

# An Agency Guide to Understanding Transition in New York: The IDEA Way

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Elizabeth W. Hall, Ph.D., PRSE  
Assistant Professor of Education  
State University of New York – College at Geneseo

Tabitha Buggie-Hunt, Ed.M  
Director of Disability Services  
State University of New York – College at Geneseo

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## Preface

In October 1990, the United States Congress enacted Public Law 101-476 amending the Education of All Handicapped Children Act (EHCA). The amendments resulted in several important changes, including

- \* Changing the title of the law to the Individuals with Disabilities Education Act (IDEA)
- \* Changing the legislative language to read individuals with disabilities rather than handicapped children
- \* Listing transition as one of the service areas to be addressed on individual education plans (IEPs). Transition services were to begin at age 16, younger if necessary.
- \* The enactment of interagency collaboration.

In 1997, the United States Congress amended IDEA and enacted Public Law 105-17, now called Individuals with Disabilities Education Act, Amendments 1997 (IDEA '97). These amendments resulted in several important changes, including

- \* Changing transition services to begin at 14, younger if necessary.

In defining transition, IDEA and IDEA '97 include requirements that directly affect how schools provide transition services for students who are age 14 or older. Many New York school districts provide an array of transition services, while in other districts such services are almost nonexistent.

The purpose of this service agency guide is to assist service agency personnel in implementing the transition services requirements outlined in IDEA and IDEA '97. One aspect of this implementation is to redefine the IEP process to include students with disabilities who are age 14 and older (and younger if appropriate) in transition activities. The new definition calls for greater collaboration between schools and other service providers in the IEP process. Students with disabilities who are planning to attend college upon graduation from high school, as well as students who will enter the work force with ongoing support, are required to have transition

services addressed on their IEP. This guide specifically addresses information needed to provide high quality transition services through the IEP process.

The service agency guide offers an overview of the transition service requirements of IDEA and IDEA '97 and suggested methods to address the requirements. It is divided into eight sections:

- \* Background Information
- \* The IEP Process
- \* The Transition IEP/Transition IEP Meeting
- \* The Transition Checklist and Timeline
- \* Interagency Collaboration
- \* Laws/Regulations and Frequently Asked Questions
- \* Transitioning to Post-Secondary Education
- \* Appendices

The Appendices describe additional resources and services information, offers definitions of terms and acronyms used in transition services and the IEP process, and provides checklists and forms outlined within the guide. Users are encouraged to copy and share this guide.

# An Agency Guide to Understanding Transition in New York: The IDEA Way

Section

A

**Background**



## **Challenges Facing Secondary Students in Transition**

With the reauthorization of IDEA in 1997, significant new requirements were put into place to ensure students greater access to the general education curriculum and assessment systems. IDEA '97 also expanded on previous transition requirements by requiring that the IEP include, at age 14 or earlier, a statement of transition service needs that focuses on the student's courses of study (such as participation in advanced placement courses or vocational education programs). The IEP must also include, beginning at age 14 or younger, a statement of needed transition services and interagency responsibilities or any needed linkages. The current challenge is to integrate and align these transition requirements that give students with disabilities greater access to the general education curriculum and assessment systems.

Students with disabilities have also experienced difficulties in meeting state and local graduation requirements, and concerns are mounting about the relationship between students' academic experiences and the formulation of post-high school transition plans that address how students will access postsecondary education, employment, and community living opportunities (Guy, Shin, Lee, & Thurlow, 1999; Johnson, Sharpe, & Stodden, 2000; Policy Information Clearinghouse, 2000; Stodden & Dowrick, 2000). There is additional concern about the limited levels of service coordination and collaboration among schools and families in achieving post-high school result.

### **Access to the General Education Curriculum - Issues and Challenges**

IDEA '97 provides many students with disabilities new opportunities to participate in and benefit from a wide array of general education courses and learning experiences. A major goal of accessing the general education curriculum is to prepare students to earn a diploma and help them transition to adult life. Although the general education curriculum contains both academic (e.g., math, science) and nonacademic (e.g., career education, arts, citizenship) domains, student performance is assessed primarily in academics. As a result, it is not uncommon for portions of the general curriculum as well as transition goals to receive limited or no attention (Hasazi, 1999; Warren, 1997). Efforts must be undertaken to ensure that students with disabilities remain on a full "curriculum" track, with learning expectations that guide the instruction of general education students. IEP teams must work to ensure that high expectations are maintained and students are

afforded opportunities to develop skills through a wide range of curriculum options, including vocational education, service learning, community work experience, and adult living skills.

