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## Development and Preliminary Evaluation of a Transition Planning Guide

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DEVELOPMENT AND PRELIMINARY EVALUATION OF A  
TRANSITION PLANNING GUIDE

by

Shalee Thompson

A project submitted in partial fulfillment  
of the requirements for the degree

of

MASTER OF EDUCATION

in

Special Education

Approved:

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### **Abstract**

Transition planning for students with disabilities is often a difficult process for students, their families, and their teachers. Families are often unsure of how best to help their student and often feel unheard by the professionals with whom they are working (Defur, Todd-Allen & Getzel, 2001.) Teachers are also unsure of how to best implement transition planning strategies in the classroom (Thoma, Pannazzo, Fritton & Bartholomew, 2008). Transition planning is often poorly aligned with the desired end outcomes for students (Thompson, Fulk & Piercy, 2000) and parents and teachers lack systematic guidance in decision making for transition planning.

This project included the development and evaluation of a transition planning guide for parents and teachers of transition-age students with moderate to severe disabilities. Teachers and parents of students from Cache School District's high school and post high settings participated. A pre-experimental, pre-test post-test single case design was used to evaluate parents' and teachers' knowledge of and satisfaction with the process before and after using the transition planning guide. Before implementation, the transition planning guide was evaluated by experts within the field and revised accordingly. Teacher participants received training on the use of the transition planning guide prior to meeting with the parent and student. The use of the transition planning guide improved both knowledge of post-school options and satisfaction with the transition planning process for teachers and parents.

## INTRODUCTION

Transition from special education services to adult life for students with severe disabilities is a complex and time-consuming process. It can be overwhelming for students and their families. Teachers may be unsure of how to best guide families through the processes of guardianship, social security, the Division of Services for People with Disabilities, and accessing the many community resources available. Conversations about post-school life may be uncomfortable and emotional for families, and yet transition to adulthood is the capstone of all the work we do in special education. It is unfortunate that Individual Education Plan (IEP) transition goals are often not aligned with family plans, leaving teachers unsure of how to best help students and families navigate the world of adult services. While many school districts have checklists of possible post-secondary services for students with severe disabilities, a tool to facilitate these difficult conversations and put plans into action may improve the alignment between what families want for their children and what teachers and other professionals recommend.

Evaluating transition needs and developing meaningful transition goals for students with severe disabilities is frequently a trouble spot in the IEP process. The Individuals with Disabilities Education Improvement Act (IDEIA) requires that IEPs for students with disabilities include goals for transitioning to adult life by no later than age sixteen. According to Indicator 14 of the Utah State Board of Education, only 12.41% of transition IEPs in Utah during the 2010-2011 school year met the compliance requirements for IEPs of students 16 years and older (Utah State Office of Education, 2012). These indicators measure student involvement in the area of education, employment, independent living, and those who are not engaged in any of the above post-

school activities. In addition, post-school outcomes for students with disabilities suggest that transition planning was not successful. For example, during the 2009-2010 year, only 27.56% were enrolled in higher education within one year of exit, 26.69% were competitively employed within one year of exit, 9.79% were involved in some sort of other education, 7.81% were involved in another form of employment, and 28.16% were involved in neither post-secondary education nor employment. Connection with adult agencies continues to occur at a low rate as well. According to the Utah post school survey, only 20% are connected with vocational rehabilitation, 5% are connected with the social security administration, 12% are connected with the department of workforce services, 3% and are connected the division of services for persons with disabilities (Utah Post High School Outcomes Project, 2011).

There are many factors that contribute to the success of transition for students with disabilities. The National Secondary Transition Technical Assistance Center (2012) has identified 16 evidence-based, in-school predictors of post-school success: career awareness, occupational courses, paid employment/work experience, vocational education, work study, community experiences, exit exam requirements/high school diploma status, inclusion in general education, program of study, self-advocacy/self-determination, self-care/independent living, social skills, interagency collaboration, parental involvement, student support, and transition program. Data collected through this center indicated that students with one or more parents who participated in the IEP process were more likely to be engaged in post-school employment. In addition, students who have strong support systems within their families, social networks, and schools are more likely to be employed, be engaged in post-secondary education, and experience a

higher quality of life. Students who were involved in a transition program with measurable goals were more likely to be involved in post-secondary education and employment. Lastly, students who received assistance from three to six community-based agencies were more likely to be engaged in post-school employment or education (National Secondary Transition Technical Assistance Center, 2012).

Families and teachers often perceive the IEP transition planning process differently. Families of students with disabilities “report a perception of ‘not being valued or listened to’ as they participate in the special education and transition planning process and decision making” (Defur et al., 2001, p. 20) whereas educators tend to perceive family involvement as passive (Defur et al., 2001). Defur and colleagues (2001) also found that effective transition planning IEP teams develop collaborative relationships in which information is readily passed between team members. Teachers provide resources and connections for families, and students and families feel valued and can express future goals and aspirations. Families become “case managers” for their student and together families and professionals can produce positive outcomes for students with disabilities who are transitioning into the adult world (Defur et al., 2001.)

A shift needs to occur in the way transition planning occurs. While the IEP plan is often perceived as a one year plan, transition plans should extend much further into the future. “Secondary transition planning and services have been required components of the individual education program (IEP) for more than a decade, yet IEP teams remain bogged down in the mind-set that separates transition from the traditional IEP components. Consequently, transition planning too often becomes an afterthought rather than the primary focus of secondary special education services decisions” (DeFur, 2003, p. 115).

Transition planning should begin from the moment students first enter the special education system and each annual IEP should be a benchmark toward life-long goals.

### *Review of Literature*

There are consistent themes within the literature suggesting that families are frustrated with the transition process. Hetherington and colleagues (2010) examined the real life experiences of students and their parents in the transition process. Families were interviewed about their experiences with the transition planning process. Thirteen students between the ages of 15 and 20 and their families were selected to participate. The students consisted of 10 female and 3 male students. The parent participants consisted of six mothers and three fathers. The students were interviewed during fifteen minute periods and the parents were interviewed during 90 minute focus groups. The information was transcribed, open-coded, and line-by-line coded. The themes that emerged were passive planning, student's demonstrated agency [involvement], feeling like outsiders, experiencing support, advocating, and receiving an appropriate transition curriculum. Of the 13 students, 12 were not aware of having been involved in their transition planning. Parents "frequently felt that they did not have the knowledge to effectively support their children's transition to adult life" (Heatherington et. al., 2010, p. 167). They did not feel adequately prepared to navigate the world of adult agencies. Both parents and students expressed a desire for a full transition program to be included in their student's education. Parents also expressed the feeling that their students were being "pigeon-holed" into certain adult programs and that there was limited engagement on

alternative options for students and families. The researchers determined that family experiences did not line up with best practices in transition (Hetherington et al., 2010).

Defur and colleagues (2001) found results consistent with those of Heatherington and colleagues (2010). Defur and colleagues (2001) examined the experiences of 28 parents who had been involved in the IEP transition planning process. Parents were selected from urban, rural, and suburban communities. The parents were interviewed in four focus groups of 6 to 10 participants. Of the 28 participants, 75% were African American, 18% were Caucasian, 7% were Asian, and 57% were part of a two-parent household. Focus group discussion prompts included topics such as family members' thoughts on (a) their hopes and dreams for their children as young adults, (b) the family's experience in working with schools to assist their children in reaching their transition goals, (c) their experience with school and service providers in helping parents become involved in their son or daughter's education, especially during the transition years, and (d) the critical areas professionals who facilitate transition planning need to be aware of and sensitive to when interacting with families, especially families from diverse backgrounds. After each focus group the facilitator and scribe debriefed the session in order to identify common themes. The data were analyzed using audiotapes, scribe notes, and transcriptions of the tapes. The information gained from these means was systematically analyzed and coded to identify emergent themes.

The results indicated all families had a goal of maximized independence for their student. Parents identified goals of independent living, self-determination, continued education, and employment. The researchers were able to identify two themes to serve as classifiers for the findings: (1) barriers to parental participation and (2) qualities of



professionals who have been able to make a positive difference. The identified barriers to parental participation were teacher and administrator attitudes, diversity concerns, and stigma of special education. Parents identified feelings of not being a valued team member, families being treated differently due to race, and the perception that special education focused on their student's limitations rather than strengths. Educators who made a positive difference practiced communication, collaboration, connection, caring and celebration. Families identified teachers who readily shared information, developed a team approach, connected families with community resources, caringly recognized family pressures, and developed a nature of celebration as educators who were able to create successes for students and families (Defur et al., 2001).

Thompson and colleagues (2000) took a more in-depth look at the files of students to determine how closely transition plans aligned with family goals for the future. Their study included students and their parents from three rural schools. All students were classified as having a Specific Learning Disability. Eight male and 14 female students participated. Data were collected from four sources: (a) assessment and programming information from student cumulative files, (b) the Transition Planning Guide (TPG) on file for each student, (c) interviews with the students, and (d) interviews with the parent(s) of student participants. The TPG contains three sections: (a) General Information (personal identifiers; secondary school experiences; projected date of school exit; consumer, school and non-school participants); (b) Desired Post-school Outcomes (identified outcomes and support intensity needs in the areas of employment , postsecondary education or training, residential, recreation/leisure); (c) Action Plan (24 different types of transition services are listed).

Thompson and colleagues (2000) developed structured parent and student interviews, and were constructed to allow for three response possibilities in each category; (a) no participation, (b) participation without support, and (c) participation with support. Specific descriptions of each support were provided as well. The student and parent interviews were the same other than the phrasing of the questions. The interview procedure and questions were evaluated by experts in the field of special education. All 22 students involved in the study were interviewed and 19 of the parents were interviewed. Of the 19 parents interviewed, 16 were mothers, 2 were fathers, and 1 interview was conducted with both parents present. Frequency and percentage counts were generated on variables concerning anticipated post-school outcomes, support needs, and individuals projected to provide post-school support.

The results indicated that families anticipated competitive employment for their student, postsecondary education, and community connections following exit from the school system. The students were more optimistic in regards to independent living. Parents consistently projected more needed support than the students. In regards to employment, 86% of students and 95% of parents expected competitive employment within a year of exit. Of the parents, 88% anticipated their student needing support in employment, compared with 68% of the students. In the area of postsecondary training 86% of students and 74% of students expected to be enrolled after graduation. Seventy-nine percent of the students and 93% of the parents anticipated that extra support would be needed in the area of postsecondary education, but only one student had taken a college entrance exam, and none of the families had contacted the disability services office at a postsecondary institution. Recreation and leisure were broken into several

categories; over 90% of families reported that students would be involved in shopping, going to movies, concerts, or plays, eating out, and attending community activities. Fewer than 50% of parents reported that students would be involved in physical activities such as sports and working out. Half of the students anticipated living independently compared to about 25% of parents expectation of independent living for their student. Most families anticipated that the students living outside the home would require supports not typical to their same age peers. Both parents and students recognized the necessity of adult service providers with 82% of students and 89% of parents expecting at least one paid service provider. In spite of this, only 9% had any record of post-school provider contact. When the researchers compared the actual occurrences versus the expected occurrences using the tests previously stated there was very little correlation between the TPG and the projected outcomes of families. The agreement between student and parent responses was also evaluated. Again, there was very little correlation between the two (Thompson et al., 2000). The researchers concluded that the transition planning conducted at the school had very little connection with the actual post school projections of students and their families. Transition planning tools used by the IEP teams were ineffective.

