental skills or knowledge students can have that will serve them well in a wide variety of adult situations are the following:

- *the ability to assess themselves*, including their skills and abilities, and the needs associated with their disability;
- *awareness of the accommodations they need* because of their disability;
- *knowledge of their civil rights to these accommodations* through legislation such as the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973; and
- *the self-advocacy skills necessary* to express their needs in the workplace, in educational institutions, and in community settings.

(Suggestions for obtaining transition models used in other localities are given in the last section of this *TRANSITION SUMMARY*, which is entitled "Guidelines for Transition Planning.")

One such model — called the Life-Centered Career Education Curriculum (Kokaska & Brolin, 1985) — breaks down the area of occupational skills into such goals as:

(a) selecting and planning occupational choices;

(b) exhibiting appropriate work behaviors; and

(c) seeking, securing, and maintaining employment.

Within each of these general goal areas, specific corresponding objectives might include:

(a) identifying occupational needs, interests, and aptitudes;

(b) following directions, working at a satisfactory rate, and accepting supervision; and

(c) searching for a job through want ads and personal networking, applying for a job, and interviewing for a job.

Of course, these are just some of the objectives that might be developed to address general occupational goals. Each of these objectives might be broken down further or other objectives might be developed to address the specific needs of the student. When setting goals, it is important to remember that employment skills, like any skills, are learned along a progressive continuum of difficulty. For example, the suggested goal areas under "Exhibiting Appropriate Work Habits and Behaviors" range from the basic behaviors of following directions and being punctual, to more advanced behaviors such as working at a satisfactory rate, working with others, and accepting supervision, and finally to a sophisticated behavior such as demonstrating occupational safety (Kokaska & Brolin, 1985).

It should also be noted that planning employment goals does not necessarily dictate specific jobs. While it is fine to develop goals related to acquiring the skills needed to do a specific job, this should not happen to the exclusion of developing the general skills and abilities necessary for

seeking, securing, and maintaining employment. An important aspect of transition planning is building skills that will generalize to adult situations and serve the student well later in life. In fact, most of the behaviors addressed in the "Work Habits" section may be practiced within the classroom setting from a very early age. This suggests that, ideally, transition planning should begin in the early elementary school years, giving students with disabilities the time and opportunity to develop a broad base of basic skills that would be transferrable to the wide variety of situations they will encounter throughout their lives.

### Postsecondary Educational Activities

Planning postsecondary educational activities recognizes that not all young people will seek employment immediately after they leave high school. Many students will want to pursue further education. This education may be academic in nature, such as going to a university or college, or it may be technically oriented, such as going to a trade school or vocational center to acquire the skills needed for a specific occupation (e.g., electrician, plumber, cosmetologist).

Goals and objectives related to this option will depend on (a) whether the student is intending to pursue an academic or technically-oriented education after high school; and (b) the nature and severity of the student's disability and how it affects pursuing postsecondary education. Some important general goals and objectives in this transition area might include:

- the learning of effective study habits;
- arranging for job try-outs to allow the student to sample work in a specific area;
- making arrangements for accommodations needed during college board or SAT testing (e.g., test in braille, oral presentation of questions, untimed testing, other);
- identifying postsecondary institutions that offer the sort of training or education desired;
- identifying the types of accommodations and support services that

the student needs because of his or her disability;

- identifying postsecondary educational institutions that make available the accommodations or support services needed by the student; or
- applying to the schools of choice and advocating for needed accommodations.

As with any transition goal-setting, planning for postsecondary education should be firmly grounded in assessment. Students who wish to attend college may still consider vocational assessment as an important process in identifying postsecondary and career options (Rothenbacher & Leconte, 1990).

### Independent Living

Considering the eventual independence of an individual with disabilities is often a source of concern and excitement for both the individual and his or her family. Many issues will need to be considered under this transition domain, including (a) where the student will live (either staying in the family home or living elsewhere), and (b) the skills that are basic to taking care of oneself.

*Exploring Independent Living Options.* Not every student with disabilities will need to consider the question of where he or she will live after leaving high school. Some will wish to continue living in the family home. Others may be attending a postsecondary institution that provides housing for students. However, for many students, exploring the question of where to reside in the community will be an important transition issue. Options may range from independent living to group living to institutional care, and may take the following forms:

- *Independent living situations* do not provide the person with disabilities with supervision or support. The person is responsible for all aspects of self-care and maintenance. Renting an apartment or house alone or with a group of friends, with no more assistance than what a person without a disability might receive, would be an independent living situation.

- *Foster homes* are owned or rented by a family that provides some care and support to one or more nonrelated individuals with disabilities. This setting emphasizes "the individuality, diversity, and intimacy" that the family situation typically provides (Janicki, Krauss, & Seltzer, 1988, p.6).

home or outside the home, either alone or with others), the nature and severity of the disability, the amount of care, support, and supervision the person needs on a daily basis, and the amount of support available through the family and through local, state, or federal agencies (Eshilian, Haney, & Falvey, 1989, p. 120). Each student and his

Depending upon what assessment reveals about a student's proficiency at daily living skills, independent living goals may accent such skills as: (a) caring for personal hygiene needs, (b) managing finances, and (c) purchasing and preparing food. Each of these goals can be broken down into objectives that would range in level of difficulty. Under Kokaska and Brolin's (1985) model, for instance, the goal area of "Managing Daily Finances" includes a range of objectives that are learned in sequence, so that across one or more years a student might be required to master any or all of these skills:

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***"For many students, particularly those with severe disabilities, a community-based curriculum is highly appropriate."***

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- *Group homes* have staff who provide care, supervision, and training for one or more individuals. The number of individuals may vary from group home to group home. Small group homes may have fewer than 10 people, while a large group home might serve from 21 to 40 individuals.
- *Semi-independent living situations* generally have separated units or apartments in one building, with staff living in a separate unit in the same building. The staff provides some care and support to the individuals with disabilities who live there, in keeping with each individual's needs.
- *Board and supervision facilities* have staff who provide residents with more extensive care and support than they would receive in a semi-independent living situation. For example, residents have sleeping rooms and receive meals and supervision. However, no formal training or help with dressing, bathing, and so on is provided.
- *Personal care facilities* have staff who provide residents with help in dressing, bathing, and other personal care. No formal training is provided to residents.
- *Nursing homes or institutions* provide comprehensive care to individuals with disabilities, including daily nursing care. (Hill & Lakin (1986), as cited in Janicki, Krauss, & Seltzer, 1988, p.6)

or her family members will need to decide which independent living option best suits the needs and preferences of the student in question. The school can provide instruction in areas that would help an individual gain independence, such as home economics, driver's education, and money management. Schools can also help the student address this post-school adult living domain by providing him or her with information about living options in the community and assessing the student's need for support. The student and his or her family can then use this information to explore options on their own. They might visit as many of the options as possible and learn the eligibility and application requirements of each. Based on the information they collect, a decision would then be made within the family about where the student will live as an adult.

*Acquiring Daily Living Skills.* Daily living skills are the skills involved in taking care of oneself on a daily basis. These skills are an important subcomponent of the independent living domain and include such activities as dressing, grooming, household chores, shopping, managing finances, and so on. How completely the student has mastered daily living skills may ultimately determine the type of living environment selected as most appropriate.

As with the other post-school adult living domains, a thorough assessment of student skill levels is an essential part of developing appropriate instructional activities. Parents and students can contribute a great deal of anecdotal information in this regard, as would an ecological assessment (see page 16 for a description of this assessment method).

- identifying money and making change;
- budgeting and making wise expenditures;
- obtaining and using bank facilities
- keeping financial records; and
- calculating and paying taxes.

Similarly, the general goal area of "caring for personal hygiene needs" might be broken down into objectives ranging from basic skills such as being able to dress and groom oneself appropriately, to more advanced skills such as knowing how to prevent and care for illness. Stating each objective needs in terms that are observable and quantifiable allows the IEP team to determine concretely if the student has mastered the skill in question.

Because acquiring daily living skills is so central to a person's ability to function independently, much care needs to be taken in how instructional activities are designed. For many students, particularly those with severe disabilities, a *community-based curriculum* is highly appropriate. In a community-based approach, students may initially learn and practice a skill (e.g., buying food) in the classroom but eventually practice the skill in a community or home setting. This is because many students will have difficulty transferring what they have learned in the classroom to the actual setting in which the skill is typically used (e.g., the grocery store). What happens then is that, while the student can perform the skill in class, he or she may not be able to do so in the real world environment where the skill is actually needed. Therefore, "community environments frequented by the student

and by his or her family now and in the future should be the environments used to directly teach" (Falvey, 1989b, p. 92). It is important to note that community-based instruction is most effective when only a small number of students receive instruction at a time.

For a number of logistical reasons, many school districts have been reluctant to use a community-based approach. The most typical problems include difficulty in staffing, funding, transportation, liability issues (who is responsible for injury or property damage when students are involved in community training), safety of the students, community access, and administrative, teacher, and parental support (Falvey, 1989b, pp. 94-105). Yet, there are many ways in which school districts can address and overcome these problems (see Falvey, 1989b). Now that "community experiences" are listed in IDEA's definition of transition services [§ 300.18(b)(2)(ii)], one would expect to see school districts providing some transition services through a community-based curriculum. It is certainly worthwhile for districts to develop instructional programs based in the community and for parents and student to support this type of learning experience. Such an approach to learning and teaching is often essential, if students are going to master the skills necessary to functioning in the community.

### Eligibility for Adult Services

For many youth, "a successful transition into the labor force is contingent upon a successful transition from special education to the adult service delivery system" (DeStefano & Snauwaert, 1989, p. 37). This is because, once the young adult with disabilities exits the school system, he or she is no longer formally *entitled* to receive services. Rather, the youth must demonstrate his or her *eligibility* to receive services. Moreover, students and their families may be faced with a multitude of service options, each with its own eligibility requirements. For young people with disabilities, two of the most important service providers may be:

- the Social Security Administration, which administers the Supplemental

Security Insurance (SSI) and Social Security Disability Insurance (SSDI) programs (each of which can provide individuals with disabilities with cash benefits, work incentives, and Medicaid coverage); and

- the Vocational Rehabilitation system, which can provide services ranging from job training to job placement and follow-up.

Both of these adult service providers are described and discussed in Murray & Küpper's (1991) article "Adult Systems" in NICHCY's *TRANSITION SUMMARY* entitled *Options After High School for Youth With Disabilities*. There may be many other agencies in the community as well (e.g., Department of Mental Health, Community Services Boards, Social Services, Developmental Disability Council, State Employment Commission, JTPA projects). Any of these agencies may make a range of services available to individuals with disabilities who meet eligibility requirements. Thus, investigating adult services and identifying eligibility requirements are crucial aspects of planning for the student's future.

Since transition planning must now involve input from community agencies that will serve the individual upon exiting the school system, using IEP goals as a vehicle to investigate, identify, and satisfy these agencies' eligibility requirements will give the student a head start in accessing these service providers in the future. For example, a goal might be for the student to become familiar with at least four postsecondary service providers. Corresponding objectives and activities could then specify visiting the agencies, meeting with caseworkers, determining eligibility requirements, and completing the paperwork necessary to establish eligibility in the agencies judged to be most appropriate to the student's needs. The school system might even wish to arrange for representatives of these agencies to visit the school and meet with a group of students.