Access to the general education curriculum requires more than common standards, the integration of academic and applied learning and universal design. It also depends on factors such as the knowledge and skill levels of educators, appropriate instructional materials and strategies, use of accommodations during instruction and testing (Elliott & Thurlow, 2000; Thurlow, Elliott & Ysseldyke, 1998; Thurlow, House, Boys, Scott, & Ysseldyke, 2000), and collaboration between general education personnel and special education personnel in designing educational programs for students with disabilities.

There is a critical need to develop assessment, curriculum, and instructional strategies that are relevant to all students (including those who drop out, those who have significant learning needs, and those who may choose to continue on to post-secondary education), allowing them to successfully achieve state and local standards, as well as to develop other essential adult life skills through vocational education, training in adult living skills, and community participation. Secondary education and transition models are also needed that integrate academic, career, work-based, service learning, and other learning experiences.

#### Access to General Education Curriculum - Recommendations

To ensure that students with disabilities access the full range of general education's curricular options and learning experiences, Johnson (2002) stated that there is a need to:

- \* Promote high expectations for student achievement and learning. High expectations must be maintained for student with disabilities across the full range of academic and nonacademic courses and programs available within middle schools and high schools nationally. This is consistent with the Bush administration's blueprint for "No Child Left Behind," that makes schools accountable for ensuring that all students, including students with disadvantages, meet high academic standards. In order to maintain high academic standards, instructional strategies that promote differential teaching, universal design, integrated academic and applied learning, and other practices will need to be broadly adopted.
- \* Make systematic and appropriate use of assessment and instructional accommodations. General education and special education teachers need information and skills on how to appropriately use accommodations in assessment and instructional situations. Improved

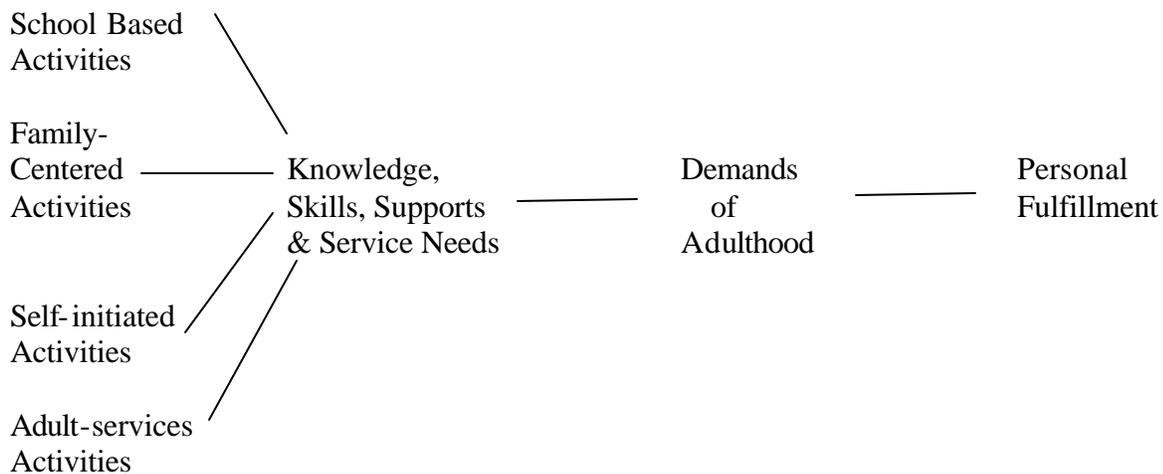
teacher preparation at the pre-service and continuing educational levels, promotion of collaborative teaching models, and other strategies are needed to address this issue. State and local agencies are also grappling with inconsistent policies, procedures, and practices on the use of accommodations. Consequently, accommodations are many times viewed as unacceptable in meeting state or local district testing conditions, often overused in the hope of "boosting" student performance and commonly considered too expensive and difficult to implement. The latter factor often results in students not receiving needed accommodations.

- \* Ensure that students have access to the full range of secondary education curricula and programs. Students' IEPs must focus on the broadest range of curriculum and programs that support students with disabilities in successfully meeting state academic and related standards as well as developing essential adult skills. In addition to the academic focus of the general education curriculum, high school curricular options must also involve students with disabilities in community-based work experience, vocational education, drop-out prevention and re-entry programs, independent living skills programs, Tech Prep programs, and service learning opportunities.