Cobb and Alwell (2009) conducted a meta-analysis of 31 studies involving interventions related to transition planning and outcomes. The studies involved 859 youth with a variety of disabilities. They found several primary themes: (1) transition was more of a promise than a reality, (2) transition expertise within IEP teams was inconsistent, (3) levels of parent and student involvement were low, (4) influence of families and extended families on career choices and job acquisition was an important variable, (5) low

expectations regarding post-school outcomes for youth with disabilities, (6) lack of cognitive clarity and systematic instruction in the special education curricula with respect to transition planning, and (7) a lack of understanding of the student's individual needs by teachers (Cobb & Alwell, 2009).

Cobb and Alwell concluded that transition planning was needed more often than actually occurred, and more emphasis needed to be placed on life goals rather than just work goals. Student job placement following graduation was not seen as effective enough, because some students were ill prepared for the social aspects of the workplace and lost their job within months after graduation. The importance of family involvement in the transition process was highlighted in this study, similar to previously mentioned studies. The researchers also found a lack of effectiveness in regards to the transition models used within the school districts. Overall, the researchers suggested the need to implement more individualized planning rather than fitting students into typical post school outcomes (Cobb & Alwell, 2009).

Another important aspect of transition planning is teacher perception. One study looked at the understanding of teachers in regards to self-determination of students with significant disabilities, and these teachers' ability to incorporate self-determination into instruction within their classrooms (Thoma et al., 2008). Fifty teachers who were enrolled in a graduate course on transition planning and secondary education participated in the study. Teaching experience ranged from pre-service teachers to masters level teachers and included teachers of students with significant disabilities at both the elementary and secondary levels. Data were gathered by coding participant's answers to questions about teaching self-determination or self-advocacy to students with significant disabilities on

the midterm examination. The responses were coded based on (a) how the teachers described and discussed self-determination with respect to students with severe disabilities and transition planning; (b) what components of self-determination appeared most salient, (c) how the teachers linked self-determination to transition assessment, transition planning, academic instruction, and/or transition services; and (d) whether they discussed literature-based misconceptions or misinterpretations about self-determination and students with significant disabilities.

The results of this study indicated that most of the teachers mastered a basic understanding of self-determination, that teaching self-determination or self-advocacy skills to students with significant disabilities was a priority to them, and they could identify practices to teach self-determination or self-advocacy skills to their students. The results of this study also revealed a mismatch between what these teachers indicated they would do with respect to teaching self-determination skills and what they had been doing prior to their involvement in the course activities related to self-determination.

Specifically, many teachers stated that they previously focused solely on choice making in the transition planning process, but that choice making was often under very stringent supervision with limited choice options for the student with significant disabilities. The teachers involved in this study also expressed the concern that while they would like to improve the manner in which self-determination is taught to students with significant disabilities, district-wide systems change would need to occur to make these practices understood and accepted by all members of the transition team. Thoma and colleagues (2008) concluded that secondary teachers of students with disabilities as well as other members of secondary transition teams need training in the implementation of effective

practices for teaching self-determination skills, as well as training in prioritizing classroom tasks that require students to use self-determination skills.

### *Problem Statement*

Parents of students with disabilities want them to become more independent but are unsure of the steps to take with adult agencies and providers, or the array of options available to their student (Defur et al., 2001; Hetherington et al., 2010). The students have similar goals for independence but lack the skills to be successful in the adult world (Hetherington et al., 2010.) Transition planning during the student's high school years is ineffective for most families because the school's goals often do not align with post-school family goals (Thompson et al., 2000) and current approaches to transition planning are, for the most part, ineffective (Cobb & Alwell, 2009). Even when teachers are aware of appropriate options and effective instructional practices for preparing students for post-secondary life, parents may not have the same knowledge or the school district template for transition planning may not be consistent with those practices (Thoma et al., 2008).

### *Purpose Statement and Evaluation Questions*

Many of the existing models for transition planning are ineffective in assisting all transition team members—parents, students, and school personnel—in developing a collaborative transition plan that is in the best interest of the student. While the National Secondary Transition Technical Assistance Center has provided schools with evidence-based, in-school predictors of post-school success such as effective interagency

collaboration, meaningful parental involvement, teaching student self-advocacy skills, all of the members of the transition team—especially parents—need a decision-making guide with a variety of post secondary options and steps for preparing students for those options.

The purpose of this project is to develop and evaluate a guide for transition planning that provides parents and teachers with a systematic decision-making guide that is research based and student-centered. The assessment areas come from the National Secondary Transition Technical Assistance Center in-school predictors of post-school success. The specific evaluation questions addressed through this project are:

1. To what extent will the use of this transition planning guide be associated with improvements in parents' and teacher's perceived knowledge of (1) vocational and day training programs, (2) independent living, (3) transportation and community access, (4) financial responsibility, (5) household and personal care, (6) post-secondary education, (7) social relationships, and (8) guardianship options for students with severe or moderate disabilities?
2. To what extent will the use of this planning guide be associated with strong ratings of parents' and teachers' satisfaction with the transition planning process?

## METHOD

### *Participants and Settings*

Six teams of teachers and parents of students with moderate to severe disabilities in high school or post high settings participated in this project. Team 1 consisted of the

life skills teacher and both parents of a 21-year-old post high student who is classified under the Intellectual Disability classification. The teacher was a veteran teacher with 5+ years' experience. Team 2 consisted of the life skills teacher and the mother of an 18-year-old high school student with an intellectual disability. The teacher was a second-year teacher. Team 3 consisted of the life skills teacher and the mother of an 18-year-old high school student with an intellectual disability served in life skills. The teacher has 5+ years of teaching experience in a life skills classroom. Team 4 consisted of the post-high teacher and both parents of a 20-year-old student with autism. The teacher had 5+ years' experience working with adolescents with moderate to severe cognitive impairment. Team 5 consisted of the life skills teacher and the mother of a 17-year-old high school student with autism. The teacher was a fourth-year teacher. Team 6 consisted of the life skills teacher and the mother of a 17-year-old high school student with autism. The teacher was a third-year teacher. Students were present for the transition planning meetings and were involved in the process, although data on knowledge of transition options and satisfaction with the process were not collected on student participants.

To recruit teacher and parent participants, I emailed teachers with an explanation of the requirements for participation in the project. Written informed consent was obtained from teacher, parent, and student participants. All teachers had previously participated in transition meetings without a planning meeting.

### *Dependent Variables and Response Measurement*

The dependent variable for this project was parent and teacher knowledge of appropriate post-school options for students with severe or moderate disabilities. The



dependent variable was measured using a pre-test/post-test with a 5-point Likert-type scale for each item. The pre-test/post-test included questions about knowledge of (1) vocational and day training programs, (2) independent living, (3) transportation and community access, (4) financial responsibility, (5) household and personal care, (6) post-secondary education, (7) social relationships, and (8) guardianship. The pre-test for the teachers was administered prior to the transition planning guide training, and the pretest for the parent was administered prior to the transition planning meeting. The post-test for both the teachers and the parents was administered at the end of the meeting. A satisfaction measure was included in the pre-posttest measure to assess the extent to which parents and teachers were satisfied with the transition process. The pre-test/post-test is included in Appendix A.

### *Evaluation Design*

A pre-experimental pre-test, post-test single case design (Yin, 2009) was used to evaluate the effects of using the transition planning guide on parent and teacher knowledge of post-secondary options for student with severe disabilities as well as their satisfaction with the process.

### *Procedures*

Step 1: Preliminary Development and Expert Review of the Transition Planning Guide. A preliminary form of the planning guide was developed that consisted of surveys of post-secondary options for the students, parents, and teachers, guided discussion to assess the necessary social, behavioral, and skill development outcomes for

preferred options to be successful, and an individual plan summary sheet that included the options that are agreed upon for inclusion in the transition IEP and in the home environment. The questions on the surveys were based on potential post-secondary options and the skills necessary for success for students in regards to 1) vocational and day training programs, 2) independent living, transportation and community access, financial responsibility, 3) household and personal care, post-secondary education, social relationships, and 4) guardianship that come from the National Secondary Transition Technical Assistance Center in-school predictors of post-school success. Options and skills included in the survey were gathered from adult agencies, local providers, and transition guides. The information gained from these surveys was used to focus the options to be considered for the student, and guided discussion questions were included for each category to fully inform team participants about the preferred options and determine the best possible choices for the student. After decisions were made in each category, potential team goals were generated for the student's transition IEP meeting and recorded on a summary sheet.

The planning guide was then reviewed by three experts in the field. These people were John Cardis, Secondary Life Skills coordinator for Cache School District, Melissa Garside, Secondary Resource Coordinator for Cache School District, and Susan Loving, transition specialist for the Utah State Office of Education. John Cardis has worked as a secondary coordinator for Cache school district for 6 years and has an extensive background in transition related topics. Melissa Garside has worked as a secondary coordinator and has developed a new transition plan form for the Cache school district. Susan Loving is the USOE transition specialist and is an expert in the areas of

occupational/physical therapy, traumatic brain injury, and transition. The guide was revised based on their recommendations. For example, John Cardis recommended that the instructions for teachers and parents be clarified, and he assisted me in including wording in the surveys that would be more easily understood by parents and teachers. Melissa Garside recommended adding more survey questions to include skills sets of students with moderate disabilities as well as adding an “n/a” option on some questions, and Susan Loving gave specific recommendations for survey questions that are consistent with USOE transition guidelines. It was also recommended that a list of local resources be added that included contact information and explanations of local resources available to transition students and their families. After the recommendations of the expert reviewers were included in the guide, copies of the planning guide were printed and bound. The revised Transition Planning Guide is included in Appendix B.

Step 2: Preliminary Evaluation of the Transition Planning Tool. Teacher training on the use of the transition planning guide occurred at the teachers’ home school and lasted approximately one hour. Trainings were conducted on an individual basis, and the training agenda is included in Appendix C. The training included a review of each item on the checklist and a brief simulated transition planning meeting. Teachers were checked for comprehension of the post school options included in the guide and also of the process by answering questions on a paper-and-pencil test that is included in Appendix D. Training continued until all teacher participants achieved a score of 90% or higher on the paper and pencil test.

The transition planning meetings also occurred at the student’s home school. The meetings included the student and their parent(s) and teacher. Some meetings included

other professionals who were members of the student's IEP team. The teachers scheduled the meetings with the family and informed me of the date and time of the meetings. The teachers provided the pre-test and social validity measure to parents as well as completed the teacher pre-test and social validity measure. These measures were completed prior to the transition planning meetings.