Parents and students should be aware that some adult service providers such as the Social Security Administration require several months to process applications. To

avoid an unnecessary delay in receiving services upon graduation, it is suggested that the student file an application six months or so before leaving school. Parents and students should also be aware that students may be placed on a waiting list to receive services from agencies such as Vocational Rehabilitation. Therefore, it is a good idea to explore alternatives to these traditional service providers. Often, word-of-mouth provides the best leads to alternate service providers. The school itself or the district's special education office may be able to recommend agencies or organizations that provide services or referral within the community or county. Other organizations that parents and students might consider contacting include: private nonprofit organizations within the community, local parent advocacy groups, disability advocacy groups, and the Developmental Disabilities Council. It may also be helpful to look in the Yellow Pages Telephone Book under "Family Services" ("Human Services" or "Social Services" in some locales) and see what service agencies are listed.

### Community Participation

The IDEA specifically mentions community participation as one possible domain of transition planning. Indeed, if the end goal of transition is to live successfully in one's community (Halpern, 1985), then transition teams will need to address not just where the young adult will live in the community, and where he or she will work or go to school, but also *how* the individual will live. Webster's New Collegiate Dictionary (1980) defines "community" as "an interacting population of various kinds of individuals in a common location." Unfortunately, for many individuals with disabilities, community is merely a place of buildings and streets. There is little social interaction with other community members and little participation in community events. Through planning and preparation, however, young people with disabilities can learn to participate more fully in, as well as contribute to, the life of their community. Specific attention may need to be given to two dimensions of community participation: recreation and leisure skills, and personal and social skills.

**Recreation and Leisure.** Many youth with disabilities need special assistance to learn how to use their recreation and leisure time constructively. Planning often needs to focus on developing a student's ability to identify, pursue, and participate fully in recreational and leisure activities in school

developed. In communities that have recreational facilities and activities open to community members, goal statements might focus upon developing the student's basic skills in information gathering, self-initiation, and choice-making, all of which would empower the student to pursue his or

department, recreation centers, YMCA and YWCA, movie theaters, bowling alleys, pools, community colleges, church groups, hobby groups or clubs, and neighborhood gyms and sports clubs (Falvey & Coots, 1989, pp. 159-160).

**Personal and Social Skills.** While transition planning cannot encompass all phases of an individual's life roles, helping the student to develop good personal and social skills is likely to prove beneficial across many of the domains of adult life. For example, having good personal and social skills can help the person form and maintain friendships within the community, interact with service providers, and obtain and maintain employment. Thus, the development of personal and social skills is an appropriate transition goal for many students.

The goals and objectives developed in this area, of course, should be individualized to meet the student's particular needs. For example, if a student has difficulty in behaving in ways that are socially appropriate, objectives might include learning how to maintain eye contact; learning how to greet people; knowing the difference between strangers, acquaintances, friends, and intimates and how each should be treated; developing appropriate table manners; demonstrating the ability to take turns during conversations; and so on. If the student has difficulty with behaving in ways that are socially *responsible*, objectives might range from the student knowing the difference between public and private situations, to being able to recognize authority figures, to becoming aware of the laws and punishments for certain types of behavior.

Certainly, having good personal and social skills is important to functioning in the many domains of adult life. There are many resources available to assist parents and professionals in planning activities which will help the student develop these useful skills. Some of these materials are listed under "Community Participation" in the RESOURCES section of this document.

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***"Parents and professionals are cautioned against developing transition goal statements that essentially force the student to participate in a recreational activity that is not of personal interest or value."***

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and in the community. According to Falvey & Coots (1989, p. 142), positive outcomes of developing students' recreation and leisure skills are that:

- having these skills can facilitate the participation of individuals with disabilities in a variety of environments;
- recreation and leisure activities are physically and emotionally beneficial to persons of all ages;
- these activities provide opportunities for social interaction, communication, and the development of friendships;
- constructive use of leisure time can reduce inappropriate social behavior; and
- these activities can be developed into vocational and career opportunities.

No professional, however, should pretend to know the most enjoyable activities for a student outside of school, and most certainly the student's likes and dislikes may change with maturity. It is important that recreation and leisure activities developed to address IEP goals and objectives are ones "that are desired, preferred, and chosen by the individual" (Falvey & Coots, 1989, p. 146). Therefore, parents and professionals are cautioned against developing transition goal statements that essentially force the student to participate in a recreational activity that is not of personal interest or value. Goal statements might focus upon helping the student learn to use his or her leisure time constructively and in ways that are personally enriching; the specific skills needed to participate in a chosen recreational activity (e.g., swimming, tennis, singing, bowling, card games, etc.) might also be

her own interests. Concrete objectives, then, might include the student's learning:

- what types of assistive technology are available to facilitate his or her participation in recreational activities of interest;
- what specific accommodations or adaptations can be made to help the student participate in a recreational activity;
- how to find out what is happening in the community;
- how to access public transportation; or
- how to acquire tickets to events.

These objectives might be tied initially to school events, so that, depending upon the interests and abilities of the student, he or she might pick a number of school events to attend (e.g., ball games, concerts, plays, dances), find out when and where the event takes place, buy a ticket, and arrange transportation to and from the event.

Extending these activities to community events would be the next logical step in the student's acquisition of the basic skills needed to participate in recreation and leisure activities. Using a *community-based curriculum*, as described under "Independent Living: Daily Living Skills" (page 12), is highly recommended. To take advantage of events occurring in the community, it is a good idea to develop a resource bank of community organizations. (Some of these organizations may be agencies that could share responsibility for planning and implementing the transition services a student needs.) Examples of organizations in the community that may be helpful include: the park and recreation

## Tying Transition Goals and Objectives to School Events and Activities

Once transition goals and objectives have been developed for a student with disabilities, school personnel then design activities to help the student achieve each objective. With their focus on developing skills that will help the student in a variety of adult roles, some transition services may be distinct from other educational services the school system typically provides. For example, developing a student's ability to participate in community activities may be a new task for many school districts. Investigating residential options as a part of the Independent Living domain would be similarly new ground for many schools. It may be difficult to develop activities corresponding to some of the stated transition goals and objectives, when educational programming typically revolves around placing the student in one class for first period, another class for second period, and so on. Thinking creatively about educational programming may be necessary in order to develop a "match" between a student's transition goals and objectives and his or her class schedule (e.g., First Period-Special Education English, Second Period-Social Studies, etc.). While not intended to imply that all transition goals can be met through programming within the school building itself — the community must clearly be the site of many transition activities — this section presents some examples of ways in which school systems can incorporate transition activities into students' educational programs, as well as take advantage of school events and activities to help students with disabilities achieve transition goals.

Many employment-related transition goals can be addressed in vocational education programs. Teachers should be alert to opportunities to place students in jobs within the school, where they can practice skills learned in vocational education class. For example, students might be required to work in the office one hour a day as a lab placement. Specific skills such as answering telephones, typing, or computer work could be practiced, and

worker behaviors such as punctuality, working under supervision, and staying on task could be observed, developed, and evaluated.

Under the independent living domain, many daily living skills can be readily addressed in classes the school typically

The development of personal and social skills can be addressed through classes that allow students to interact. This would include both special education classes and mainstream classes with nondisabled peers. Places such as the school bus or the cafeteria also give students the opportunity to address

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### *"Planning for post-school life must be based on a thorough assessment of the individual."*

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offers. For example, these "matches" could be made:

- food purchase and preparation in home economics or math class, or in the school cafeteria or store;
- money management in math class;
- reading survival words, using the phone book, reading the help wanted ads, movie schedule, bus schedule, and so on in English class;
- personal hygiene in health or home economics class; and
- driving or transportation issues in driver's education class.

Students could then apply the daily living skills relevant to their needs by performing "jobs" around the school. Working in the cafeteria, for example, could provide students with concrete application of food preparation skills. Selling tickets at a school event or working in the school store provides similar opportunities to apply money management skills.

Recreational and leisure skills could also be developed in a number of ways within the school. Physical education classes are a good place to learn skills that are useful to pursuing recreational activities such as swimming, baseball, or basketball. Elective courses such as music, art, dance, creative writing, or home economics offer students opportunities to develop appreciation for ways to use leisure time constructively. This can form the basis for eventual investigation of and participation in community events and clubs. Afterschool clubs such as astronomy, drama, band, or intramural sports offer similar opportunities for growth and involvement. Even events that require passive participation (e.g., attending school plays or sports events) can be used to develop skills and interests that will transfer to community settings.

goals and objectives in this area, as do afterschool clubs (e.g., working on the newspaper or yearbook).

The important point here is that there are many diverse and creative ways that transition goals and objectives can be addressed, using the resources within the school and the events and activities that typically take place there. Parents and professionals can take advantage of what is naturally occurring in the school to give students the opportunity to practice and apply many of the skills important to transition. This may be essential in rural locations where the nearest town is miles away and students have limited opportunities to practice within the community those skills they are learning in school.

## The Importance of Assessment in Transition Planning

The underlying philosophy of transition planning is the student's preparation during the school years for longer-range life roles. Planning for post-school life must be based on a thorough assessment of the individual. Assessment will reveal that person's strengths and needs, information which can then be used as the basis for making educational decisions.

Assessment should not involve the use of only one instrument or test. In order to provide a broad range of information about the student, a variety of assessment approaches and tools is necessary. For example, *achievement tests* used in the classroom can contribute information about the student's skills in reading, math, or other subject areas. *Psychometric tests* can be used to measure the attributes of the individual such as his or her interests,

personality, or aptitudes. *Observations* of the student also contribute valuable information about the student, such as attentiveness, dexterity, attitude, and skill level at a particular task. Particularly good observational and *anecdotal* information about the student comes from the student's parents, because "parents and other family members are generally most familiar with the levels of skill proficiency of their sons or daughters" (Falvey & Haney, 1989, p. 18). The student, too, may also be a rich source of information about his or her skill levels, interests, and attitude.

- worker characteristics, including student traits, values, employability skills, and other work-related behaviors;
- abilities in specific technical, industrial, or other skills required in actual jobs; and
- functional or life skills, needed to address personal and independent living problems such as transportation, financial and housing management, and social skills (Rothenbacher & Leconte, 1990).

Most of this information can be gathered through informal means, such as inventories

prepare for, participate in, and terminate the activity (Black & Ford, 1989, p. 300).

After the inventory is completed, student assessment is conducted at the actual site where the activity is typically performed. It is critical that the student be somewhat familiar with the environment and activity prior to conducting the assessment; assessing the student when he or she is confronting a new situation will not give a true indication of his or her abilities (Black & Ford, 1989). Thus, continuing our example, the student would be asked to catch and ride the bus, *without* assistance, and an observer would use the inventory as a checklist, identifying which components of riding the bus the student can perform and which he or she can not (including when he or she performs the right action but at an unacceptable rate). "In the event of an obvious error or no response, the teacher should be prepared to provide the least amount of assistance required by the student to help him or her move on to the next step" (Black & Ford, 1989, p. 298).

How the student performed the activity is then compared to the steps of the inventory, and discrepancies are noted. These discrepancies form the basis for making decisions about what skills to teach the student and what to adapt. Adaptations can involve changing the sequence, developing an aid, or teaching the student to perform different but related activities (Black & Ford, 1989; Falvey, 1989a). Some students may be expected to master all of the steps in an activity; others may be expected to master some of the steps and partially participate in others.