## What Does Transition Mean?

Transition refers to a change in status from behaving primarily as a student to assuming emergent roles in the community. These roles include employment, participating in postsecondary education, maintaining a home, becoming actively involved in the community and experiencing satisfactory personal and social relationships. The process of enhancing transition involves the participation and coordination of school programs, adult agency services, and natural supports within the community. The foundation for transition should be laid during the elementary and middle school years, guided by the broad concept of career development. Transition planning should begin no later than age 14, and students should be encouraged, to the fullest extent of their capabilities, to assume a maximum amount of responsibility for such planning. (Halpern, 1994, p. 117)

## Adulthood Implications of the Transition Process



## What is Transition Planning?

Transition planning is a partnership involving students with disabilities, their families, school and post-high school service personnel, local community representatives, employers, and neighbors. Its purposes are to help the student choose a living situation to ensure that the student graduates with community living skills and to explore the further education or vocational training or a career if that is a desired outcome. Because young people with disabilities have

different levels of impairments and capabilities, transition planning needs to be flexible to meet a variety of needs. Such planning begins early, with the expectation that students have opportunities and experiences during their school years to prepare them for post-high school environments as well as time to adjust strategies along the way.

To be effective, transition planning should be an intrinsic component of the student's IEP. Progressive schools provide curriculum that prepares students for the changes and demands of life after high school. Such innovative programs offer skills instruction in natural (rather than simulated) environments, including home, work places, and community sites such as grocery stores, offices, and restaurants.

The years of transition from school to adulthood are difficult for everyone, but especially for young people with disabilities. They leave the structured environment of school and go out into the community to face the maze of public and private agencies, which often have long waiting lists for services with different eligibility criteria. The most effective transition planning involves students and parents as leaders in mapping the educational experience and the years after graduation. Empowering the student and the family to do their own case management, become involved in policy-making bodies, and contribute as equal partners in the IEP process is paramount to successful transition outcomes.

Student involvement is essential in the Transition IEP process. Desired post-high school outcome statements, annual goals, and short-term objectives should be developed from a clear vision of where the student wants to live, work, and participate in community life. IDEA requires that:

- \* transition services be based on individual student needs, preferences, and interests
- \* the student shall be invited to IEP meetings if transition services are to be considered
- \* the IEP team documents how the student's preferences and interests were considered if the student chooses not to attend.

Involvement of the student in the Transition IEP meeting will help IEP team members focus on planning for desired post-high school outcomes and to view each individual student as a whole person. Involvement in the transition planning process will also help students:

- \* see themselves as responsible for planning for their future
- \* work to see that plans are achieved
- \* increase their ability to self-advocate and to make independent decisions and choices

- \* understand the importance of exploring career and adult living alternatives.

Public policy has given students with disabilities, and the educators who serve them, a clear message regarding transition from school to work or postsecondary education. In addition to IDEA, two laws supporting transition are: Public Law 101-392, the Carl D. Perkins Vocational and Applied Technology Education Act, and Public Law 101-336, the Americans with Disabilities Act. Each of these laws gives additional strength and direction regarding the design of transition programs and support services.

The intent of transition planning is to enable youth with disabilities to live, work, and continue to learn in the community with supports if necessary. The process of developing transition plans actively involves students in transition planning and supporting students in achieving their desired adult goals. Family members and other community service agencies are informed, involved, and invested in transition planning for each student. The plan should address services and supports across all areas. Also, these services and supports should be provided in a timely manner. The accomplishment of outcomes is evaluated in terms of students successfully achieving their post-high school living, education, and vocational goals.

In summary, there are several guiding principles to transition services including:

- \* Transition efforts should start early.
- \* Planning must be comprehensive.
- \* The planning process must balance what is ideal with what is possible.
- \* Ranking of transition needs must occur.
- \* Student empowerment / self-advocacy is essential.
- \* Family involvement is crucial.
- \* The transition planning process must be sensitive to diversity and abilities.
- \* Community-based activities and support are important.
- \* Interagency commitment, cooperation, and coordination must be strengthened.
- \* Timing is critical if appropriate links are to be made and a seamless and successful transition to life after high school is to be achieved.
- \* The transition planning process should be considered a capacity-building activity.
- \* Transition planning is beneficial to all students, but is essential for students with disabilities.

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Section  
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**The IEP Process**



## **Section 200.4: Procedures for Referral, Evaluation, Individualized Education Program (IEP)**

### Individual Evaluation

Requires the individual evaluation to include a variety of assessment tools and strategies, including information provided by the parent, to gather relevant functional and developmental information about the student and information relating to enabling the student to participate and progress in the general education curriculum.

### IEP Development

Adds to the considerations that a Committee on Special Education (CSE) must make in the development of a student's IEP; the results of the initial or most recent evaluation; the student's strengths; the concerns of the parent; the results of the student's performance on any general State or district-wide assessment programs and any special considerations (including a student's need for assistive technology devices and services).

Amends the requirements for what must be indicated on a student's IEP.