I was present at all meetings and completed a checklist for fidelity of implementation (Appendix E.) At the end of each meeting, I administered the post-test to the teacher and the parent(s).

## RESULTS

Six teams of teachers and parents of students with moderate to severe disabilities in high school or post high settings participated in this project. The following sections include the results of the comprehension tests from the teacher trainings and fidelity of implementation during the transition meetings, and the pre- and posttest measures of teacher and parent understanding of post school options for individuals with moderate to severe disabilities (Evaluation Question #1). The pre- and posttest measures of teacher and parent satisfaction with transition planning are also presented (Evaluation Question #2).

### *Teacher Training Comprehension*

To determine whether teachers understood the content and procedures that were included in the training, the paper and pencil comprehension test (Appendix D) was

administered at the end of the training session. The goal was to make sure that all teachers were at least 90% accurate in their responses before conducting the transition planning meeting. The results of the comprehension test were as follows: The teachers on teams 1, 3, and 5 received a score of 90%, and the teachers on teams 2, 4, and 6 received a score of 100%.

#### *Fidelity of Implementation During Transition Planning Meetings*

To determine whether teachers conducted the transition planning meetings correctly, a Fidelity of Implementation Checklist (Appendix E) was completed during each transition planning meeting. During the meeting with Team 1, the fidelity measure was 50%. During the meeting for Team 2, the fidelity measure was 96%. For Team 3's and Team 4's meetings, the fidelity measure was 98%. For Team #5, the fidelity measure was 94% and for Team 6 it was 84%.

#### *Evaluation Question #1*

Evaluation question #1 asked: To what extent will the use of this transition planning guide be associated with improvements in parents' and teacher's perceived knowledge of (1) vocational and day training programs, (2) independent living, (3) transportation and community access, (4) financial responsibility, (5) household and personal care, (6) post-secondary education, (7) social relationships, and (8) guardianship options for students with severe or moderate disabilities?

Teachers and parents were asked to complete a questionnaire about their knowledge of post school options for their student, and their satisfaction with transition

planning for their student. The results of the pretest and posttest indicate that all teams showed an increase in knowledge for both parents and teachers (Figure 1). It should be noted that the teacher in Team #1 did not give the parent the pretest as directed, so there is no measure of change for that parent.

### *Evaluation Question #2*

Evaluation question #2 asked: To what extent will the use of this planning guide be associated with strong ratings of parents' and teachers' satisfaction with the transition planning process?

Results indicate that satisfaction increased for both parents and teachers in all but one case (Figure 2.) The teacher who participated in Team 6 indicated the same satisfaction level with and without the use of the guide.

## DISCUSSION

Overall, the use of the transition planning guide that was developed through this project increased teacher and parent knowledge of post school options, and teachers and parents appeared to be more satisfied with the transition planning process when the planning guide was used. There were two exceptions to this trend. The teacher in Team #1, her fidelity of implementation measure was 50% and she did not give the pretest to the parents as directed. During the transition planning meeting, she tended to revert back to procedures and suggestions that she followed previously. The next lowest fidelity measure during the transition meetings was 84% and that was for the teacher in Team 6.

While this teacher followed the transition guide more closely than the teacher in Team #1, she also tended to revert back to things that she had done in prior transition planning meetings. However, in both of these cases the teachers did rate their post-test knowledge higher than their pre-test knowledge. In regards to satisfaction the teacher in Team 6 rated her satisfaction with the process as the same on both the pretest and posttest.

For the rest of the teams, both teachers and parents rated their satisfaction as well as knowledge higher after the use of the transition planning guide. The teachers in Teams 4 and 5 used the guide to facilitate discussion but also used their professional experience to inform and educate the families. In cases 2 and 3 the teachers chose to use the guide more stringently and follow the discussion prompts with precision. In all four cases there was an increase of both knowledge and satisfaction. The differences in the degree to which teachers followed the guide exactly did not appear to be associated with experience, but the guide would probably be most useful for newer or inexperienced teachers as they are learning more about transition. This guide may also be useful for experienced teachers who need to facilitate difficult conversations with families of transition age students. Another point to note is that the guide may be useful to encourage family follow through. One parent said she was motivated to follow through with what had been discussed in the meeting because it had been written down and she knew it would be talked about again the next year.

If this guide were to be used in the future, it should be updated on a regular basis with new resources as they become available or change within the community. It would also be helpful to create a training video for teachers that included several examples of meetings with families and how best to use the guide to facilitate difficult conversations.

More explicit directions for how to use the guide and facilitate discussions may also help to improve the fidelity of implementation. The guide could also be translated into Spanish and checked for cultural sensitivity to include more families. In addition to collecting data on teacher and parent knowledge and satisfaction, it would also be valuable to design measures for student knowledge and satisfaction.

## CONCLUSION

For all of the teachers and parents who participated in transition planning meetings using the guide that was developed through this project, knowledge about post school options improved and in all but one case satisfaction with the transition planning process improved. Given these results, I would conclude that future users of this guide will be better prepared for the actual transition IEP meeting and more satisfied with the process. If school districts require teachers to provide parents with a systematic process for making decisions about adult services and activities, individuals with moderate to severe disabilities will be better prepared for adult living.



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## **Appendices**

Name \_\_\_\_\_

School \_\_\_\_\_

Position \_\_\_\_\_

Directions: Please mark for each of the following areas your level of understanding without the use of this planning guide and with the use of this planning guide. Use the following as a guide.

5 = I feel as though I have an excellent understanding

4 = I feel as though I have a good understanding

3 = I somewhat understand but still have a few questions

2 = I understand a little but still have a lot of questions

1 = I have no understanding of the topic

#### Pre-Test/Post-Test Evaluation

##### 1) Vocation and Day Program

What is your knowledge level of the following vocation and day program options for your student?	High 5	Above Average 4	Some 3	Very Little 2	None 1
Full Time Work					
Part Time Work					
Volunteer Work					
Supported Employment					
Workshop Setting					
Day Program					
Respite Care					

## 2) Independent Living

What is your knowledge level of the following independent living options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
Living Independently					
Supported Apartment					
Professional Parent					
Respite Care					
Living with Family/Guardian/Caretaker					

## 3) Transportation and Community Access

What is your knowledge level of the following transportation and community access options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
Driver's License					
Public Transportation					
Call-a-Ride					
Respite/Provider Transport					
Family/Guardian/Caretaker					

Transport					
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## 4) Financial Responsibility

What is your knowledge level of the following financial responsibility options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
Financial Independence					
Partial Responsibility Spending					
Leisure Spending					
Family Managed Finances					

## 5) Household and Personal Care

What is your knowledge level of the following household and personal care options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
Independent Care					
Partial Responsibility Care					
Respite Care					
Family Managed Care					

## 6) Social Relationships

What is your knowledge level of the following social relationship options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
Community/Group Relationships					
Intimate Relationships					
Friendships					
Family Relationships					

## 7) Post-Secondary Education and Training

What is your knowledge level of the following post-secondary education options for your student?	High	Above Average	Some	Very Little	None
	5	4	3	2	1
University					
Community College					
Trade School					
Short Term Job Coaching					
Long Term Job Coaching					

## 8) Guardianship

What is your knowledge level of the following guardianship options for your student?	High 5	Above Average 4	Some 3	Very Little 2	None 1
Independent Person					
Conservatorship					
Limited Guardianship					
Guardianship					

What is your level of the satisfaction with the transition planning process with and without the use of this planning guide?	High 5	Above Average 4	Some 3	Very Little 2	None 1
Without Planning Guide					
With Planning Guide					



# Transition Planning Guide

Whole Person/Whole Team  
Approach to Transition  
Planning for Students with  
Moderate to Severe  
Disabilities

Developed by Shalee Thompson

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Driver's License	Public Transportation	Call-a-Ride	Respite Care/Provider Transport	Family Transport		
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<b>Guardianship</b>						
Independent Person	Conservatorship	Limited Guardianship	Guardianship			

## Student Survey

Directions: Please circle all answers that apply for each question.

Note for Teachers: Accommodations may be applied for students who require them.

### 1. Vocation and Day Program

I work right now:

- Yes, please list where.

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- No

I want to work:

- Yes, please list where.

---



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- No

I have had a job before:

- Yes, please list where.

---



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- No

I know how to:

- Apply for a job  
 Tell time  
 Finish my work  
 Deal with mistakes  
 Deal with anger  
 Use a phone  
 Follow directions  
 Get along with others  
 None of the above

I want to know how to:

- Apply for a job  
 Tell time  
 Finish my work  
 Deal with mistakes  
 Deal with anger  
 Use a phone  
 Follow directions  
 Get along with others  
 None of the above

## 2. Independent Living

Right now I live:

- At an apartment or house without help
- At an apartment or house with help
- At home with my  
family/guardian/caretaker

When I am older I would I like to live:

- At an apartment or house without help
- At an apartment or house with help
- At home with my  
family/guardian/caretaker

I know how to:

- Make food
- Do laundry
- Clean
- Work outside
- Use the kitchen
- Other

---



---

- None of the above

I want to know how to:

- Make food
- Do laundry
- Clean
- Work outside
- Use the kitchen
- Other

---



---

- None of the above

### 3. Transportation and Community Access

I travel by:

- Driving a car
- Riding the public bus
- Riding a bike
- Walking
- Riding with my family/guardian/caretaker

I would like to travel by:

- Driving a car
- Riding the public bus
- Riding a bike
- Walking
- Riding with my family/guardian/caretaker

I can go by myself to these places:

- Restaurants
- Grocery store
- Library
- Gym
- Movies
- Bowling alley
- Mall
- Parks
- Stores
- Mini golf
- Sports
- Camping
- Music events
- Church

Other

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---

None of the above

I want to go to these places by myself:

- Restaurants
- Grocery store
- Library
- Gym
- Movies
- Bowling alley
- Mall
- Parks
- Stores
- Mini golf
- Sports
- Camping
- Music events
- Church
- Other

---



---

None of the above

#### 4. Financial Responsibility

I use money right now:

- By myself
- With help
- I don't use money

I want to use money:

- By myself
- With help
- I don't want to use money

I can use this kind of money:

- Cash
- Check
- Credit card
- Debit card
- None of the above

I would like to use this kind of money:

- Cash
- Check
- Credit card
- Debit card
- None of the above

I know how to:

- Count coins
- Count bills
- Write a check
- Use a card
- Budget
- Pay for things
- Use a bank
- None of the above

I want to know how to:

- Count coins
- Count bills
- Write a check
- Use a card
- Budget
- Pay for things
- Use a bank
- None of the above

## 5. Household and Personal Care

I know how to:

- Shower or bath
- Wash hair
- Brush teeth
- Floss
- Comb hair
- Clip fingernails
- Wash face
- Use deodorant
- Use body spray
- Shave
- Dress myself
- Care for feminine needs (women only)
- None of the above

I want to know how to:

- Shower or bath
- Wash hair
- Brush teeth
- Floss
- Comb hair
- Clip fingernails
- Wash face
- Use deodorant
- Use body spray
- Shave
- Dress myself
- Care for feminine needs (women only)
- None of the above

I know how to:

- Tell if I am sick
- Give myself medicine
- Help myself if I am hurt
- Tell someone who can help that I am sick
- How to call the doctor
- None of the above

I want to know how to:

- Tell if I am sick
- Give myself medicine
- Help myself if I am hurt
- Tell someone who can help that I am sick
- How to call the doctor
- None of the above

I know how to:

- Shop on my own
- Store food correctly
- Store household items correctly
- Use the phone
- Ask for help
- None of the above

I want to know how to:

- Shop on my own
- Store food correctly
- Use the phone
- Ask for help
- None of the above



## 6. Social Relationships

I do these things:

- Go to a group activity or club
- Have friends outside of school
- Have a boyfriend/girlfriend
- Do things with my  
family/guardian/caretaker
- Other

---



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I want to do these things:

- Go to a group or club
- Have friends outside of school
- Have a boyfriend/girlfriend
- Do things with my  
family/guardian/caretaker
- Other

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I know how to:

- Know about activities in my community
- Have a conversation
- Make new friends
- Handle my anger
- Be safe in relationships
- Use a phone
- Speak nicely
- None of the above

I want to know how to:

- Know about activities in my community
- Have a conversation
- Make new friends
- Handle my anger
- Be safe in relationships
- Use a phone
- Speak nicely
- None of the above

## 7. Post-Secondary Education

I am getting training right now:

- At a college
- At a trade school
- With a job coach for a short time
- With a job coach for a long time
- None of the above

I want to get training:

- At a college
- At a trade school
- With a job coach for a short time
- With a job coach for a long time
- None of the above

I have these skills:

- Studying
- Note taking
- Test taking
- Use a computer
- Keep myself on track
- Follow directions
- Ask for help
- Deal with mistakes
- None of the above

I want to have these skills:

- Studying
- Note taking
- Test taking
- Use a computer
- Keep myself on track
- Follow directions
- Ask for help
- Deal with mistakes
- None of the above

## 8. Guardianship

I make these important decisions:

- All decisions
- Decisions about my money
- Decisions about my health
- Decisions about my house
- Decisions about my school or training
- None of the above

I want to make these important decisions:

- All decisions
- Decisions about my money
- Decisions about my health
- Decisions about my house
- Decisions about my school or training
- None of the above

## Parent/Guardian/Caretaker Survey

Directions: Please circle one or more answers for each question. Remember this is a current reflection of your student's skill set. The answers to this survey may change from year to year depending on individual student and family circumstances and preferences. The purpose of this survey is to help you and your family discuss and start to determine possible outcomes for your student's future.

### 1. Vocation and Day Program

<p>Does your student currently work?</p> <p><input type="checkbox"/> Full-time</p> <p><input type="checkbox"/> Part-time</p> <p><input type="checkbox"/> Volunteer work</p> <p><input type="checkbox"/> In the home</p> <p><input type="checkbox"/> Previous jobs, please list.</p> <p>_____</p> <p>_____</p> <p><input type="checkbox"/> Other</p> <p>_____</p> <p>_____</p> <p><input type="checkbox"/> Does not work</p>	<p>How much total time has your student spent at a job?</p> <p><input type="checkbox"/> A job sample</p> <p><input type="checkbox"/> A job shadow</p> <p><input type="checkbox"/> A week</p> <p><input type="checkbox"/> A month</p> <p><input type="checkbox"/> 1-6 months</p> <p><input type="checkbox"/> 6 or more months</p> <p><input type="checkbox"/> N/A</p>
<p>Is it a goal for your student to work?</p> <p><input type="checkbox"/> Full-time</p> <p><input type="checkbox"/> Part-time</p> <p><input type="checkbox"/> Volunteer work</p> <p><input type="checkbox"/> Supported employment</p> <p><input type="checkbox"/> Other</p> <p>_____</p> <p>_____</p> <p><input type="checkbox"/> Not a goal to work</p>	<p>What length of time per day has your student spent at a job?</p> <p><input type="checkbox"/> 30 minutes or less</p> <p><input type="checkbox"/> 30 to 60 minutes</p> <p><input type="checkbox"/> 1 to 2 hours</p> <p><input type="checkbox"/> 2 or more hours</p> <p><input type="checkbox"/> N/A</p>

Which of the following skills does your student currently have to work in an employment situation? (Can perform the tasks on level with same age peers.)

- Can apply and interview for jobs
- Follow directions
- Problem solve
- Complete tasks independently
- Phone skills
- Ask for help when needed
- Deal with mistakes
- Flexible
- Receive feedback appropriately
- Good hygiene
- Work independently
- Get along with co-workers
- Time management
- Ask for time off appropriately
- None of the above

Does your student need paid employment in order to sustain living expenses?

- Yes
- No

Is your student able to perform the tasks necessary for a job independently?

- Yes
- No
- Some, please list.

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Do you have connections with employers who would be willing to work with your student?

- Yes, please list employers.

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- No

What types of jobs do you see your student accessing successfully?

- Please list.

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- N/A

What types of jobs have you discussed with your student?

- Please list.

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- Have not discussed

What types of jobs has your student expressed interest in?

- Please list.

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- Has not expressed an interest

Have you or your student visited any workshop settings?

- Yes, please list workshop settings.

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- No

Have you or your student visited any day programs?

- Yes, please list programs.

---

---

- No

Is your student currently set up to receive respite care?

- Yes, please list respite care providers.

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- No

## 2. Independent Living

Where does your student currently live?

- On their own
- Supported apartment
- Professional parent
- At home with respite care assistance
- With family/guardian/caregiver
- Other

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Where do you see your student living in the future?

- On their own
- Supported apartment
- Professional parent
- At home with respite care assistance
- With family/guardian/caregiver
- Other

---



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Which of the following independent living skills does your student have?

- Phone skills
- Stranger identification
- Tell time
- Use alarm clock
- Identify emergencies
- Other

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- None of the above

Which household chores is your student able to complete independently?

- Food Prep
  - Shop for food
  - Choose nutritious meals
  - Prepare non-cooked foods
  - Microwave
  - Stove top
  - Oven
- Laundry
  - Sorting
  - Washing
  - Drying
  - Folding
  - Putting away
- Cleaning
  - Make bed
  - Vacuum
  - Dust
  - Sweep
  - Mop
  - Clean shower/tub
  - Clean toilet
  - Clean mirrors/windows
  - Clean counters/tables
- Outdoor Work
  - Pull weeds
  - Mow grass
  - Shovel snow
  - Rake leaves

- Kitchen
    - Wash dishes in sink
    - Use dishwasher
    - Put dishes away
    - Clean counters
    - Wipe oven
    - Wipe microwave
  - Other
- 
- 
- None of the above



### 3. Transportation and Community Access

How does your student currently receive transportation or access their community?

- They have a driver's license
- Public transportation
- Ride a bike
- Walk
- Call-a-ride (public transit for people with disabilities)
- Respite care/providers transport
- Family/guardian/caretaker transport
- Other

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In the future how do you see your student to receiving transportation or accessing their community?

- Receive a driver's license
- Public transportation
- Ride a bike
- Walk
- Call-a-ride (public transit for people with disabilities)
- Respite care/providers transport
- Family/guardian/caretaker transport
- Other

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Which of the following skills does your student currently have in order to receive a driver's license?

- Read road signage
- Obey rules of the road
- Pass required tests
- Deal with emergencies
- Understand insurance
- Car maintenance
- Other

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---

N/A

Which of the following skills does your student currently have in order to safely and independently use public transportation?

- Tell time
- Follow a schedule
- Cross streets and parking lots
- Read a map
- Identify strangers
- Ask for help when needed
- Deal with unexpected changes
- Deal with emergencies
- Yield to traffic
- Read signage
- Other

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---

N/A

Which of the following skills does your student currently have in order to safely and independently ride a bike?

- Yield to traffic
- Read signage
- Cross streets and parking lots
- Identify strangers
- Ask for help when needed
- Deal with emergencies
- Other

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- N/A

Which of the following skills does your student currently have in order to safely and independently navigate the community on foot?

- Yield to traffic
- Read signage
- Cross streets and parking lots
- Identify strangers
- Ask for help when needed
- Deal with emergencies
- Other

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- N/A

Is your student currently set up to receive call-a-ride services?

- Yes
- No

Is your student currently set up to receive transportation from respite or other providers?

- Yes, please list provider.

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- No

Which of the following locations does your student currently access independently?

- Restaurants
- Grocery stores
- Library
- Gym
- Movie theater
- Bowling alley
- Mall
- Parks
- Department stores
- Miniature golf
- Camping
- Music performances
- Sporting events
- Other

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- None of the above

#### 4. Financial Responsibility

What is your student's current independence level with money and finances?

- Handles finances independently
- Handles finances with assistance
- Uses money for leisure spending
- Has no access to money
- Other

---



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In the future, what is your goal for your student's finances?

- Handle finances independently
- Handle finances with assistance
- Use money for leisure spending
- Have no access to money
- Other

---



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What forms of money does your student currently use?

- Cash
- Check
- Debit card
- Credit card
- Gift card
- Other

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- None of the above

Which of the following money skills does your student currently have?

- Count bills
- Count change
- Use a card
- Write a check
- Pay bills
- Choose best price
- Determine needs and wants
- Make purchases
- Budget
- Use a bank
- Other

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- None of the above

Does your student currently have Social Security Income (SSI) funding?

- Yes
- Started the process
- No

Does your student currently have Division of Services for People with Disabilities (DSPD) funding?

- Yes
- Started the process
- No

## 5. Household and Personal Care

How does your student currently complete personal care tasks?

- Independently
- Some independently, please list.

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- With assistance from respite care
- With assistance from family/guardian/caretaker

Is it a goal for your student to complete personal care?

- Independently
- Some independently, please list.

---



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- With assistance from respite care
- With assistance from family/guardian/caretaker

Which of the following personal care tasks is your student currently able to complete independently?

- Showering/bathing
- Brushing teeth
- Flossing teeth
- Combing hair
- Clipping/filing fingernails
- Washing face
- Using deodorant
- Using body spray
- Shaving

- Dressing
- Feminine care (women only)
- Feeding
- Other

---



---

- None of the above

Which of the following personal health needs can your student complete independently?

- Identify when they are sick
- Administer medication to self
- Treat minor injuries
- Know how/when to call medical professionals
- Exercise
- Other

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- None of the above

Which of the following household care tasks can your student currently complete independently?