Ecological assessment is one of the most appropriate means of determining what skills and components of skills a student needs to develop in order to address the many domains of post-school life. Its emphasis upon breaking tasks down into their component steps ensures that students are, indeed, focused upon learning to perform those tasks they will actually need in adult life.

Whatever the methods used in assessment, the end result should be a more thorough understanding of the student's skills in the post-school adult living domains. This understanding should lead to more

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While achievement and psychometric testing and observations provide good information, they may not provide sufficient information for planning nonacademic goals. *Vocational assessment* of students with disabilities is, therefore, strongly recommended. "Vocational assessment is a systematic, ongoing process designed to help students and their parents understand the young person's vocational preferences and potential" (Rothenbacher & Leconte, 1990, p. 2). Through the assessment process, students and families have the opportunity to learn about various careers, as well as the student's personal and vocational attributes and weaknesses. Vocational assessment should contain components that gather information not available through academic testing — specifically the essential characteristics of the individual that make up his or her vocational profile. The areas to be assessed include the student's:

- occupational or vocational interests and preferences;
- aptitudes in skills such as mechanical, spatial, numerical, and clerical;
- worker style preferences, such as the desire to work with people or things;
- learning preferences and styles, such as auditory, visual, or hands-on exposure;

that measure interests, learning styles, and worker characteristics. Additional assessment methods include trying different tasks that replicate skills needed on the job, or performing actual workplace tasks during on-the-job tryouts. [For an in-depth discussion of vocational assessment, see *NICHCY's TRANSITION SUMMARY* entitled *Vocational Assessment* (Rothenbacher & Leconte, 1990)].

A particularly useful and appropriate method of collecting information about the student in all transition domains is called *ecological assessment*. This method involves looking closely at the environment where an activity normally takes place and determining, through observation and through actual performance, the steps that are involved in performing the activity. For example, a teacher or paraprofessional might go to the busstop and observe and list in detail the steps involved in waiting for and catching the bus. He or she might then actually ride a bus, to check the completeness of the list that has been developed. This list then serves as an inventory of the component skills (steps) a student needs in order to perform the activity. It is important that the inventory describe each component skill in observable terms, sequence the skills in the order needed to perform the overall activity, and include all steps required to initiate,

appropriate choices in setting transition goals that are sensitive to the student's interests, preferences, needs, and aptitudes.

## Suggestions for Transition Planning

Federal policy has encouraged the development of diverse approaches to transition planning. Accordingly, school districts involved in transition planning for students with disabilities have developed models and programs that reflect local geography and philosophy, student populations, and staff and funding resources. As a result, no nationally consistent model for IEP transition goal planning exists as of this writing.

A recent national study on transition (Repetto, White, & Snauwaert, 1990) provides insight into the transition activities within the states. The study confirmed that, from state to state, there is no consistency in transition-planning documents and processes. State departments may set policy or offer guidelines concerning the age when transition planning should begin, which persons should form the transition team, and what areas need to be addressed when planning transition goals. However, the responsibility for designing the transition planning documentation and developing the actual planning process seems to rest with the local education agencies (LEAs). This means that there may be little consistency between LEAs within a state in terms of the planning age, transition team membership, and type of documentation used for planning and providing transition services. While flexibility at the local level allows each district to provide services based upon individual needs and resources into the area, this very flexibility certainly contributes to the inconsistency present nationwide.

Given that transition practices vary from state to state, and from LEA to LEA, the following general suggestions may help set the stage for positive teamwork, regardless of the transition approach taken by individual school districts.

**Suggestions for Parents.** Here are some ideas that may be useful to parents as their child with disabilities becomes involved in planning for transition.

*Become familiar with how your school or LEA approaches transition planning.* You may find it very helpful to know the specific format your school or local education agency (LEA) uses for including transition goals within the IEP. (Although formats vary among LEAs and across states, the core components of IEPs, described

assessment, and to advocate for positive changes in school transition curriculum.

*Encourage your child to express his or her views and feelings during IEP meetings.* Your child has the right to receive needed transition services and to contribute to the nature of the services he or she receives. Let your son or daughter know that his or

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***“Let your son or daughter know that his or her interests and preferences are an integral part of developing appropriate transition goals.”***

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earlier, appear to be present in most planning documents in some form.) You can usually get this information by contacting the Director of Special Education in your district and asking about transition services for youth with disabilities. Be sure to ask for the name of the person in charge of developing transition services. While there may be no one with this specific responsibility, many states and LEAs have designated contact persons. Meet with the person or persons who have responsibility for developing these services, and get copies of whatever forms they use to help students plan for transition. As an informed parent, you are then able to advocate for including statements in your child's IEP regarding levels of performance, team membership, annual goals and objectives, specific services, projected dates of initiation and duration, and objective evaluation criteria. You will also be able to monitor whether these statements are adhered to in practice.

**Keep accurate records on your child.** Records to keep include medical episodes (including injury or serious illness), Social Security or Medicaid involvement, employment experiences, volunteer experiences, previous vocational coursework, possible acquaintance networks for employment opportunities, and alternatives for family residential care. All of these records can be very useful during transition planning and after your child has left the public school system.

**Be aware of your rights.** You have the right to access your child's educational records, to question decisions made without your input, to demand appropriate

her interests and preferences are an integral part of developing appropriate transition goals. Encourage your child to communicate those interests and preferences, and do everything you can to make sure that your child's opinions are understood and valued by other members of the transition team.

*Don't be reluctant to express your own views and feelings during IEP meetings.* You, as a parent, know your child better than anyone. You know his or her strengths and weaknesses, preferences and desires, and much, much more. Your observations can contribute a great deal to the planning process.

*Make sure you get a copy of your child's IEP stating transition and other educational goals.* Having a copy of your child's IEP will help you keep track of what needs to be accomplished in terms of your child's transition.

*Do what you can to reinforce your child's preparation for transition.* There are many things that you can do to help your child prepare for transition. Every day presents opportunities to reinforce your child's development of skills in self-advocacy, self-care, household management, and decisionmaking. These skills are vital ingredients for assuming the responsibilities of adulthood.

*Keep in touch with other members of the transition planning team.* This helps to avoid delay or conflict in executing the objectives listed in your child's IEP or in seeking and obtaining appropriate services.

**Suggestions for Professionals.** Here are some ideas that professionals may find

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useful when developing and providing transition services.

*Take advantage of resources available elsewhere.* If there is no model for providing transition services available in your vicinity, or if your school system is expanding or modifying existing services, contact other professionals within and outside of your state to see what they are doing in the area of transition. Ask for copies of the specific formats they use. For example, there may be guidelines available at the state level.

also have unique insights about their child with disabilities and can contribute information that will help the transition team develop appropriate goals and objectives for the student. Try to avoid using esoteric or jargonistic language in IEP meetings, for this can detract from the parents' or the student's perceptions of themselves as full team members.

*Develop a curriculum or approach that allows for community-based experiences.* Many students with disabilities

and abilities the student has already demonstrated. Goals should not be unattainable considering the school's resources. However, schools should actively seek to address goals requiring creative programming through *all* possible resources available to them. This includes developing shared service delivery approaches that involve adult service providers, as well as exploring resources available within the community.

*State who will be responsible for providing each transition service.* Because transition planning involves personnel from schools and other community agencies, transition goals in the IEP should state the parties responsible for each goal, the timelines within which each goal is to be accomplished, and mutually understandable criteria for evaluation of student outcomes. Case management duties, wherein one participant serves as the overseer of the collaborative efforts of the other participants, are in most cases assumed by the school. However, all participants who sign an IEP are accountable for fulfilling their respective roles. When interagency agreements are contained within the IEP, each participant in essence agrees to work collaboratively with the others and indicates that agreement by signing the IEP.

*Make use of student educational placements to achieve transition goals.* It is possible to make creative use of student educational placements to achieve transition goals and objectives. For example, a transition goal might be for the student to become informed about his or her rights to reasonable accommodation under the Americans with Disabilities Act (ADA). This goal might be addressed in the student's English or social studies class through a composition or a project. The student might complete the required composition or project by focusing on what the ADA requires in terms of reasonable accommodation. This sort of project works well in integrated classrooms, giving all students the opportunity to learn about this newest civil rights legislation.

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***"One of the great injustices that can occur during educational planning is charting a young adult's future needs without consulting the person who is most affected."***

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Other LEAs in your state may have working models for transition planning and service provision. Other states may be able to provide useful information that will help your school or LEA develop an effective process for providing transition services. Use these resources to develop a process that works for your locale.

Statewide information would be available by contacting your State Department of Special Education or other districts in your state, or, for those living on reservations, by contacting the Bureau of Indian Affairs (BIA). Information about transition practices in other states is available by contacting the Transition Research Institute at Illinois at (217) 333-2325. You can also contact the National Clearinghouse on Postsecondary Education for Individuals with Disabilities (also known as the HEATH Resource Center) at 1-800-544-3284 and ask for a copy of their recent *Information from HEATH* publication which contains an article entitled "Transition in the United States: What's Happening" (Hartman, 1991). This article describes what several states are currently doing in terms of transition and lists persons to contact for more information.

*Communicate fully with the student and his or her parents and solicit their input about transition needs and interests.* In most cases, the student can contribute vital information about his or her preferences, interests, and needs. Parents

(particularly those with more severe disabilities) learn functional and life skills most effectively when taught in the environment where the skills are actually used. There may be many obstacles to developing and using community-based experiences for students with disabilities, but these can be overcome through planning and persistence. Students with disabilities will certainly benefit from the efforts of professionals to develop a community-based approach to teaching and learning.

*Reminders for the IEP Team.* These suggestions are actually reminders of important things to consider when the IEP team convenes to plan the transition services that a student with disabilities will need.

*Be sure to consider student interests and aptitudes when developing a transition plan.* One of the great injustices that can occur during educational planning is charting a young adult's future needs without consulting the person who is most affected. Both parents and professionals should never be too quick to rule out a student's desires on the grounds that they are "unrealistic" or difficult to address.

*Make sure that the IEP goals, objectives, and activities are broken down into workable segments that prepare the student for the larger postsecondary world.* Goals and objectives should be based on transition needs that have been identified for the student and should build upon skills

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## In Conclusion...

The inclusion of transition services in IEP development for youth with disabilities is a positive social and legislative move. Preparing students while they are still in school for the important roles of adulthood — employment, education, independent living, adult service providers, and community participation — is vital to reducing the disproportionately high unemployment rates and substandard wages and benefits experienced by too many individuals with disabilities.

Parents or guardians, school personnel, adult agency personnel, local education agency representatives, and, most importantly, youth with disabilities are being asked to work together in choosing goals, objectives, and activities that will best prepare youth with disabilities for future life role needs. Although there is no consensus on the "correct" format for transition goal inclusion in educational planning, the vital point is not whether the goals are in the IEP itself or in a separate ITP document. The issues of great importance are whether the goals and

objectives specified for a student are in keeping with the individual and the family's real life needs, whether the goals and objectives are broken into workable segments that contribute in an organized manner to the larger picture of successful adult adjustment, and whether all resources are being utilized to achieve those goals and objectives. If these issues are addressed in a cooperative manner, based on solid assessment, and rooted in solid evaluation criteria, each student and community will benefit far beyond the student's school years.