Eliminates the requirement that the IEP include the extent to which the student will participate in regular education.

Requires that the IEP include needed activities relating to transition in the areas of instruction, related services, community experiences, the development of employment and other post-high school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation.

Repeals the requirement that the IEP state the reasons upon which the determination was made if transition activities are not provided in any one of the above areas.

Requires the IEP to include a statement if the Committee, in considering the special factors, determines that a student needs a particular device or service.

Requires the school district to ensure, if the recommended placement is to be in a private school or agency, that a representative of a private school or agency attends the CSE meeting (or participate through other methods).

Requires that, in selecting the least restrictive environment, a student with a disability must not be removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

**Excerpts from New York State Part 200 Regulations that relate to transition and the IEP Process...**

When a transitional support service is included in the individualized education program to be provided to teachers of a student with a disability, such service shall be provided by personnel appropriately certified or otherwise qualified in each area of service.

Transitional support services prescribed in the individualized education program (IEP) shall be provided for a teacher upon the recommendation of the CSE and shall be specified in the student's IEP. When the provision of a transitional support service is under consideration by the CSE, the teachers of the student for whom the service is being considered shall be given the opportunity to participate in the meeting of the Committee for the purpose of advising the Committee of the extent to which such services are needed.

Participating agency means a State or local agency, other than the public agency responsible for a student's education, which is financially and legally responsible for providing transition services to the student.

Transitional support services means those temporary services, specified in a student's IEP, provided to a regular or special education teacher to aid in the provision of appropriate services to a student with a disability transferring to a regular program or to a program or service in a less restrictive environment.

Transition Services means a coordinated set of activities for a student with a disability, designed within an outcome-oriented process, that promotes movement from

school to post-high school activities, including, but not limited to, post-secondary education, vocational training, integrated competitive employment (including supported employment), continuing and adult education, adult services, independent living, or community participation. The coordinated set of activities must be based on the individual student's needs, taking into account the student's preferences and interests, and shall include needed activities in the following areas:

- (1) instruction
- (2) related services
- (3) community experiences
- (4) the development of employment and other post-high school adult living objectives; and
- (5) if appropriate, acquisition of daily living skills and functional vocational evaluation.

**Section 200.4: Procedures for referral, evaluation, individualized education program (IEP) development, placement and review**

...provide for those students age 14 and updated annually, a statement of the transition service needs of the student under applicable components of the student's IEP that focuses on the student's course of study, such as participation in advanced-placement courses or a vocational education program;

...provide, for those students age 15 (and at a younger age, if determined appropriate) a statement of the needed transition services as defined in section 200.1 of this Part including a statement of the responsibilities of the school district and, when applicable, participating agencies for the provision of such services and activities that promote movement from school to post school opportunities, or both, before the student leaves the school setting. Needed activities shall be provided in each area specified in section 200.1(fff)(1) through (4) and, as appropriate, (5) of this Part.

If the purpose of the meeting is to consider the need for transition services, the school district shall invite the student and a representative of the agencies likely to be responsible for providing or paying for transition services. If the student does not attend, the district shall take steps to ensure that the student's preferences and interests are considered. If an agency invited to send a representative to a meeting does not do so, the district shall take steps to involve the other agency in the planning of any transition services.

If a participating agency fails to provide agreed-upon transition services contained in the student's IEP, the district responsible for the student's education shall, as soon as possible, initiate a meeting to identify alternative strategies to meet the transition objectives and, if necessary, revise the student's IEP. Nothing in this Part shall relieve any participating agency of its responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet its eligibility criteria.

...if the purpose of the meeting is to consider transition services, the meeting notice must also:

- (a) indicate this purpose;
- (b) indicate that the district will invite the student; and
- (c) identify any other agency that will be invited to send a representative.

## **Changing the Way Transition is Addressed in the IEP Process**

### **IEP Implementation**

Requires that there be no delay in implementing a student's IEP, including any case in which the payment source for providing or paying for special education to the student is being determined.

Requires that each regular education teacher, special education teacher, related service provider and other service provider who is responsible for the implementation of a student's IEP have access to a copy of the student's IEP and that they be informed of their specific responsibilities related to implementing the IEP.

Following is a list of changes that many teachers are making to help them more effectively incorporate the transition requirements into the IEP process.