- Shop for clothing
- Shop for household goods
- Properly store food
- Properly store household goods
- Ask for help when needed
- Phone skills
- Other

---



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- None of the above

## 6. Social Relationships

Which of the following types of relationships does your student currently have?

- Attend extracurricular activities (groups, clubs, etc.)
- Have friends outside of school
- Have intimate relationships (boyfriend, girlfriend)
- Have close family/guardian/caretaker relationships
- Other

---



---

Which of the following types of relationships do you see your student having in the future?

- Attend extracurricular activities (groups, clubs, etc.)
- Have friends outside of school
- Have intimate relationships (boyfriend, girlfriend)
- Have close family/guardian/caretaker relationships
- Other

---



---

Which of the following skills does your student currently have in order to access extracurricular activities?

- Awareness of opportunities
- Conversation skills
- Reading body language
- Speaking kindly
- Dealing with mistakes/anger
- Being flexible
- Good hygiene
- Other

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- None of the above

Which of the following skills does your student currently have in order to have friends outside school?

- Ways of meeting friends
- Conversation skills
- Reading body language
- Speaking kindly
- Dealing with anger
- Being flexible
- Dealing with teasing/joking
- Good hygiene
- Phone skills
- Other

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- None of the above

Which of the following skills does your student currently have in order to have a safe intimate relationship?

- Safe dating habits
- Understanding of people who will take advantage
- Sexual education
- Reading body language
- Speaking kindly
- Dealing with anger
- Being flexible
- Good hygiene
- Phone skills
- Understanding of healthy relationships
- Other

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---

- None of the above

Which of the following skills does your student currently have in order to have close family/guardian/caretaker connections?

- Speaking kindly
- Dealing with mistakes/anger
- Being flexible
- Communication skills
- Other

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- None of the above

## 7. Post-Secondary Education and Training

Which of the following does your student currently attend/receive?

- Attend university
- Attend community college
- Attend technology/trade school
- Receive short-term job coaching
- Receive long-term job coaching
- Other

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In the future what would you like to see your student access?

- University training
- Community college training
- Technology/trade school training
- Short-term job coaching
- Long-term job coaching
- Other

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Which of the following skills does your student currently have in order to attend a higher education setting?

- Study skills
- Self-management skills
- Note taking skills
- Test taking skills
- Computer skills
- Time management
- Follow a schedule
- Ask for help when needed
- Complete tasks
- Follow directions

- Receive feedback appropriately
- Dealing with mistakes
- Other

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---

- None of the above
- N/A

Is your student currently set up to receive short-term job coaching?

- Yes, please list agency.

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- No

Is your student currently set up to receive long-term job coaching?

- Yes, please list agency.

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---

- No

Is your student currently set up to receive other services?

- Yes, please list.

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---

- No

## 8. Guardianship

What important decisions is your student currently making independently?

- All important decisions
- Decisions about finances
- Decisions about medical treatment
- Decisions about where to live
- Decisions about where to go to school/receive training
- Currently does not make these types of decisions independently

In the future what important decisions would you like your student to make?

- All important decisions
- Decisions about finances
- Decisions about medical treatment
- Decisions about where to live
- Decisions about where to go to school/receive training
- They will not be making these types of decisions

Do you currently have any form of guardianship for your student?

- No form of guardianship
- Conservatorship
- Limited guardianship
- Guardianship



### Parent/Guardian/Caregiver Summary Sheet

Directions: Summarize your thoughts as a family and bring this sheet along with the survey to your meeting. Discussion and planning will continue in the meeting. This sheet will help to guide the team in making decisions. A copy of the survey and summary sheet will be placed in your student's file for future reference.

In the following areas what is the preferred outcome(s) for this student?

1. Vocation and Day Program

- Full-time work
- Part-time work
- Volunteer work
- Supported employment
- Workshop setting
- Day program
- Respite care

What supports/training will be needed to access the preferred outcome(s)?

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2. Independent Living

- Living independently
- Supported apartment
- Professional parent
- Respite care
- Living with family/guardian/caregiver

What supports/training will be needed to access the preferred outcome(s)?

---



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3. Transportation and Community Access

- Driver's license
- Public transportation
- Call-a-ride
- Respite care/provider transport
- Family/guardian/caregiver transport

What supports/training will be needed to access the preferred outcome(s)?

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4. Financial Responsibility

- Financially independent
- Partial responsibility spending
- Leisure spending
- Family/guardian/caretaker managed

What supports/training will be needed to access the preferred outcome(s)?

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5. Household and Personal Care

- Independent care
- Partial responsibility
- Respite care
- Family/guardian/caretaker managed

What supports/training will be needed to access the preferred outcome(s)?

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6. Social Relationships

- Community/group relationships
- Intimate relationships
- Friendships
- Family/guardian/caretaker relationships

What supports/training will be needed to access the preferred outcome(s)?

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7. Post-Secondary Education and Training

- University
- Community college
- Trade school
- Short-term job coaching
- Long-term job coaching

What supports/training will be needed to access the preferred outcome(s)?

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8. Guardianship

- Independent person
- Conservatorship
- Limited guardianship
- Guardianship

What supports/training will be needed to access the preferred outcome(s)?

---

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## Teacher Survey

Directions: Please circle one or more answers for each question. Remember this is a current reflection of the student's skill set. The answers to this survey may change from year to year depending on individual student and family circumstances and preferences.

### 1. Vocation and Day Program

Does this student currently have a job placement during the school day?

- Yes, please list.

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- No  
 Previous jobs, please list.

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How much total time has this student spent at a job?

- A job sample  
 A job shadow  
 A week  
 A month  
 1-6 months  
 6 or more months  
 N/A

What length of time per day has this student spent at a job?

- 30 minutes or less  
 30 to 60 minutes  
 1 to 2 hours  
 2 or more hours  
 N/A

Which of the following skills does your student currently have to work in an employment situation? (Can perform the tasks on level with same age peers.)

- Can apply and interview for jobs  
 Follow directions  
 Problem solve  
 Complete tasks independently  
 Phone skills  
 Ask for help when needed  
 Deal with mistakes  
 Flexibility  
 Receive feedback appropriately  
 Good hygiene  
 Work independently  
 Get along with co-workers  
 Time management  
 Ask for time off appropriately  
 None of the above

What types of jobs do you see this student successfully accessing?

- Please list.

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- N/A

What types of jobs has this student expressed interest in?

- Please list.

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- Has not expressed interest.

Has this student tried any prevocational tasks at the school?

- Yes, please list tasks.

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- No

What types of prevocational tasks has this student been successful with?

- Please list.

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- N/A

How much support does this student require when completing tasks at school?

- One on one supervision  
 Small group supervision  
 Large group supervision  
 Can complete most tasks independently

## 2. Independent Living

Which of the following independent living skills does this student have?

- |  |   |
|--|---|
| <input type="checkbox"/> Phone skills<br><input type="checkbox"/> Stranger identification<br><input type="checkbox"/> Tell time<br><input type="checkbox"/> Use alarm clock<br><input type="checkbox"/> Identify emergencies<br><input type="checkbox"/> Other<br><hr/> <hr/> <input type="checkbox"/> None of the above | <input type="checkbox"/> Outdoor Work<br><input type="radio"/> Pull weeds<br><input type="radio"/> Mow grass<br><input type="radio"/> Shovel snow<br><input type="radio"/> Rake leaves<br><input type="checkbox"/> Kitchen<br><input type="radio"/> Wash dishes in sink<br><input type="radio"/> Use dishwasher<br><input type="radio"/> Put dishes away<br><input type="radio"/> Clean counters<br><input type="radio"/> Wipe oven<br><input type="radio"/> Wipe microwave<br><input type="checkbox"/> Other<br><hr/> <hr/> <input type="checkbox"/> None of the above |
|--|---|

Which daily living activities is this student currently able to complete at school?

- |  |  |
|--|--|
| <input type="checkbox"/> Food Prep<br><input type="radio"/> Shop for food<br><input type="radio"/> Choose nutritious meals<br><input type="radio"/> Prepare non-cooked foods<br><input type="radio"/> Microwave<br><input type="radio"/> Stove top<br><input type="radio"/> Oven<br><input type="checkbox"/> Laundry<br><input type="radio"/> Sorting<br><input type="radio"/> Washing<br><input type="radio"/> Drying<br><input type="radio"/> Folding<br><input type="radio"/> Putting away<br><input type="checkbox"/> Cleaning<br><input type="radio"/> Make bed<br><input type="radio"/> Vacuum<br><input type="radio"/> Dust<br><input type="radio"/> Sweep<br><input type="radio"/> Mop<br><input type="radio"/> Clean shower/tub<br><input type="radio"/> Clean toilet<br><input type="radio"/> Clean mirrors/windows<br><input type="radio"/> Clean counters/tables | <input type="checkbox"/> None of the above |
|--|--|

### 3. Transportation and Community Access

How does this student currently access their school and community?

- Driver's license
- Rides with family/guardian/caretaker
- Rides with friends
- Public transportation
- Walks
- Rides a bike
- Rides school bus

Which of the following skills does this student currently have in order to receive a driver's license?

- Read road signage
- Obey rules of the road
- Pass required tests
- Deal with emergencies
- Understand insurance
- Car maintenance
- Other

\_\_\_\_\_

\_\_\_\_\_

- N/A

Which of the following skills does this student currently have in order to safely and independently use public transportation?

- Tell time
- Follow a schedule
- Cross streets and parking lots
- Read a map
- Identify strangers
- Ask for help when needed
- Deal with unexpected changes

- Deal with emergencies
- Yield to traffic
- Read signage
- Other

\_\_\_\_\_

\_\_\_\_\_

- N/A

Which of the following skills does this student currently have in order to safely and independently ride a bike?

- Yield to traffic
- Read signage
- Cross streets and parking lots
- Identify strangers
- Ask for help when needed
- Deal with emergencies
- Other

\_\_\_\_\_

\_\_\_\_\_

- N/A

Which of the following skills does this student currently have in order to safely and independently navigate the community on foot?

- Yield to traffic
- Read signage
- Cross streets and parking lots
- Identify strangers
- Ask for help when needed
- Deal with emergencies
- Other

\_\_\_\_\_

\_\_\_\_\_

- N/A

Is this student able to access the school bus independently and safely?

- Yes
- No

Is this student able to navigate the school independently and safely?

- Yes
- No

Which school locations is this student currently able to access independently?

- Classes
- Lunch
- Office
- Extra-curricular activities
- Assemblies
- Class activities
- Other

---

- None of the above



#### 4. Financial Responsibility

Which of the following money skills does this student currently have?

- Count bills
- Count change
- Use a card
- Write a check
- Pay bills
- Choose best price
- Determine needs and wants
- Make purchases
- Budget
- Use a bank
- Other

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- None of the above

Currently what type of money could this student access successfully?

- Cash
- Check
- Debit card
- Credit card
- Gift card
- Other

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- None of the above

## 5. Household and Personal Care

Which personal care tasks is this student currently able to complete independently?