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## FYI: Information Resources from NICHCY's Database

The following information was selected from numerous resources abstracted in NICHCY's database. If you know of a group that provides information about transition services for youth with disabilities, or that develops materials or programs in this area, please send this information to NICHCY for our resource collection and database. We will appreciate this information and will share it with others who request it.

The organizations listed are only a few of the many that provide various services and information about transition services. You can obtain many of the documents listed below through your public library. Whenever possible, we have included the publisher's address or some other source in case the publication is not available in your area. *If you are interested in obtaining a resource listed in this document, it is a good idea to contact the publisher or organization and obtain the latest information on ordering, payment procedures, and shipping and handling charges.*

Additional publications and information are also available from the clearinghouses listed, and state and local education agencies. Please note that these addresses are subject to change without prior notice. If you experience difficulty in locating these documents or organizations, or if you would like additional assistance, please contact NICHCY. Finally, you may find NICHCY's *State Resource Sheet* for your state or territory helpful in contacting other resources of information.

You may obtain copies of the laws discussed by writing to your Congressional Representative. Federal regulations are available by writing to: Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402. There is usually a charge for the documents. It is important that you include the title of the regulations.

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## Magazines, Newsletters

*Communitas Communicator*. A newsletter published by Communitas, an "international network of people dedicated to enriching communities, neighborhoods, local associations, schools, and work places through full integration and participation with people who have disabilities." Available from Communitas, Inc., Box 374, Manchester, CT 06040. Telephone: (203) 645-6976.

*Interchange*. Available from the Transition Research Institute, College of Education, University of Illinois at Urbana-Champaign, 61 Children's Research Center, 51 Gerty Drive, Champaign, IL 61820. Telephone: (217) 333-2325.

*What's Working in Interagency Planning for Transition*. A newsletter published quarterly by the Institute on Community Integration, University of Minnesota, 109 Pattee Hall, 150 Pillsbury Drive SE, Minneapolis, MN 55455. (612) 624-4512.

## Publishers

Listed below are several publishers that offer a wide variety of books, assessment packages, and curricula that parents and school personnel can use to address the transition domains discussed in this document. Contact the publisher and request a copy of their latest catalogue. The products available will be described in some detail, allowing you to select the ones most relevant and affordable to your needs.

Edmark, P.O. Box 3218, Redmond, WA 98073-3218. Telephone: 1-800-426-0856.

James Stanfield Publishing Company - P.O. Box 41057, Santa Barbara, CA 93140. Telephone: 1-800-421-6534.

Paul H. Brookes Publishing Company - P.O. Box 10624, Baltimore, MD 21285. Telephone: 1-800-638-3775.

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# ORGANIZATIONS

## Transition and Vocational Education Information Resources and Clearinghouses

**Association on Handicapped Student Service Programs in Postsecondary Education (AHSSPPE)** - P.O. Box 21192, Columbus, OH 43221. Telephone: (614) 488-4972 (Voice/TDD).

**Clearinghouse on Disability Information** - Office of Special Education and Rehabilitative Services (OSERS), Room 3132, Switzer Building, 330 C Street S.W., Washington, DC 20202-2524. Telephone: (202) 732-1723.

**ERIC Clearinghouse on Adult, Career, and Vocational Education** - Ohio State University, Center on Education and Training for Employment, 1900 Kenny Road, Columbus, OH 43210-1090. Telephone: (614) 292-4353; 1-800-848-4815.

**Materials Development Center (MDC)** - Stout Vocational Rehabilitation Institute, University of Wisconsin-Stout, Menomonie, WI 54751. Telephone: (715) 232-1342.

**National Center for Research in Vocational Education (NCRVE)** - University of California at Berkeley, 2150 Shattuck Avenue, Berkeley, CA 94704-1306. Telephone: (415) 642-4004.

**National Center for Youth with Disabilities (NYCD)** - University of Minnesota, Box 721, UMHC, Minneapolis, MN 55455. Telephone: 1-800-333-6293 (Voice); (612) 626-2825; (612) 624-3939 (TDD).

**National Clearinghouse on Postsecondary Education for Individuals with Disabilities (HEATH Resource Center)** - One Dupont Circle, Suite 800, Washington, DC 20036-1193. Telephone: 1-800-544-3284 (Voice/TDD); (202) 939-9320 (in DC metropolitan area).

**National Rehabilitation Information Center (NARIC)** - 8455 Colesville Road, Suite 935, Silver Spring, MD 20910. Telephone: 1-800-346-2742 (Voice/TDD); (301) 588-9284 (Voice/TDD in MD).

## Other National Information Resources

**Division of Career Development (DCD)** - Council for Exceptional Children, 1920 Association Drive, Reston, VA 22091-1589. Telephone: (703) 620-3660.

**Helen Keller National Center - Technical Assistance Center (TAC)** - 111 Middle Neck Road, Sands Point, NY 11050-1299. Telephone: (516) 944-8900.

**Institute on Community Integration** - Transition Component, 6 Pattee Hall, 150 Pillsbury Drive SE, Minneapolis, MN 55455. Telephone: (612) 625-3863.

**Interagency Office of Transition Services** - Minnesota Department of Education, 550 Cedar Street, St. Paul, MN 55101. Telephone: (612) 624-4848.

**Job Accommodation Network (JAN)** - P.O. Box 6123, Morgantown, WV 26506-6123. Telephone: Outside of WV, call 1-800-526-7234; in WV, call 1-800-526-4698.

**Mainstream, Inc.** - #3 Bethesda Metro Center, Suite 830, Bethesda, MD 20814. Telephone: (301) 654-2400 (Voice/TDD).

**National Alliance of Business (NAB)** - 1201 New York Avenue NW, Washington, DC 20005. Telephone: (202) 289-2888.

**National Association of Private Residential Resources (NAPRR)** - 4200 Evergreen Lane, Suite 315, Annandale, VA 22003. Telephone: (703) 642-6614.

**National Council of Independent Living Programs (NCILP)** - Troy Atrium, Broadway & 4th Street, Troy, NY 12180. Telephone: (518) 274-7944.

**National Rural Development Institute's Resource Center** - ACRES Librarian, National Rural Development Institute, University of Utah, Department of Special Education, Milton Bennion Hall, Room 221, Salt Lake City, UT 84112. Telephone: (801) 585-5659.

**Parents Advocating Vocational Education (PAVE)** - 6316 S. 12th Street, Tacoma, WA 98465. Telephone: (206) 565-2266; 1-800-572-7368 (in WA).

**President's Committee on Employment of Persons with Disabilities (PCEPD)** - 1111 20th Street N.W., Washington, DC 20036-3470. Telephone: (202) 653-5044.

**Transition Research Institute at Illinois** - College of Education, University of Illinois at Urbana-Champaign, 61 Children's Research Center, 51 Gerty Drive, Champaign, IL 61820. Telephone: (217) 333-2325.

**Virginia Commonwealth University Rehabilitation Research and Training Center on Supported Employment (RRTC)** - RRTC, Virginia Commonwealth University, 1314 W. Main Street, Richmond, VA 23284-2011.

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# Whole Life Planning

A Guide for Organizers and Facilitators



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## Acknowledgements

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| <u>School</u>                              | <u>Community Partner</u>                 |
|--|--|
| Brookline Public Schools                   | Brookline Adult and Continuing Education |
| Boston Public Schools                      | Boston Private Industry Council          |
| Middleboro Public Schools                  | Community Partnerships, Inc.             |
| Holyoke Public Schools                     | FOR Community Services, Inc.             |
| Southwick-Tolland Regional School District | Aditus, Inc.                             |
| Waltham Public Schools                     | G.W.A.R.C., Inc.                         |

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# Whole Life Planning

## A Guide for Organizers and Facilitators

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## Whole Life Planning

### A Guide for Organizers and Facilitators

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Some form of planning is involved in most of our important life decisions. Where should I go on vacation this year? Should I change jobs? Events may not always turn out as planned, but we do not neglect the planning process because of that. We make new plans.

Plans made in one area of our lives affect other areas. Where we live influences the kind of work available to us, and vice versa. Making one big purchase may mean postponing another purchase, and so on.

Many times we turn to others for advice, information, and guidance in making our plans; people we know and trust. These may include people with whom our lives are closely linked, so we plan for *our* vacation or where *we* will live. Our relationships are partly the result of our plans, and are partly the resources we use to develop and implement new plans.

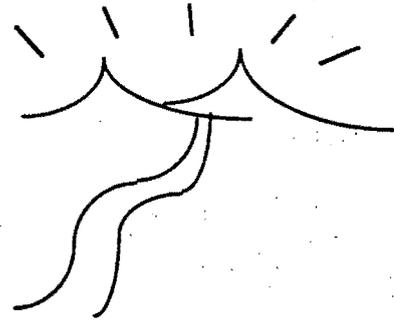
To *implement* our plans, we sometimes seek the services of paid professionals -- counselors, doctors, travel agents, tax accountants, and so forth. And we receive a good deal of support on an informal, unpaid basis as well, from friends, family members, co-workers, and neighbors. To *develop* our plans, we tend to rely more on help from people in this informal network -- people who care about us without being paid to, who know us well, and whom we trust.

People with disabilities may need particular assistance with life planning because:

- The life alternatives available have traditionally been limited to a narrow range,
- Expectations for life goals and achievements have tended to be low, and
- Many individuals need assistance with articulating their vision for the future and with the process of making decisions.

## What is Whole Life Planning?

Several alternative approaches to planning have been developed in recent years, referred to as personal futures planning, lifestyle planning, or outcome-based planning (Beeman & Ducharme, 1988; Bolles, 1989; Mount & Zwernik, 1988; O'Brien, 1987; Steere, Wood, Pancsofar, & Butterworth, 1990). These approaches share several features:



- A focus on the preferences, talents, and dreams of an individual rather than needs or limitations;
- An emphasis on the contributions and participation of the person with a disability and significant others from their life in the planning process, usually in a group meeting format;
- Defining an unrestricted vision of the lifestyle the individual would like to have and the goals needed to achieve that vision;
- Identifying the supports and/or resources an individual needs to reach his or her goals;
- Organizing resources and supports that are as local, informal, and generic or "non-professional" as possible to implement plans.

This guide incorporates these features into a person-centered planning approach. It relies on the involvement of a small group of committed people who are willing to act as advocates and resources to the focal person. It emphasizes involvement of family, friends, and community members.

Whole life planning is *not* a meeting. There can be whole life planning without meetings and meetings without whole life planning. It may involve one or more gatherings of small and large groups of people, but the core of whole life planning involves forging new relationships between people and their communities. In the example above, it was not until the third gathering that it became clear to Stan and his friends and family that a group home would not meet his priorities and a new vision began to form. At this point, the group called on community resources like the town engineer to help in designing an "in-law apartment" in accordance with town zoning requirements, and began to implement Stan's vision.

The sequence of steps is designed to help a planning process begin with a clear vision for the future, and, once that has been clearly defined, progress to setting specific action steps. We encourage you to follow the steps in order as presented to ensure that plans are based on the individual's vision for the future and not the convenience of available resources. Effective brainstorming relies on an unrestricted view of the alternatives! Within each step, the manual presents examples of variations that can be made.



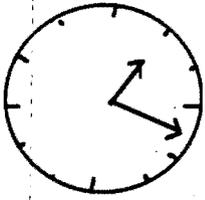
- Friends and acquaintances,
- Co-workers or classmates,
- Neighbors,
- Professionals or business people, such as teachers, doctors, shopkeepers,
- Members of any social, religious, or civic organizations the individual is connected with.

A useful tool for mapping the significant people in an individual's life is the Social Network Interview. A guide for conducting a social network interview and sample form are included with this guide as an Appendix.

Selecting a planning group is not just a matter of "rounding up the usual suspects." Effective whole life planning relies on a group that is chosen by the individual and primarily represents family, friends, and community resources. Each guest list reflects the style of the focal person. One person may prefer a small meeting while another enjoys a gala event.

Some individuals may know people in the community but not by name. Jim liked to talk with two women who worked at a neighborhood photocopy shop and wanted to invite them to a planning meeting, but didn't know their names. John went to the shop with Shirley, the organizer, and Jim pointed out the individuals. Introductions were made, and John invited the women to his meeting.

Disability program staff and professionals may be invited for their knowledge, expertise, and connections. They should not be selected to represent a particular agency. And it is extremely important that professionals not dominate the meeting by their sheer numbers. Two examples are shown on the following page.

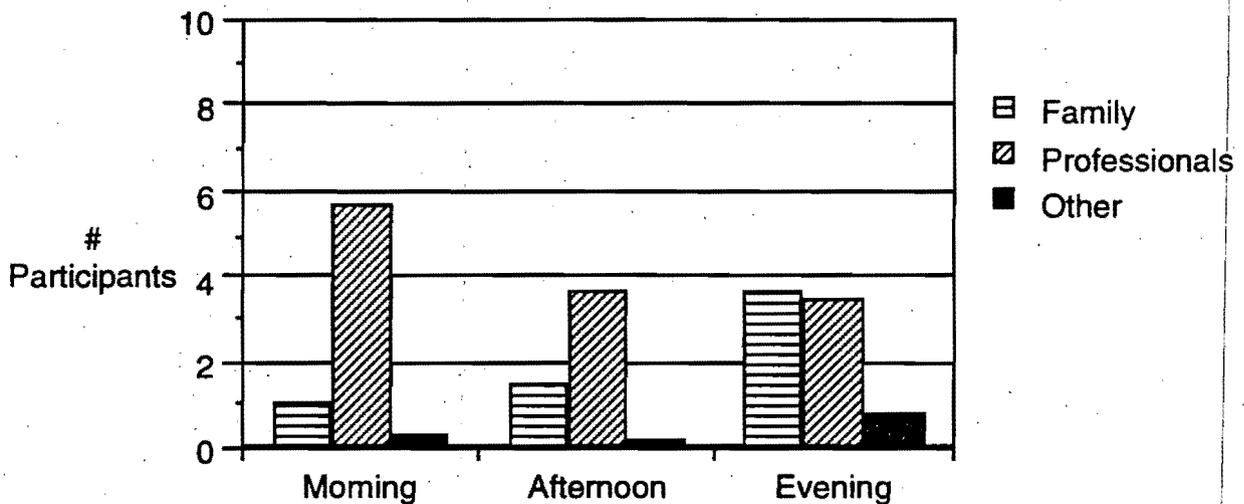


and their family.

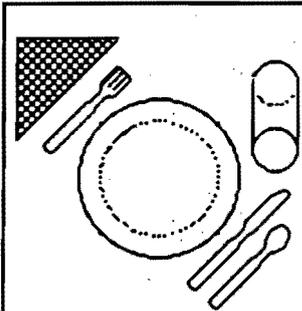
**When.** The day of the week and time of day are important considerations in planning, and an organizer needs to be willing to schedule meetings at non-typical times. Evenings or weekends are often best for a person

Bill held his planning meeting on a Sunday afternoon at home. It was important to him that his parents, Uncle Jack, Aunt Janice, grandparents and teacher attend his planning meeting. Sunday afternoon happened to be the best time for everyone to meet. They made his planning meeting a family get together, complete with Sunday dinner.

The time of day a meeting is held will affect who attends. The chart below reflects our experiences on participation in whole life planning meetings in a statewide demonstration project. Professionals dominated morning meetings, but evening meetings showed more of a balance among family members, other informal support people, and professionals.



The comfort level and style of a meeting is also established by the way people are greeted as they arrive, the availability of food and drink, and the way the meeting is set up (e.g. formally around a table or casually sitting around the living room). Meetings around snacks or a potluck supper provide a relaxed atmosphere, and also give participants an opportunity to contribute.



Food and drink add to the positive atmosphere of a gathering. Carmen held her initial group meeting in the kitchen of her sister's apartment at dinner time. About halfway through the meeting the participants broke for lasagna and salad. During dinner Carmen's parents talked about their fears about Carmen going to work in a way they were not comfortable doing in the meeting itself. Participants returned to the table energized, and with new insights from dinnertime conversation.

### Meetings and Alternative Formats

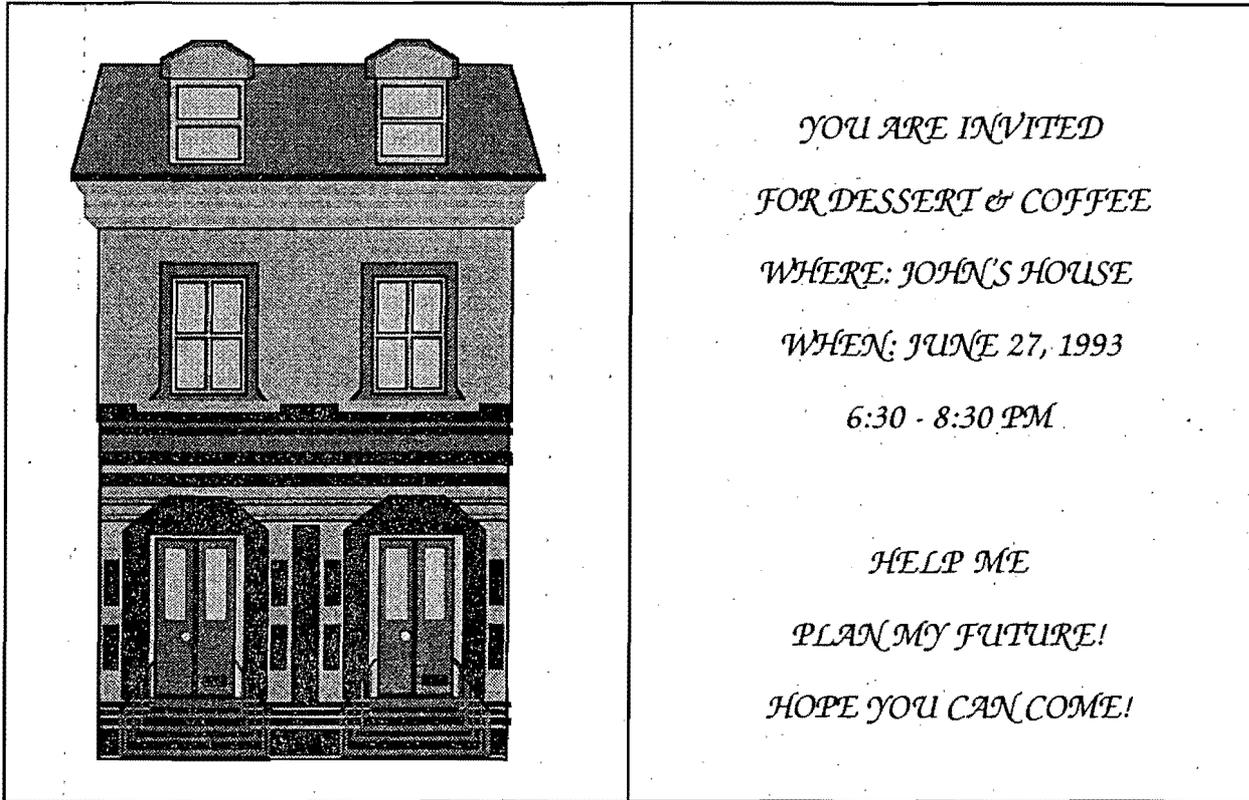
As the examples show, many times whole life planning is conducted as one or more group meetings. Meetings can be especially valuable for several reasons.

- Different people with different perspectives are brought together.
- Groups can brainstorm, with one person's idea stimulating new ideas that people would not have thought of otherwise.
- Commitments in a group meeting are made in a publicly recognized way.
- Participating in a planning group helps members to appreciate and support the vision and goals of the individual.

We recommend a group meeting format whenever there is not a strong reason not to use a group. But sometimes there is such a reason. Some people dislike being the center of attention at a group meeting, and sometimes not all those invited may be able to agree on the same time and place. Several alternatives can be considered.

- Individual meetings between the person and each member of the planning group, with the organizer assisting the person to put the pieces together into an overall plan.
- A series of interviews of key people by the organizer, who then reports back and meets with the individual.

dessert get together using the classroom computer. John then handed invitations to the people he wanted to invite.



The checklist on page 14 provides a reference for some of the major things that make planning successful.

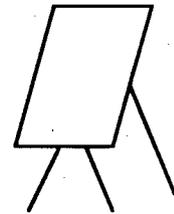
## The Role of the Facilitator

Facilitating planning meetings requires care and thought. An effective facilitator:

- Has good listening skills.
- Is able to actively involve all of the participants.
- Facilitates creative thinking by providing a clear vision of an inclusive community and flexible supports.
- Maintains the group's focus on positive visions rather than potential problems.
- Remains neutral regarding options and strategies.

The facilitator's role is to lead the group through the process by:

- Explaining the agenda and purpose.
- Facilitating participation of the focal person.
- Assuring full participation by family members, friends, and community members.
- Managing conflict or disagreement among participants.
- Setting and maintaining ground rules for group interaction.
- Asking open ended questions to generate a complete record of key life experiences, preferences, and choices.
- Recording all comments (unless another individual serves as recorder).
- Ensuring the meeting begins and ends on schedule.



Some facilitators have training or experience in this type of planning activity, but attitude and approach are more important than experience. Most important is that the individual is comfortable with who is selected. Perhaps second in importance is the ability to think creatively and positively. When someone in a disability service role -- a teacher, case manager, or other program staff person -- is the most logical individual to facilitate the meeting, it is important to make sure the individual is able to fully step outside of their usual employment role for this purpose. An individual in the community with expertise in group process and/or career planning for people without disabilities, or a family member or family friend can also be asked to serve as facilitator.

Sometimes an individual can be identified to begin as a co-facilitator or recorder who then can become comfortable with facilitating future planning sessions on his or her own.

### Good Things to Say

- ✓ *Tell us more about that...*
- ✓ *Why do you think that is?*
- ✓ *What did you like best about that? Why?*
- ✓ *What was it about that you didn't like?*
- ✓ *Can you give us an example?*
- ✓ *That's a great comment...idea...insight...*

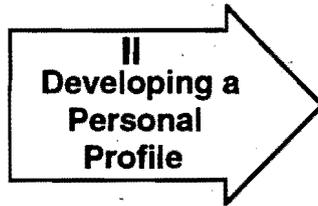
### Starting and Ending Meetings

The way a planning process or meeting begins establishes the style and tone for participants' interaction. Be prepared to provide a written (printed or on flip chart paper) or verbal agenda, establish some ground rules for participants, and clearly define the purpose of the meeting so that participants know why they are there.