- Brushing teeth
- Flossing teeth
- Combing hair
- Clipping/filing fingernails
- Washing face
- Using deodorant
- Using body spray
- Shaving
- Dressing
- Feminine care (women only)
- Feeding
- Other

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- None of the above

Which health care tasks is this student currently able to complete independently?

- Identify when they are sick
- Administer medication to self
- Treat minor injuries
- Know how/when to call medical professionals
- Other

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- None of the above

Which of the following household care tasks can this student currently complete independently?

- Shop for clothing
- Shop for household goods
- Properly store food
- Properly store household goods
- Ask for help when needed
- Phone skills
- Other

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- None of the above

## 6. Social Relationships

Which of the following does this student currently access?

- Attend extracurricular activities (groups, clubs, etc.)
- Have friends outside of school
- Have intimate relationships (boyfriend, girlfriend)
- Have close family/guardian/caretaker relationships
- Other

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Which of the following skills does this student currently have in order to access extracurricular activities?

- Awareness of opportunities
- Conversation skills
- Reading body language
- Speaking kindly
- Dealing with mistakes/anger
- Being flexible
- Good hygiene
- Other

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- None of the above

Which of the following skills does this student currently have in order to have friends outside school?

- Way of meeting friends
- Conversation skills
- Reading body language
- Speaking kindly
- Dealing with anger
- Being flexible
- Dealing with teasing/joking
- Good hygiene
- Phone skills
- Other

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- None of the above

Which of the following skills does this student currently have in order to have a safe intimate relationship?

- Safe dating habits
- Understanding of people who take advantage
- Sexual education
- Reading body language
- Speaking kindly
- Dealing with anger
- Being flexible
- Good hygiene
- Phone skills
- Understanding of healthy relationships

Other

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None of the above

Which of the following skills does this student currently have in order to have close family/guardian/caretaker connections?

Speaking kindly

Dealing with mistakes/anger

Being flexible

Communication skills

Other

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None of the above

### 7. Post-Secondary Education and Training

Which of the following is this student currently on track to complete?

- Graduate with plans of college
  - Graduate with plans of community college
  - Graduate with plans of technology/trade school
  - Receive a diploma
  - Receive a GED
  - Receive a certificate of completion
  - Move to a post high program
  - Leave special education services due to age
  - Other
- 
- 

Which of the following skills does this student currently have in order to attend a higher education setting?

- Study skills
  - Self-management skills
  - Note taking skills
  - Test taking skills
  - Computer skills
  - Time management
  - Follow a schedule
  - Ask for help when needed
  - Complete tasks
  - Follow directions
  - Receive feedback appropriately
  - Dealing with mistakes
  - Other
- 
- 

- None of the above
- N/A

## **8. Guardianship**

Guardianship is a family decision. As a teacher provide information and contacts for the family.

### Teacher Summary Sheet

Directions: Summarize your recommendations and bring this sheet along with the summary to the meeting. Discussion and planning will continue in the meeting. This sheet will help to guide the team in making decisions. The survey and summary sheet will be placed in the student's file for future reference.

In the following areas what is the preferred outcome(s) for this student?

#### 1. Vocation and Day Program

- Full-time work
- Part-time work
- Volunteer work
- Supported employment
- Workshop setting
- Day program
- Respite care

What supports/training will be needed to access the preferred outcome(s)?

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#### 2. Independent Living

- Living independently
- Supported apartment
- Professional parent
- Respite care
- Living with family/guardian/caretaker

What supports/training will be needed to access the preferred outcome(s)?

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#### 3. Transportation and Community Access

- Driver's license
- Public transportation
- Call-a-ride
- Respite care/provider transport
- Family/guardian/caretaker transport

What supports/training will be needed to access the preferred outcome(s)?

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#### 4. Financial Responsibility

- Financially independent
- Partial responsibility spending
- Leisure spending
- Family/guardian/caretaker managed

What supports/training will be needed to access the preferred outcome(s)?

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#### 5. Household and Personal Care

- Independent care
- Partial responsibility
- Respite care
- Family/guardian/caretaker managed

What supports/training will be needed to access the preferred outcome(s)?

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#### 6. Social Relationships

- Community/group relationships
- Intimate relationships
- Friendships
- Family/guardian/caretaker relationships

What supports/training will be needed to access the preferred outcome(s)?

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#### 7. Post-Secondary Education

- University
- Community college
- Technology/trade school
- Short-term job coaching
- Long-term job coaching



What supports/training will be needed to access the preferred outcome(s)?

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8. Guardianship

Guardianship is a family decision. As a teacher provide information and contacts for the family.

### **Team Discussion and Planning Guide**

Directions: Using the results from the surveys discuss as a team and make an individual plan. Discussion should include all members of the team. More than one option can be chosen. Use the individual plan sheet to develop goals and priorities as the team discusses possible outcomes.

#### **1. Vocation and Day Program**

At this point in time what is the preferred outcome for this student?

- Full-time work
- Part-time work
- Volunteer work
- Supported employment
- Workshop setting
- Day program
- Respite care

What supports will be needed for the student to successfully access this setting?

- Vocational support
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for vocational training and day program.

- Full-time work: page 9
- Part-time work: page 9
- Volunteer work: page 9
- Supported employment: page 9
- Workshop setting: page 10
- Day program: page 11
- Respite care: page 11

## 2. Independent Living

At this point in time what is the preferred outcome for this student?

- Living independently
- Supported apartment
- Professional parent
- Respite care
- Living with family/guardian/caretaker

What supports will be needed for the student to successfully access this setting?

- Independent living skills training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for independent living.

- Living independently: page 12
- Supported apartment: page 12
- Professional parent: page 12
- Respite care: page 13
- Living with family/guardian/caretaker: page 14

### 3. Transportation and Community Access

At this point in time what is the preferred outcome for this student?

- Driver's license
- Public transportation
- Call-a-ride
- Respite care/provider transport
- Family/guardian/caretaker transport

What supports will be needed for the student to successfully access this setting?

- Driver's training
- Public transit training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for transportation and community access needs.

- Driver's license: page 15
- Public transportation: page 16
- Call-a-ride: page 17
- Respite care/provider transport: page 18
- Family/guardian/caretaker transport: page 19

#### 4. Financial Responsibility

At this point in time what is the preferred outcome for this student?

- Financially independent
- Partial responsibility spending
- Leisure spending
- Family/guardian/caretaker managed

What supports will be needed for the student to successfully access this setting?

- Basic money training
- Money management training
- Budgeting training
- Banking training
- Financial literacy training

After discussing possible outcomes follow the guide below to begin planning for financial responsibility.

- Financially independent: page 20
- Partial responsibility spending: page 20
- Leisure spending: page 20
- Family/guardian/caretaker managed: page 20

## 5. Household and Personal Care

At this point in time what is the preferred outcome for this student?

- Independent care
- Partial responsibility
- Respite care
- Family/guardian/caretaker managed

What supports will be needed for the student to successfully access this setting?

- Independent living skills training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for household and personal care.

- Independent care: page 21
- Partial responsibility: page 22
- Respite care: page 22
- Family/guardian/caretaker managed: page 22

## 6. Social Relationships

At this point in time what is the preferred outcome for this student?

- Community/group relationships
- Intimate relationships
- Friendships
- Family/guardian/caretaker relationships

What supports will be needed for the student to successfully access this setting?

- Safe relationship training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for social relationships.

- Community/group relationships: page 23
- Intimate relationships: page 24
- Friendships: page 25
- Family/guardian/caretaker relationships: page 26

## 7. Post-Secondary Education and Training

At this point in time what is the preferred outcome for this student?

- University
- Community college
- Technology/trade school
- Short-term job coaching
- Long-term job coaching

What supports will be needed for the student to successfully access this setting?

- Successful school skills training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin post-secondary educational planning.

- University: page 27
- Community college: page 27
- Technology/trade school: page 27
- Short-term job coaching: page 28
- Long-term job coaching: page 28



## 8. Guardianship

At this point in time what is the preferred outcome for this student?

- Independent person
- Conservatorship
- Limited guardianship
- Guardianship

What supports will be needed for the student to successfully access this setting?

- Decision making training
- Behavioral support
- Social skills training

After discussing possible outcomes follow the guide below to begin planning for guardianship.

- Independent person: page 29
- Conservatorship: page 30
- Limited guardianship: page 30
- Guardianship: page 30

## **Full Time Work/Part Time Work/Volunteer Work/Supported Employment**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family possible successful job placements for the student.
- Discuss as a family possible connections with employers for the student.
- Discuss as a family how full/part time work may affect current funding that the student receives. Consider contacting a benefits expert to explain this more fully.
- Help student to learn job skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration, if appropriate.
- Contact Vocational Rehabilitation, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Conduct a job preference assessment with the student.
- Conduct short-term job tries with the student.
- Conduct long-term job tries with the student.
- Implement vocational training into their educational program.
- Conduct mock interviews with the student, if appropriate.
- Teach student how to apply for jobs and fill out applications, if appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Workshop Setting**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family possible workshop settings for the student.
- As a family visit possible workshop settings for the student.
- Discuss as a family how funding will be used to pay for the workshop setting.
- Help student to learn job skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration.
- Contact Division of Services for People with Disabilities.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Conduct assessment to determine possible workshop tasks with the student.
- Implement workshop type vocational training into their educational program.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Day Program/Respite Care**

### ***Student and Family Steps***

- Discuss as a family possible day program settings/respice care for the student.
- As a family visit possible day program settings/respice care for the student.
- Discuss as a family how funding will be used to pay for the day program/respice care setting.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration.
- Contact Division of Services for People with Disabilities.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Align school training program with day program/respice care outcome.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Living Independently/Supported Apartment/Professional Parent**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family possible living options for the student, including roommate options.
- Discuss as a family how living cost will be funded.
- Visit possible housing options for the student.
- Help student to learn appropriate independent living skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration.
- Contact Division of Services for People with Disabilities.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's current daily living skills.
- Teach the student daily living skills necessary for independent living
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Respite Care**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family possible respite care options for the student.
- Discuss as a family how living cost will be funded.
- Visit possible respite care options for the student.
- Help student to learn appropriate independent living skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration.
- Contact Division of Services for People with Disabilities.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's current daily living skills.
- Teach the student daily living skills necessary for independent living to the extent necessary.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

### **Living with Family/Guardian/Caretaker**

#### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how living cost will be funded.
- Discuss as a family where student will live long term.
- Help student to learn appropriate independent living skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration.
- Contact Division of Services for People with Disabilities.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

#### ***School Steps***

- Assess the student's current daily living skills.
- Teach the student daily living skills necessary for independent living to the extent necessary.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Driver's License**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how student will gain access to a vehicle, insurance, and proper driver's training.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Connect the student with proper driver's education training.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).