### Sample Purpose Statements

- ☞ *To help the individual to better define a personal vision of what he or she wants to be and do (either in general or in relation to a specific issue or life transition)*
- ☞ *To identify and recruit resources, and supports to help him or her reach that vision. These resources may include the school, family, friends, workplaces, community or social groups, or other relationships.*
- ☞ *To help the individual develop new relationships, strengthen existing relationships, and play a positive role in community life.*

The agenda for a meeting may follow the structure outlined in the following sections: Personal Profile, Developing a Vision, and Action Planning. Alternatively you might combine the steps and organize the process by life area. Formats for both of these approaches are provided as an Appendix.



## II Developing a Personal Profile

The personal profile is a comprehensive inventory of the places, people, and activities in a person's life. The purpose is to gain a deeper understanding of the individual's preferences, dislikes, and choices. Information from one part of a person's life may provide important clues to the vision and standards for other parts of their life. For example, preferences and choices at home may provide insight to the kind of work situation a person would enjoy.

### Two Approaches to the Profile

The profile can be developed with a planning group, or it can be developed ahead of time with the focal person and possibly his or her family as part of the organizing phase. Developing it with the group may provide a richer experience and prepare participants to be more open to a range of possible plans. However, it will also take significantly more time, and it may be difficult to ensure that both the focal person and participants fully contribute.

Developing the profile ahead of time ensures that the focal person has control over the content, and will be a more efficient use of the larger group's time. The beginning of the meeting can be used to share this information with the larger group, and to update or expand on the information. The focal person may also use this opportunity to prepare a personal statement using words, pictures, or videotape for the group. The group can then step relatively quickly into action planning. Allow the focal person to decide which of these two approaches best suits them.

Sally was concerned that her personal priorities differed somewhat from those of her family and, she felt, from those of some of her teachers. She developed a personal profile with the facilitator and prepared a brief statement about her goals and priorities for her life. When the planning group convened, she began the meeting with her statement of priorities, followed by a review of the profile information.

### Organizing the Profile

It helps to organize the profile by major segments of the person's life to make sure that you cover everything. Once the conversation gets rolling, your job is to keep it going and tease out the details. The headings below can serve as an organizing outline.

### Personal History: Things to Ask

- ✓ *What are the key milestones in your life?*
- ✓ *What major moves or transitions have you made?*
- ✓ *How has your health been? How is it now?*
- ✓ *What have been the most important positive experiences in your life?*
- ✓ *What have been the most difficult experiences?*

**Relationships (optional).** Share the map of relationships and significant others developed while organizing the planning process. Ask participants for additional members or input:

- ☞ Family (Immediate and extended)
- ☞ Friends (Personal friends, Family friends, School, work, ...)
- ☞ Community resources (Church, recreation or social groups, ...)
- ☞ Professional supports and services

### Relationships: Things to Ask:

- ✓ *With whom do you spend the most time with on a daily and weekly basis?*
- ✓ *Are there other important people in your life that you spend time with only occasionally?*
- ✓ *Who are your friends and allies?*
- ✓ *Who will act as an advocate for your interests?*
- ✓ *Who do you go to for help or advice?*

**Life areas.** The discussion should spend a substantial amount of time on each major area of the focal person's life. It usually helps to address one life area at a time, although these discussions are rarely completely linear and the facilitator should be prepared to move around as appropriate. If you are using flip chart paper it is also helpful to reserve a sheet for general comments and observations that cross over life areas. As a point is made, or a pattern becomes clear, then it can be highlighted there.

One way of ensuring a comprehensive discussion is to begin with an inventory of all of the activities a person engages in within that life area. This can be summarized if the profile is completed prior to the group meeting. Once the inventory is complete, then likes and dislikes can be catalogued for each activity. Be careful to explore the reasons for preferences. Often why a person like or dislikes something is more important than the activity itself. A facilitator should ask "why" frequently.

| Work  |  |  |
|---|--|--|
| Job History   | Likes  | Dislikes   |
| School Library<br>•slash cards<br>•Stamp Cards<br>•Straighten shelves | -slashing cards<br>-fun to use pen<br>-sit at desk   | doing same job all day                           |
| Town Hall Cafeteria   | -water sprayer<br>-moving fast<br>-wearing uniform<br>-food (lunch)  | -not being able to sit down<br>-standing all day |
| School Cafeteria  | -co-workers<br>-walking to work (not too far)<br>-having drinks at work<br>-hours working (10-1)<br>-sitting down during down time |  |
| Middle School Office<br>•File cards & letters                         | -fun to play cards<br>-work with boyfriend   | -working alone                                   |

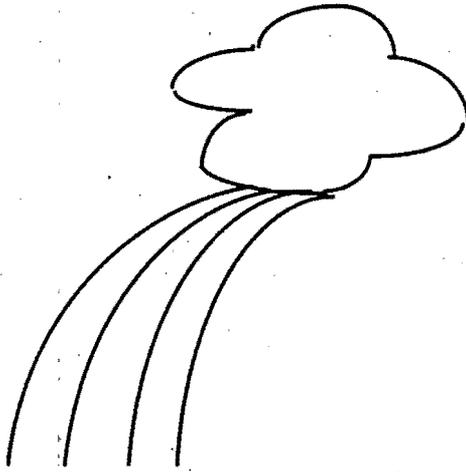


*private-label manufacturer. The business sells that soap locally and nationally. You appear on the Oprah Winfrey show. You invite me to be on the show with you and I am nervous but accept.*

*Love,*

*Seth*

Vision statements can be developed as narratives, as in the case of Seth's contribution to Jennifer's plan, or they can be detailed lists of critical features of a life area such as in Jim's vision of work life, below. Both of these vision statements establish clear boundaries that define whether or not you have made it. They also are not too restrictive. Many jobs or workplaces could meet Jim's standards.



### **Vision for Work: Jim**

#### **People**

- opportunities to make friends
- work in a group or team

#### **Work**

- keep busy and active
- work with machines
- have a clear finished product

#### **Appreciation**

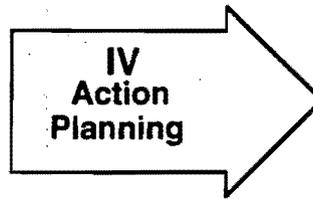
- be recognized for work
- good pay

#### **Structure**

- clear responsibilities
- tasks that are fairly easy to learn

#### **Schedule**

- no early hours



**IV  
Action  
Planning**

Visions have little meaning unless something happens to implement them. Whole life planning can be a powerful catalyst for change in an individual's life. Change can't happen, however, unless planning results in *specific* and *immediate* actions. It is important that action steps are agreed to and put in writing, with an individual assigned to implement them. It may be helpful to designate a time frame or set a follow up meeting to discuss progress.

*Being on the wire is living... anything else is just waiting.*  
-- Karl Wallenda

Action steps can include:

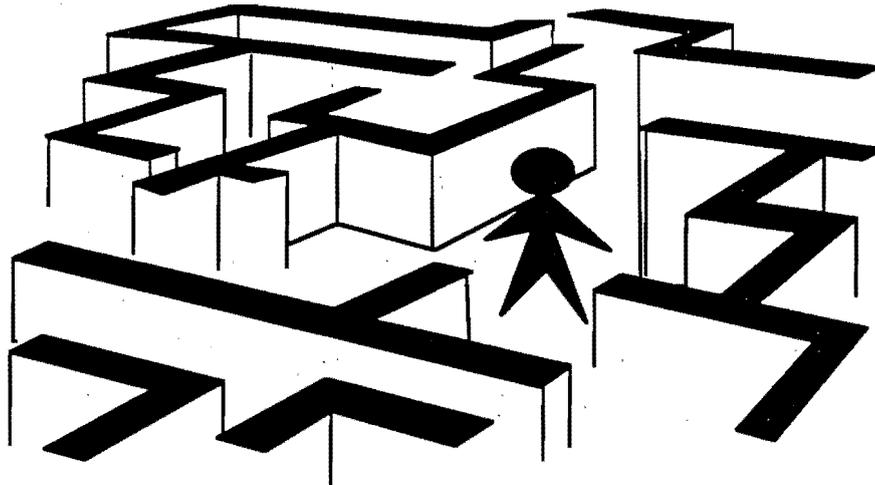
- Steps the focal person can take,
- Steps others helping with the planning can take,
- Steps others in the community can be asked to take, and
- Steps schools or service provider agencies can be asked to take.

**Action Planning: Things to Ask**

- ✓ *What would it take to accomplish ...?*
- ✓ *What are the next steps towards these goals?*
- ✓ *Who is the most logical person to take each step?*
- ✓ *Who else do we need to get involved? Who are the experts? Who knows them?*
- ✓ *What can each person commit to?*

The summary below, from Ben's planning session in the area of school, follows a format that is particularly effective at generating action plans.

| <b>School</b>            |   |  |
|--------------------------|---|--|
| Preferences              | Vision  | Action Plans   |
| likes being with friends | more friends at high school                     | arrange to be in regular home room<br>get involved in school activities - Judy |
| likes baseball           | wants to be involved in baseball at high school | obtain information regarding baseball team - Gail Mc.                          |
| likes American history   | take American history course                    | enroll in Mrs. T's American history course in fall - Judy                      |



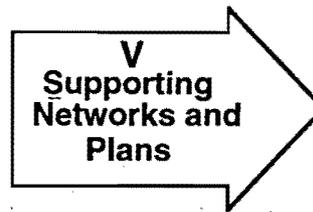
In our project, many students had the same dreams as their high school peers: Dating, having money, getting a car, going to college, and similar goals.

How many life areas are included in a plan, and how far into the future planning extends, are highly individualized. Some adolescents or adults just beginning to think about the future might begin with fairly immediate planning needs. Dan's strongest wish was to publish a story in the town newspaper. John wanted help getting into a karate class and to begin dating girls. The notion of planning his "whole life" was too formidable and abstract. As planning evolves, longer term issues may arise. John's mother was very surprised to find, during his second meeting, that John had thought about what would happen when she died.

### **Strategizing**

As the facilitator assists the planning team to develop strategies, the following suggestions may be helpful:

- Use the network resources of each and every member. Ask the kind of questions that get members thinking "Who do I know who can help?"
- Consider adding new members to the planning group who have expertise or connections in a desired area, or asking them for help with a specific task.
- Break action plans down into smaller, more manageable steps. Ask, "How can we begin to reach this goal?"
- Whenever possible, consider generic resources before those that are more specialized. Generic services are usually easier to access, available to everyone, and involve less "red tape". They also represent the way most people get what they need.



Based on the action plans they have developed, the planning group may decide to continue to meet periodically to monitor and coordinate progress and solve problems, or may choose to disband and implement plans individually. Either way, a clear plan for ongoing support and follow-up is needed. This may include both the informal supports from family, friends, and community and formal supports, including professional services and changes in school curricula.

The role of the facilitator may now begin to evolve into that of a coordinator, keeping in touch with members and monitoring progress; or another person (family member, friend, or the individual him/herself) may want to assume these responsibilities.

Follow-up meetings can provide updates to members of the planning group and provide opportunities to develop new strategies and ideas. Each time the group meets, notes from the previous meeting are reviewed. The group shares information on "what was done" and "how things went". New action plans or goals can then be developed if needed. New members to the planning group may be invited to join the planning group as goals evolve in new directions or new connections are made.

Stan and his family were interested in building an addition to their house for him to live in after he graduated from high school. Stan's family and friends met regularly as they explored creative options to achieve his dream. Building plans were developed; grants and donations were sought for building materials; and funding for personal care assistants were investigated. As the group investigated options, they contacted a diverse group of professionals and organizations for assistance which included architects, service groups, legislative aides, the zoning board, independent living groups, etc.

Some whole life planning groups may choose to meet on a regular basis to provide ongoing support or work toward a long term goal. These groups evolve into a "circle of support".

Some whole life planning groups break into subcommittees to work on specific projects, and arrange to meet again to discuss progress. In other cases, the person may decide to reconvene group when the need for a new plan arises.

**Final Words  
(or....who is this for, anyways?)**

*If one advances confidently in the direction of his dreams, And endeavors to live that life which he has imagined, he will meet with a success unexpected.... If you have built castles in the air, your work need not be lost. That is where they should be. Now put the foundations under them.*

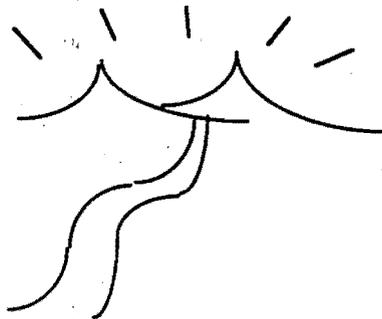
-- Henry David Thoreau

Some people find it difficult to separate whole life planning from agency service planning. To make matters worse, some agencies have begun to use or mandate a process that seems similar or uses the same language. As we have noted, the goals and visions of the whole life plan should provide guidance for the development of agency-driven planning documents. However, the whole life plan is broader in scope and not confined by an agency's mission and resources. Goals of a whole life plan may be met through traditional service delivery or through creative, non-traditional means. At times the goals may be overtly at odds with agency resources or priorities.

No process required and controlled by an agency can truly be a whole life planning process. No plan recorded on an agency form and filed in an office file cabinet can truly be a person's plan.

At its heart, whole life planning is an interactive process, not a product. No official document is produced, the results do not legally bind anyone to doing anything. The success of the process rests on the flexibility and creativity of the people in an individual's life who care about him or her, including family, friends, community relationships, teachers, and other professionals.

Because it is such an individual process, the structure and flow vary considerably from person to person. Whole life planning calls upon organizers and facilitators to be flexible, creative, and sensitive to the participants and the focal person. Most of all, whole life planning is a lot of fun.



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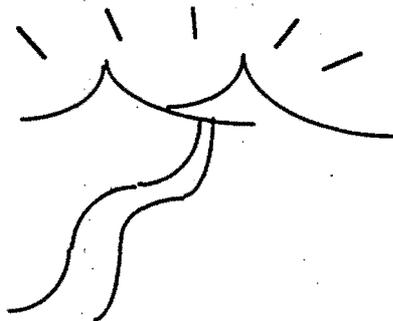
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## Appendices

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Social Network Interview Guide  
Sample Chartpaper Layouts: Format A  
Sample Chartpaper Layouts: Format B



## Social Network Interview Guide

Column A: Ask the questions below and enter each name mentioned, showing the individual what you're writing.

Column B: List each person's relationship to the interviewee:

- R = Relative: Family member or other kin, including "in-laws";
- S = Staff: Paid human service worker, including respite or family care provider if paid;
- F = Friend: Anyone not R or S, including acquaintances, co-workers, etc.
- \* = Friend is a special education student or a disability service consumer (if known)

Column C: Enter support types based on the indented questions. Use any available "props" or information about the individual to help the individual think of examples and situations that apply to each question.

- S = Socialization/Companionship
- T = Tangible/Material Help
- G = Guidance/Advice
- E = Emotional Support/Intimacy

Column D: X = At least one type of support is experienced as reciprocal.

Column E: For relationships coded F (friends) ask how or where the interviewee met the individual.

*Where do you live? Who lives there with you? Anyone else?*

*Which of these people do you like to talk with or do things with? (S)*

*If you need help with anything at home, like finding something, fixing something, or doing laundry (agree on some situations), who would you ask for help? Anyone else? (T)*

*Is there anyone you do things for at home to help them out? Anyone else? (X)*

*What do you do during the week? Who do you usually see there? Anyone else?*

*Which people do you like to talk to or do things with? Anyone else? (S)*

*Who do you like to have lunch or breaks with? Anyone else? (S)*

*If you needed help at work or school, (ask for examples: lifting something heavy, finding something, etc.) who would you ask? Anything else you need help with? Who helps? (T)*

*Is there someone who sometimes asks you to help them with anything at work or school? Anyone else? (X)*

*Have you ever forgotten your lunch or needed to borrow some extra money at school or work? (Discuss a situation that could apply.) Who could you ask? Anyone else? (T)*

*Is there anyone who might borrow money from you? (X)*

*What do you do after school or work? Who do you do that with? Anyone else?*

*What do you do on weekends? Who do you do that with? Anyone else?*

*Is there anyone else you go out and do things with? Anyone else you get together with for fun or to talk with? Last week, did you:*

|   | How many times? | Who were you with? |
|---|-----------------|--------------------|
| Visit someone at their home?            | H= _____        | "                  |
| Shop at a store or mall?                | S= _____        | "                  |
| Go to a restaurant, coffee shop or bar? | R= _____        | "                  |
| Go to the movies or a concert?          | M= _____        | "                  |
| Go to a sports event?                   | S= _____        | "                  |
| Go to a health facility like the YMCA?  | H= _____        | "                  |
| Go to a party or dance?                 | P= _____        | "                  |

*Which of these people (review names from last 4 questions) do you like to talk with or do things with? (S)*



# Sample Chartpaper Layouts: Format A

| HOME                  |       |          |
|-----------------------|-------|----------|
| Activities & Routines | Likes | Dislikes |
|                       |       |          |

| SCHOOL               |       |          |
|----------------------|-------|----------|
|                      | Likes | Dislikes |
| Classes              |       |          |
| Activities/<br>Clubs |       |          |

| WORK                    |       |       |          |
|-------------------------|-------|-------|----------|
| Jobs & Work Experiences | Tasks | Likes | Dislikes |
|                         |       |       |          |

| LEISURE    |       |          |
|------------|-------|----------|
| Activities | Likes | Dislikes |
|            |       |          |

**Sample Chartpaper Layouts: Format B**

| RELATIONSHIPS |         |
|---------------|---------|
| Family        | Friends |
| Professionals | Others  |

| HOME        |        |              |
|-------------|--------|--------------|
| Preferences | Vision | Action Plans |
|             |        |              |

| SCHOOL      |        |              |
|-------------|--------|--------------|
| Preferences | Vision | Action Plans |
|             |        |              |

| WORK        |        |              |
|-------------|--------|--------------|
| Preferences | Vision | Action Plans |
|             |        |              |

THE WHITE HOUSE

WASHINGTON

July 18, 1994

Carol Tashie  
University of New Hampshire  
Institute on Disability  
Concord Center, Suite 318  
Concord, NH 03301

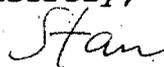
Dear Carol:

Thank you for sending me the draft of the "Best Practice Indicators" which I read with great interest.

I look forward to receiving a copy of other materials on transition issues as they are developed. Your assistance is appreciated.

With best wishes.

Sincerely,



Stanley S. Herr  
Kennedy Public Policy Fellow

# UNIVERSITY OF NEW HAMPSHIRE

Institute on Disability/UAP  
Turning Points Project  
The Concord Center, Suite 318  
10 Ferry Street, Unit #14  
Concord, New Hampshire 03301-5019

Telephone (603) 228-2084  
FAX (603) 228-3270

May 13, 1994

Dear Stan,

I am sending you a very rough draft of the "Best Practice Indicators" that are being developed in New Hampshire. These indicators address many of the issues that affect students and young adults with disabilities as they move through school and into the world of adulthood. I hope this is useful to you,

Please feel free to contact me if I can be of any further assistance. I will send you relevant materials as they are developed.

Sincerely,



Carol Tashie

## **HIGH SCHOOL STUDENTS BEST PRACTICES STUDENTS 16-18 YEARS OF AGE**

- 1.) Students attend only regular classes during their school day and receive support to enable them to do so.
  
- 2.) Students participate in career planning and preparation in the same fashion as typical, same-aged peers at their high school and receive supports to enable them to do so.
  
- 3.) Students participate in school sponsored typical extracurricular activities and interact with same-aged peer friends in and out of school on a regular basis. They are provided with the supports to enable them to do so.
  
- 4.) Students make choices and direct their own lives related to classes, career planning and preparation, friends and social activities to the same degree as their same-aged peers and are provided support to do so.
  
- 5.) Families support their sons and daughters regular class inclusion, career planning and preparation, typical leisure and social life, and self-direction and are provided with the support to do so.
  
- 6.) Staff focus on promoting the capacity of natural support sources (families, peers, regular education teachers) to support students.

**ROUGH DRAFT  
PLEASE DO NOT DISSEMINATE**

## SCHOOL AND CLASS INCLUSION

**BEST PRACTICE: ALL STUDENTS WHO ARE 16-18 YEARS OF AGE TAKE A REGULAR SCHEDULE OF CLASSES.**

### STUDENT OUTCOME INDICATORS:

YES

- 1.) Students attend only regular classes during their school day. \_\_\_\_\_
- 2.) Students attend a regular homeroom and is assigned to the homeroom in the same fashion as other students. \_\_\_\_\_
- 3.) Students receive grades and credits for each class taken. \_\_\_\_\_
- 4.) Students progress through the same grade level system (freshman, sophomore, junior, senior) as other students. \_\_\_\_\_
- 5.) Students receive a diploma upon graduation. \_\_\_\_\_
- 6.) If the school has a student advisory system, students are assigned advisors that are not a member of the special education staff. \_\_\_\_\_
- 7.) Student schedules are determined based on graduation requirements, career planning, and interests. \_\_\_\_\_
- 8.) Students use the same tools and environments in the school as typical students:
  - a.) students carry class assigned books to class. \_\_\_\_\_
  - b.) students are assigned a locker in the same fashion as other students and use it to keep books, jacket and other personal belongings. \_\_\_\_\_
  - c.) students go to the school nurse when sick. \_\_\_\_\_
- 9.) Students do not leave their regular classes to participate in community-based instruction, unless it is an activity in which their typical peers engage as part of their regular school program and for which they receive credit. \_\_\_\_\_

### SUPPORT INDICATORS

- 1.) Special education teachers and staff serve as inclusion facilitators and consult with classroom teachers on a regularly scheduled basis. \_\_\_\_\_
- 2.) Regular education teachers receive training that will permit them to successfully include and teach students. \_\_\_\_\_
- 3.) District and school administration take an active leadership role in the supports of the inclusion of all students. \_\_\_\_\_
- 4.) Students are interacted with by all staff in a fashion consistent with the manner in which they would interact with typical high school students. This includes topics discussed, language used, and voice tone. \_\_\_\_\_
- 5.) Related services are provided in natural environments and on a schedule that will not interfere with students' regular class schedule. \_\_\_\_\_