## **Public Transportation**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how student will successfully access public transportation.
- Discuss as a family safety issues related to public transportation.
- Work with student at home to access the public transit system.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's current public transit skills.
- Teach student public transit skills.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Call-a-Ride**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how student will access call-a-ride.
- Sign student up for call-a-ride services.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Respite Care/Provider Transport**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how student will access transportation through respite care or provider.
- Discuss with respite care or provider transportation issues.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

**Family/Guardian/Caretaker Transport**

***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how student will transportation needs will be met.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

***School Steps***

- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

**Financially Independent/Partial Responsibility Spending/Leisure Spending/Family Managed**

***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will manage money.
- Help student to learn appropriate financial skills by teaching at home and setting up expectations with follow through.
- Contact Social Security Administration, if appropriate.
- Contact Division of Services for People with Disabilities, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

***School Steps***

- Assess the student's current financial skills.
- Include financial teaching into their educational program.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Independent Care**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will manage household and personal care.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Contact Medicaid, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's current daily living skills.
- Include daily living skills teaching into their educational program.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

**Partial Responsibility/Respite Care/Family Managed**

***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will manage household and personal care.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Contact Medicaid if appropriate.
- Contact Division of Services for People with Disabilities, if appropriate.
- Contact Social Security Administration, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

***School Steps***

- Assess the student's current daily living skills.
- Include daily living skills teaching into their educational program to the extent appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Community/Group Relationships**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will successfully access community/group relationships.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Teach student about safe community/group relationships.
- As a family explore groups, clubs, etc. that may interest the student.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's success with creating and maintaining community/group relationships.
- Include safe relationship training into their educational program to the extent appropriate.
- Connect student with school groups, clubs, etc. that may interest the student.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).



## **Intimate Relationships**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will access intimate relationships.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Teach student about safe intimate relationships.
- Discuss with student safe and proper dating practices.
- Discuss with student safe sex practices, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's success with creating and maintaining intimate relationships.
- Include safe relationship training into their educational program to the extent appropriate.
- Discuss with student safe and proper dating practices, if appropriate.
- Discuss with student safe sex practices, if appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Friendships**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will access friendships.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Teach student about safe and healthy friendships.
- Assist student in developing friendships outside of school.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's success with creating and maintaining friendships.
- Include safe relationship training into their educational program to the extent appropriate.
- Guide student in establishing safe and healthy friendships in school, if appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Family/Guardian/Caretaker Relationships**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will access family relationships.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Teach student about safe family relationships.
- Teach student necessary skills to establish and maintain family relationships.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's success with creating and maintaining family relationships.
- Include safe relationship training into their educational program to the extent appropriate.
- Teach student necessary skills to establish and maintain family relationships, if appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

**University/Community College/Technology/Trade School**

***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will successfully access the preferred setting.
- Contact the preferred school to begin the application process.
- Contact the school's disability resource center.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Contact Division of Services for People with Disabilities.
- Contact Social Security Administration.
- Contact Vocational Rehabilitation, if appropriate.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

***School Steps***

- Assess the student's current successful school skills.
- Teach necessary successful school skills.
- Ensure student is on track to access the preferred setting.
- Include successful school skills training into their educational program.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Short-Term Job Coaching/Long-Term Job Coaching**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will successfully access a job coaching situation.
- Discuss and contact potential employers willing to work with the student.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Contact Division of Services for People with Disabilities.
- Contact Social Security Administration.
- Contact Vocational Rehabilitation.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Assess the student's current job skills.
- Implement job training program into educational program.
- Conduct short-term job tries with the student.
- Conduct long-term job tries with the student.
- Conduct mock interviews with the student, if appropriate.
- Teach student how to apply for jobs and fill out applications, if appropriate.
- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Independent Person**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family how the student will make medical, financial, housing, and school/training decisions independently.
- Help student to learn appropriate skills by teaching at home and setting up expectations with follow through.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

## **Conservatorship/Limited Guardianship/Guardianship**

### ***Student and Family/Guardian/Caretaker Steps***

- Discuss as a family who will be chosen as guardian/conservator.
- Discuss as a family how the student will make decisions with their guardian/conservator.
- Discuss how the student's property and funds will be managed by the person chosen as guardian/conservator.
- Contact a local lawyer to assist in the process.
- Discuss details of guardianship/conservatorship document.
- Implement behavioral interventions in the home (if marked above).
- Implement social skills interventions in the home (if marked above).

### ***School Steps***

- Implement social skills program (if marked above).
- Implement behavioral intervention (if marked above).

Student Name

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School

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Date

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### Individual Plan

Directions: The focus should now be on developing an individualized plan for the coming year. This is the where the plan becomes individualized. Use this sheet as you go through the team discussion and planning guide. Mark down the primary goal in each section, for the family and for the school. Then mark down any other secondary goals for the team for the coming year. Remember to take into account the age of the student and make adjustments accordingly. When completed make a copy for each member of the team as well as place a copy in student file.

#### 1. Vocation and Day Program

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**2. Independent Living**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**3. Transportation and Community Access**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**4. Financial Responsibility**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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---

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**5. Household and Personal Care**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**6. Social Relationships**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**7. Post-Secondary Education and Training**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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**8. Guardianship**

*Student and Family/Guardian/Caretaker Primary Goal*

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Secondary Goals

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*School Primary Goal*

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Secondary Goals

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# **Resource Explanation and Contact List**

Directions: Use this list to find local resources for your student. Resources are categorized by their main function, but there are many overlapping services that may be provided through each agency. This list is not meant to be exhaustive and should be supplemented using team member knowledge. It should also be updated annually to reflect the most current information and resources.

### 1. Vocation and Day Program

**Vocational Rehabilitation-** This is a government agency that help people to locate, obtain and maintain a job. They can help with acquiring needed uniforms, training, or equipment for a job. Their services are typically short term and all related to vocational placements. People interested in using their services must go through an application process and meet eligibility requirements.

Website: <http://www.usor.utah.gov/division-of-rehabilitation-services>

Contact person- Debra Bowen

115 Golf Course Road, Ste. D, Logan, UT 84321

Phone: 435-787-3488 Fax 435-755-0463 Toll Free 1-800-560-9766 E-mail: [dbowen@utah.gov](mailto:dbowen@utah.gov)

**Department of Workforce Services-** The Choose to Work program at the department of work force services helps people to access the work force. They offer a variety of other programs as well.

Website: [www.jobs.utah.gov](http://www.jobs.utah.gov)

Contact Person- Sonia Powler 792-0311

180 North 100 West Logan UT 84321

Phone: 435-792-0300

**Desert Industries-** This is a vocational employment program that works with people of all abilities. The provide training in vocational skills. A reference is needed to participate in this program. The people that are accepted are hired and paid while work training.

Website: <http://deseretindustries.lds.org>

Contact: Todd Shaffer

175 West 1400 North Logan, UT 84341.

Phone: 435-752-4511

**Cache Employment and Training Center-** This organization provides day program services, supported employment services, youth summer programs, and home supports. Payment for services comes from government funding or personal funds.

Website: [www.cetcsupports.org](http://www.cetcsupports.org)

Contact- Kae Lynn Beacher or Sandy Smith

275 West 400 South Logan, UT 84321

Phone: 435-752-7952

**Developmental Skills Laboratory-** This organization is housed on the Utah State University campus and is designed to support adults with disabilities by training and maintaining the skills necessary for their greatest independence. They offer day program services, supported living services, supported employment service, respite services, and a youth summer program. Payment for services comes from government funding or personal funds.

Website: <http://www.cpdusu.org/projects/dsl/>

Contact Person- Drake Rasmussen

809 North 800 East, Logan, UT 84322-6800

Phone: 435-797-8528

## 2. Independent Living

**Options for Independence-** This organization is a nonresidential Independent Living Center where people with disabilities can learn skills to gain more control and independence over their lives. Options for Independence offers support groups, community integration programs, and a youth group program. They also help navigate other agencies processes such as obtaining funding. It is a non-profit organization.

Website: [www.optionsind.org](http://www.optionsind.org)

1095 North Main Street, Logan UT 84341

Phone: 435-753-5353 Ext. 103, Fax 435-753-5390

**Chrysalis-** This organization helps with residential services for persons who would like help living independently. They provide staff to help with daily living and independent living skills. They also have a day program and vocational services. Payment for services is provided through government funding or personal funds.

Website: [www.chrysalisutah.com](http://www.chrysalisutah.com)

Contact Person- Jeni Hadfield or Christian Frankowski

1780 North 200 East Ste. 101 Logan, UT 84321

Phone: 435-753-6606

**North Eastern Services-** This organization helps with residential services for persons who would like help living independently. They provide staff to help with daily living and independent living skills. They also have a day program and other services. Payment for services is provided through government funding or personal funds.

Website: <http://northeasternservicesutah.com/>

Contact Person- Rich Sharp

1465 North 300 West Ste. A, Logan, UT 84321

Phone: 435-753-4149

**Rise-** This organization helps with residential services for persons who would like help living independently. They provide staff to help with daily living and independent living skills. They also have a day program and other services. Payment for services is provided through government funding or personal funds.

Website: [www.riseservicesinc.org](http://www.riseservicesinc.org)

Contact Person- Michelle Molen

40 West Cache Valley Blvd, Building 8 Suite B Logan UT

Phone: 435-752-2405      Toll Free 1-800-257-2405

E-mail: [michelem@riseservicesinc.org](mailto:michelem@riseservicesinc.org)

### 3. Transportation and Community Access

**Logan Transit District Call-A-Ride-** This is a free service for people with disabilities in Cache Valley. There is a qualification process and requirements for usage.

Website: <http://www.cvtdbus.org/MIRideInformation/accessibility.php>

Contact: ADA Paratransit Specialist

150 East 500 North

Logan, UT 84321

Phone: (435) 792-3122



#### 4. Financial Responsibility

**Division of Services for Persons With Disabilities (DSPD)-** This is a government agency that serves and provides funding for individuals with severe disabilities. Individuals must go through a qualifying process before receiving funding/services. DSPD receives funding through appropriations from the legislature. Typically, DSPD is not able to offer immediate services to eligible individuals. As such, they are placed on a waiting list. Because of anticipated wait time, it is important to begin the DSPD process as soon as possible. The DSPD website provides more information on how to apply, and what information is required.

Website: [www.dspd.utah.gov](http://www.dspd.utah.gov)

195 North 1950 West, Salt Lake City, UT

Phone: (801) 538-4200 or Toll Free: 1-800-837-6811

Local Contact: Leslie Howell

E-mail: [lesliehowell@utah.gov](mailto:lesliehowell@utah.gov)

**Social Security Administration-** This is a government agency that provides disability income to help people with disabilities meet their basic needs. People interested must meet eligibility requirements and go through the application process. This can be a lengthy process and may require multiple contacts with the Social Security Administration.

Website: [www.socialsecurity.gov](http://www.socialsecurity.gov)

2nd Floor FOB

324 25th Street, Ogden, UT

Phone: 1-877-378-9081

#### 5. Household and Personal Care

**Medicaid-** This is a government agency that provides health insurance and funding for health-related items. People interested must meet eligibility requirements and complete an application process.