## STUDENT SOCIAL CONNECTIONS AND FRIENDSHIPS

**BEST PRACTICE: THE FACILITATION OF FRIENDSHIPS AND SOCIAL CONNECTIONS IS A TOP PRIORITY.**

### STUDENT OUTCOME INDICATORS YES

- 1.) Students participate in school sponsored extracurricular activities: \_\_\_\_\_  
a.) Students belong to a club or organization.(Unless the student has expressed a clear lack of interest in joining a club).  
b.) Students regularly attends games, dances, plays. (Unless the student has expressed a clear lack of interest in attending these events)
- 2.) Students eat lunch with another student or other students without disabilities. \_\_\_\_\_  
Not just in the physical presence of these students, but as a lunch partner.
- 3.) Students receive and place phone calls to typical peers several times a week. \_\_\_\_\_
- 4.) Students participate in typical age-appropriate activities after school and on weekends. \_\_\_\_\_
- 6.) Students spend time with peers from school after school or on weekends on a regular basis. \_\_\_\_\_

### SUPPORT INDICATORS YES

- 1.) Friendship and social connections are addressed in the IEP/ITP and future's planning meetings for students. \_\_\_\_\_
- 2.) Students are assisted and facilitated to take the lead in identifying, choosing, and arranging for their participation in extracurricular activities. \_\_\_\_\_
- 3.) Staff provide consultation to the school organizations to enable them to provide access to a student with a disability. \_\_\_\_\_
- 4.) Staff provide actively encourages students to participate in school organizations and activities. \_\_\_\_\_
- 5.) Staff provides level and type of support necessary to ensure that students participates in school extracurricular activities. \_\_\_\_\_
- 6.) Staff actively uses strategies to facilitate the connection and friendship of students to their peers. \_\_\_\_\_
7. Staff provides information and active support to families to enable them to encourage and assist their sons and daughters to be involved in regular extracurricular activities and to make friends with typical peers. \_\_\_\_\_
- 8.) The school does not sponsor leisure activities for groups of students with disabilities. \_\_\_\_\_

## STUDENT CAREER PLANNING AND PREPARATION

**BEST PRACTICE: STUDENTS ARE PROVIDED THE SAME CAREER PLANNING AND PREPARATION OPPORTUNITIES AS TYPICAL STUDENTS**

### STUDENTS OUTCOME INDICATORS:

YES

- 1.) Students meet with and obtain career planning assistance from guidance and regular advisory staff. \_\_\_\_\_
- 2.) Students take regular education courses related to career planning. \_\_\_\_\_
- 3.) Students utilize resources available to other students related to vocational assessment and evaluation. \_\_\_\_\_
- 4.) Students can take any vocational education courses in which they are interested. \_\_\_\_\_
- 5.) During their high school career students work after-school, week-ends and during the summer. \_\_\_\_\_
- 6.) Students take academic courses that are required or will enhance their career path goals. \_\_\_\_\_
- 7.) Students career planning includes obtaining information on post-secondary educational and training programs. \_\_\_\_\_

### SUPPORT INDICATORS

- 1.) Special education staff collaborates with guidance staff to enable them to provide active systematic career planning and to use this approach with typical students. \_\_\_\_\_
- 2.) Special education staff collaborates with regular education staff to develop a Career Planning Course and Career Portfolio approach for all students. \_\_\_\_\_
- 3.) Special education staff collaborates with vocational evaluation personnel to enable students to obtain assessment information that will contribute to their career planning. \_\_\_\_\_
- 4.) Staff assist and support by students to obtain and maintain after-school, week-end and summer employment. \_\_\_\_\_
- 5.) Staff actively assist students to view post-secondary education as a viable means of pursuing their future career and to obtain information that will permit them to determine if they wish to pursue this option and how to do so. \_\_\_\_\_

## **POST-SECONDARY-AGED YOUNG ADULTS AGES 19-21 BEST PRACTICES**

- 1.) Young adults do not attend classes or have a physical presence at the high school building.
- 2.) Young adults are employed and/or attend a regular and fully inclusive post-secondary education or training program and are provided the supports to do so.
- 3.) Young adults participate in typical young adult leisure activities and connect and have friendships with same-aged peers and are provided the supports to do so.
- 4.) Young adults manage their personal needs and business as independently as possible and are provided the supports to do so.
- 5.) All sources of support, including those of the school, those targeted for persons with disabilities, and generic resources, are accessed and combined to enable young adults to participate successfully in work, post-secondary education, leisure, home, and community environments.
- 6.) All sources of specialized supports are aimed at enhancing the capacity of generic and natural resources (e.g. peers, community members, families, employers, college instructors) to support the young adult.

## NATURALLY SUPPORTED EMPLOYMENT

**BEST PRACTICE: STUDENTS AND YOUNG ADULTS WILL BE ASSISTED TO FIND AND MAINTAIN EMPLOYMENT USING NATURALLY SUPPORTED STRATEGIES**

### STUDENT/YOUNG ADULT OUTCOME INDICATORS: YES

- 1.) Students/young adults earn a regular wage. \_\_\_\_\_
- 2.) Students/young adults work the number of hours they desire. \_\_\_\_\_
- 3.) Students/young adults work with and in the presence of coworkers. \_\_\_\_\_
- 4.) Students/young adults take breaks with coworkers. \_\_\_\_\_
- 5.) Students/young adults interact during work and breaks at the same approximate level as other coworkers. \_\_\_\_\_
- 6.) Students/young adults express satisfaction with their job. \_\_\_\_\_
- 7.) Students/young adults are trained and supported by their coworkers. \_\_\_\_\_

### SUPPORT INDICATORS

- 1.) Significant attention is given to the interests of students when identifying the type of job and career to pursue for students and young adults. \_\_\_\_\_
- 2.) The staff who will facilitate the employment of students and young adults will use a planning process that focuses: on getting to know the person in various environments (home, school, community) and a thorough knowledge of the person's interests, gifts, and personal history. \_\_\_\_\_
- 3.) Staff actively work to involve the family of the student or young adult to the greatest extent possible in all phases of the planning for, job search for, and employment of the student and young adult. \_\_\_\_\_
- 4.) The student or young adult is actively assisted to take as great a lead as possible in the career planning, job search, and employment of the individual. \_\_\_\_\_
- 5.) Staff will attempt to develop active relationships with businesses, rather than focusing on cold call job placement strategies. \_\_\_\_\_
- 6.) Staff identify and use student, family, and friend connections in the job search process. \_\_\_\_\_
- 7.) Employment Facilitators emphasize the work culture, support capacity and social opportunities when assisting students or young adults to determine \_\_\_\_\_

to apply for or accept a job.

8.) Employment Facilitators proactively work to enhance students and young adults social integration, inclusion and connection at their job. \_\_\_\_\_

9.) Employment Facilitators function primarily to develop the capacity of the business to train and support students and young adults, rather than to provide direct job coaching, training, intervention or supervision. \_\_\_\_\_

10.) Students and young adults are supported to change jobs based on job dissatisfaction and changing or evolving career interests. \_\_\_\_\_

## POST-SECONDARY EDUCATION AND TRAINING

**BEST PRACTICE: YOUNG ADULTS ARE PROVIDED WITH THE SUPPORTS NEEDED TO PERMIT TO ATTEND REGULAR POST-SECONDARY EDUCATION AND TRAINING PROGRAMS**

### YOUNG ADULT OUTCOME INDICATORS: YES

1.) Students will have access to and will attend the full range of post-secondary options opened to typical students including 4-year public and private colleges, 2 year technical and junior colleges, occupational specific, short-term certificate programs, full-time to one course enrollment, continuing and adult education courses, and living on or off campus. \_\_\_\_\_

### SUPPORT INDICATORS

1.) Students will be encouraged to consider the full range of post-secondary options opened to typical students including 4-year public and private colleges, 2 year technical and junior colleges, occupational specific, short-term certificate programs, full-time to one course enrollment, continuing and adult education courses, and living on or off campus. \_\_\_\_\_

2.) School district, adult agency (those which target persons with disabilities), generic (educational scholarship and loan programs available to typical students), and student and family resources should all be accessed and used collaboratively to provide the support the student will need to successfully attend a post-secondary program. \_\_\_\_\_

4.) School districts will readily offer assistance to post-secondary instructors related to curriculum modification and accommodations, assistance to staff and natural supports such as fellow students related to how to support the students, and where needed direct classroom, personal care and work completion supports. \_\_\_\_\_

## YOUNG ADULT COMMUNITY CONNECTIONS AND FRIENDSHIPS

**BEST PRACTICE: YOUNG ADULTS WILL RECEIVE SUPPORT TO ENABLE THEM TO PARTICIPATE IN TYPICAL YOUNG ADULT LEISURE ACTIVITIES AND TO CONNECT AND HAVE FRIENDSHIPS WITH SAME-AGED PEERS**

|                                       |            |
|---------------------------------------|------------|
| <b>YOUNG ADULT OUTCOME INDICATORS</b> | <b>YES</b> |
|---------------------------------------|------------|

- |   |       |
|---|-------|
| 1.) Young adults participate in leisure activities that are age typical regularly and which are not organized specifically for persons with disabilities. | _____ |
| 2.) Young adults spend time regularly with same-aged peers regularly.   | _____ |
| 3.) Young adults receive or place calls to same-aged peers regularly.   | _____ |
| 4.) Young adults can identify several same-aged peers whom they consider friends and who are not paid.  | _____ |

### SUPPORT INDICATORS

- |  |       |
|--|-------|
| 1.) Staff from school and adult service agencies assist young adults to connect with generic and age-typical leisure activities.   | _____ |
| 2.) Staff facilitate young adults to connect with and develop friendships with typical young adults.   | _____ |
| 3.) Staff facilitate individuals involved with leisure activities and same-aged peers to support the young adults.   | _____ |
| 4.) Staff facilitate young adults to take the lead in identifying leisure activities in which they wish to participate, in accessing these activities, and in connecting with peers.             | _____ |
| 5.) Staff provide information and assistance to family members to encourage their support of young adults to participate in typical leisure activities and to connect with typical young adults. | _____ |

## YOUNG ADULT PERSONAL CARE AND BUSINESS PARTICIPATION AND INDEPENDENCE

**BEST PRACTICE: YOUNG ADULTS PARTICIPATE AND PERFORM AS INDEPENDENTLY AS POSSIBLE THOSE PERSONAL CARE AND BUSINESS ACTIVITIES PARTICIPATED IN BY THEIR SAME-AGED PEERS.**

### YOUNG ADULT OUTCOME INDICATORS

YES

- 1.) Young adults participate in and perform as independently as possible the same personal and home care activities as their same-aged peers (e.g. meal preparation, bathing, hair care, dressing). \_\_\_\_\_
- 2.) Young adults participate in and perform as independently as possible the same personal business activities as their same-aged peers (e.g. personal bank account; using public transportation, obtaining a ride from a friend, clothes shopping). \_\_\_\_\_
- 3.) Young adults direct and make decisions about the aspects of their lives as their same aged peers (e.g. clothes they will purchase and wear, time to go to bed, leisure activities in which they will engage, their friends). \_\_\_\_\_

### SUPPORT INDICATORS

- 1.) Staff provides instruction and support to young adults to enable them to participate in and perform as independently as possible their personal care. This instruction and support is provided in the natural settings in which they occur. \_\_\_\_\_
- 2.) Staff provides instruction and support to young adults to enable them to participate in and perform as independently as possible their personal business. This instruction and support is provided in the natural settings in which they occur. \_\_\_\_\_
- 3.) Staff facilitates and support young adults to direct and make decisions about their lives. \_\_\_\_\_
- 4.) Staff provides families information and encouragement to support their young adults participation and independence in personal care and business and in directing their own lives related to these issues. \_\_\_\_\_