Website: [www.medicaidusa.com](http://www.medicaidusa.com)

Phone: 435-792-0300 866-435-7414

## 6. Social Relationships

**Best Buddies-** This is a non-profit organization that pairs people with disabilities in one to one friendships with college students. The college students volunteer their time.

Website: [www.bestbuddiesutah.org](http://www.bestbuddiesutah.org)

Contact: Student Involvement and Leadership Office at Utah State University

TSC Room 326, 1600 Old Main Hill, Logan, UT, 84322

Phone: 797-2912

E-mail: [bestbuddies.usu@aggiemail.usu.edu](mailto:bestbuddies.usu@aggiemail.usu.edu)

**Camp Kostopulos-** This is an accredited residential summer camp for kids and adults with disabilities. They offer many different types of camps including one that travels by van to locations around the mountain west.

Website: <http://www.campk.org/>

4180 Emigration Canyon Road, Salt Lake City, UT 84108

Phone: 801-582-0700

**Common Ground-** This organization provides outdoor experiences and activities (i.e. camping, canoeing, snowshoeing, skiing, etc.) for persons of all abilities. They have monthly organized activities and equipment that can be rented for personal activities.

Website: [www.cgadventures.org](http://www.cgadventures.org)

Contact Person- Bryce Patten

335 North 100 East Logan, UT 84321

Phone: 435-713-0288

**Special Needs Institute-** This is a church doctrine class run through the Church of Jesus Christ of Latter Day Saints. Church membership is not required. This is for people ages 18 or older. The class discusses basic church principles. USU college students also attend the class as peer tutors. For information on class times, visit [www.ldscs.org/logan](http://www.ldscs.org/logan)

Contact: Wendy Parker

600 Darwin Avenue

Logan, UT USA 84321

Phone: 435-752-4265

E-mail: [parkerwe@ldsces.org](mailto:parkerwe@ldsces.org)

**Special Needs Mutual-** This is a free program for students ages 18 and older. This program is run through the Church of Jesus Christ of Latter Day Saints. Church membership is not required. This is held on Thursdays from 6:30 to 8:30, September through May. The valley is split into North and South areas.

North Contact: Joyce and Lewis McCombs

South Contact: Pat and Dori Burt

Phone: 435-752-4265

**Special Olympics-** Participants in Special Olympics develop skills, build self-esteem, and have fun while participating in year-round sports training and competitions. Whatever their age or skill level Special Olympics has something for every person with a disability. Special Olympics events are typically held on Saturday mornings.

Website: [www.sout.org](http://www.sout.org)

Contact: Tom Bryner

Phone: (435)-764-7513

E-mail: [specolympics@aggiemail.usu.edu](mailto:specolympics@aggiemail.usu.edu)

## 7. Post-Secondary Education and Training

**Disability Resource Center-** The mission of this organization is to provide qualified persons with disabilities equal access to University programs, services, and activities. This program is provided through Utah State University.

Website: [www.usu.edu/drc](http://www.usu.edu/drc)

Contact Person- Chris Lord

Old Main Hill, Logan UT 84322

Phone: 435-797-0359

## 8. Guardianship

**Disability Law Center**- This organization provides self-advocacy assistance, legal services, disability rights education, and public policy advocacy on behalf of Utah residents with disabilities. Their services are available statewide and without regard for ability to pay.

Website: [www.disabilitylawcenter.org](http://www.disabilitylawcenter.org)

205 North 400 West Salt Lake City, UT 84103

Phone: 801-363-1347/ Toll free 800-662-9080

**Guardianship Associates of Utah**- This is a non-profit organization that provides direct guardianship services. GAU is currently the only agency to directly contract with the Office of Public Guardian to provide public guardianship to individuals in the state of Utah.

Website: [www.guardianshiputah.org](http://www.guardianshiputah.org)

180 South 300 West #310, Salt Lake City, UT 84101

Phone: 801-533-0203

**Lawyers**- These lawyers help parents become legal guardians of their child after the child is of legal age to make their own financial and medical decisions. Guardianship in some form is an important safeguard for some students. The lawyers can also provide information on special needs trusts.

Contact Person: Suzanne Marychild

45 East 200 North Suite 105, Logan, UT 84321

Phone: 435-213-3408

Contact Person: Elizabeth Ferrin

187 East 1600 North, North Logan, UT 84341

435-535-3173

### Extra Resources

**Aspen Grove Advocacy**-This is a private disability support coordination company. They are advocates for people with disabilities. They hold annual meetings with families and providers to help coordinate DSPD services and supports.

Website: <http://www.aspengroveadvocacy.com/>

P.O Box 125, Logan, UT 84323

**Center for Persons with Disabilities (CPD)**- The CPD oversees 70 programs and projects related to persons with disabilities. Their website shows a list of current projects.

Website: [www.cpd.usu.edu](http://www.cpd.usu.edu)

6800 Old Main Hill Logan UT 84322

Phone: 435-797-1981

**Family to Family Network**- This is a volunteer network made up of family members of people with disabilities. Their mission is to educate, strengthen, and support families of persons with disabilities. There are local networks all across the state of Utah that host regular meetings and activities.

Website: [www.utahfamilytofamilynetwork.org](http://www.utahfamilytofamilynetwork.org)

Phone: 800-468-1160      801-272-1051

Local Contact Person: Lora Meerdo

Phone: 435-760-0741

E-mail: [lmeerdo@comcast.net](mailto:lmeerdo@comcast.net)

**Utah Parents Center**- The Utah Parent Center is an organization that provides support and help for parents of students with disabilities. They believe that parents are full partners in the decision making process that directs their child's care and programs, and as such can provide significant support to other parents in similar situations.

Website [www.utahparentcenter.org](http://www.utahparentcenter.org)

230 West 200 South Suite 1101, Salt Lake City, UT

Phone: (801) 272-1051 or for Spanish: (801) 272-1067

Email [upcinfo@utahparentcent.org](mailto:upcinfo@utahparentcent.org)

**Utah Assistive Technology Program (UATP)**- UATP provides assistive devices and services, and trains university students, parents, children with disabilities, and professional service providers about assistive technology.

Website: <http://www.uatpat.org/>

6855 Old Main Hill Logan UT 84322

**USU Assistive Technology Lab**- The lab provides fabrication, equipment loan, and repair of assistive technology devices.

Website: <http://www.uatpat.org/>

Contact: Clay or Amy

6855 Old Main Hill Logan UT 84322-6855

Phone: 435-797-0699

**Utah Assistive Technology Program UATP Assistive Technology Library-** The AT Lab houses a state of the art computer lab and fabricating shop. Individuals can test various software and hardware devices or find assistance to design, fabricate, modify or repair AT equipment to enable a person to become more independent. Low interest loans for AT devices are available as well through free online trainings.

Website: <http://www.uatpat.org/>

6855 Old Main Hill Logan UT 8432

Toll free 1-800-524-5152 or 435-797-7412

School \_\_\_\_\_

Team \_\_\_\_\_

### Teacher Training

- Teacher will administer student assessment during school hours.
- Teacher will determine if written assessment or assessment with picture cues is most appropriate.
- Teacher can read assessment and act as scribe to students who require accommodations.
- Teacher will retain student copy until the meeting and bring copy to the meeting.
- Teacher will send home parent survey at least 1 week prior to the meeting.
- Teacher will inform families of the necessity of bringing parent survey to the meeting.
- Teacher will fill out teacher survey and bring copy to the meeting.
- Teacher will lead discussion at the meeting.
- Teacher will include all members of the team in discussion; students, parents, and teacher.
- Teacher will follow cues within the team discussion to guide the team.
- Teacher will use the individual plan sheet to write goals for both family and school in each section as the team discusses options and supports as they move through the team discussion and planning guide.
- Teacher will use resource explanation and contact sheet to guide families in finding local resources to meet family goals.
- Teacher will use information from individual plan to develop transition IEP.
- Teacher will give families a copy of individual plan for use in the home.
- Teacher will place copies of all surveys, summary sheets, and individual plan into the student file for future use.
- A shortened mock meeting will be conducted with the teacher.
- Any questions from the teacher will be answered.
- Paper/pencil test will be administered until 90% accuracy is achieved.

School \_\_\_\_\_

Team \_\_\_\_\_

**Teacher Training Paper and Pencil Test**

1. When and where will the student assessment be administered?  
\_\_\_\_\_  
\_\_\_\_\_
2. Who decides if students will use the written assessment or the assessment with picture cues?  
\_\_\_\_\_  
\_\_\_\_\_
3. Can the teacher read and act as scribe for students completing the assessment?  
\_\_\_\_\_  
\_\_\_\_\_
4. Who keeps the student assessment before the meeting and brings the student assessment to the meeting?  
\_\_\_\_\_  
\_\_\_\_\_
5. How long before the meeting should the parent assessment be sent home?  
\_\_\_\_\_  
\_\_\_\_\_
6. Do the families need to bring their assessment copy to the meeting?  
\_\_\_\_\_  
\_\_\_\_\_
7. What does the teacher need to bring to the meeting?  
\_\_\_\_\_  
\_\_\_\_\_
8. Who leads the team discussion?  
\_\_\_\_\_  
\_\_\_\_\_
9. Who needs to be included in the team discussion?  
\_\_\_\_\_  
\_\_\_\_\_
10. What does each team members do with the summary sheet after the meeting?  
\_\_\_\_\_  
\_\_\_\_\_



School \_\_\_\_\_

Team \_\_\_\_\_

**Treatment Integrity Measure**

1. Teacher administered student assessment during school hours.
2. Teacher determined if written assessment or assessment with picture cues is most appropriate.
3. Teacher read assessment and act as scribe to students who needed those types of accommodations.
4. Teacher retained student copy until the meeting and brought copy to the meeting.
5. Teacher sent home parent survey at least 1 week prior to the meeting.
6. Teacher informed families of the necessity of bringing parent survey to the meeting.
7. Teacher filled out teacher survey, summary sheet and brought copy to the meeting.
8. Parent filled out parent survey, summary sheet and brought copy to the meeting.
9. Teacher brought copies of individual plan and team discussion planning guide to the meeting.
10. Teacher lead discussion at the meeting.
11. Teacher included all members of the team in discussion; students, parents, and teacher.
12. Teacher used resource information and contact sheet to guide families in finding local resources to meet family goals.
13. Team discussed options, necessary supports, and developed goals for each of the following areas.

		Options	Supports	Goals
<input type="checkbox"/>	Vocation and Day Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Independent Living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Transportation and Community Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Financial Responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Household and Personal Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Social Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Post-Secondary Education and Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Guardianship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Teacher used information from individual plan to develop transition IEP.
15. Teacher gave families a copy of individual plan for use in the home.
16. Copies of all surveys, summary sheets, and individual plan are stored in student file for future use.