### **Prior to the IEP meeting:**

1. Make sure the student understands the importance of attending his/her IEP meeting and encourage him/her to take an active role in this process;
2. Meet with the student to review information about his/her preferences and interests;
3. Ask the student to talk about his/her vision and long-term goals;
4. Talk with the student about classes he/she could take in school that would help him/her to achieve future goals;
5. Meet with the student to talk about areas of strength; discuss skill areas that need to be worked on now and in the future (use the skill areas listed on the IEP to guide the discussion);
6. Have a discussion with the parents about the transition process so they can formulate thoughts, ideas, and questions prior to the meeting; and
7. Develop a list of agencies that includes names of contact people and phone numbers that can be used as a resource for inviting agency representatives to attend the meeting.

### During the IEP meeting:

1. Conduct the IEP meeting to actively involve the student and the family;
2. Allow transition to drive the IEP process; begin with a discussion about the student's vision and long-range goals and use that information to guide the development of the IEP;
3. Use an addendum or minutes page to organize the "coordinated set of activities" and keep track of who has agreed to provide and pay for them; and
4. Remember that special education is not solely responsible for the provision of transition services; special education teachers can oversee, facilitate, and organize services that will be delivered by others.

### How can districts initiate the transition process?

1. Districts are advised to develop a strategic plan for incorporating transition services within the IEP process.
2. To implement transition planning and services, the CSE will need a method for identifying post-high school outcomes for each student and for incorporating activities in the IEP that prepare the student to fully participate in adult life in the community.

### Eleven Steps to the Self-Directed IEP

1. Begin the meeting by stating the purpose
2. Introduce everyone
3. Review past goals and performance
4. Ask for other's feedback
5. State your school and transition goals
6. Ask questions if you do not understand
7. Deal with differences in opinions
8. State what supports you will need
9. Summarize your goals
10. Close the meeting by thanking everyone
11. Work on IEP goals all year

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Section  
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**The Transition IEP component  
of the Transition IEP Meeting**



The Transition IEP team meets annually to review the student's IEP and revise as appropriate. The annual IEP meeting allows the Transition IEP team to update the student's desired post-high school outcome statement, revise the annual goals and short-term objectives as needed, and determine the needed transition services for the upcoming year.

Transition IEP team members continue to modify the student's transition portfolio throughout the year by adding new background information and updating progress toward annual goals and short-term objectives. This information is useful when reviewing and revising the IEP.

The Transition IEP process contains several essential components that must be followed for effective planning for students who are leaving school for post-high school services. The more knowledgeable service agency team members are with these components, the more actively involved they will become. The quality of the transition process depends on the active participation of all team members.

Agency representatives may be active participants on Transition IEP teams by providing the following input before, during, and after Transition IEP meetings:

- \* Agency guidelines/purpose
- \* Agency services options
- \* Agency procedures for eligibility
- \* Transition services
- \* Contact personnel
- \* Sponsored programs

## **The IEP Process: The Transition IEP and/or Transition IEP meeting**

The time before the Transition IEP meeting is a crucial period. Careful planning and organization will help contribute to a smooth, productive meeting. Good pre-planning activities can also help reduce the total time team members are at the meeting itself. The following considerations can help guide Transition IEP team members, especially participants from service agencies, through the pre-planning phase of a Transition IEP meeting.

Transition IEP team members should become familiar with the transition services available in the community. In many school districts there is a printed matrix of available services that are located in the community that directly relate to the transition process. The matrix identifies services provided by agencies and community providers to meet the student's needs and interests.

A signed release of information must be obtained from the student's parents before any personally identifiable information can be sent to agencies or before agency representatives can attend a Transition IEP meeting to discuss a student's need for transition services. The Appendices contain a sample form for the mutual exchange of information.

In preparation for developing the Transition IEP, the team must review the student's background information. Background information can be gathered from the student's cumulative records, teacher files, the student's vocational assessment, and, if available, a transition portfolio.

A transition portfolio is suggested as an effective technique to maintain, in one place, all pertinent transition-related information. The student's transition portfolio may include

- \* A functional vocational assessment (e.g., academic achievement, interests, daily living skills, work behavior, work personality, situational assessment, and structured interviews)
- \* The student's community-based instruction and experiences
- \* The student's work history (e.g., jobs held, length of time on the job, supervision required, job preferences)
- \* Past and current educational plans

- \* The student's residential history (e.g., living arrangements, level of supervision required, needed support)
- \* Vocational and career education courses taken and services used
- \* Academic achievement information and progress toward meeting requirements eligibility
- \* Any other relative information (e.g., student, family, and/or agency questionnaires).

A transition portfolio provides a history of the student from kindergarten through twelfth grade. Team members can benefit from information from as early in the student's school career as possible. This information is updated frequently to ensure maximum usefulness for the IEP team.

Compilation of background can be helpful in completing a pre-planning form. A pre-planning form covers

- \* Potential desired post-high school outcomes in the areas of education, work, community, and residential alternatives
- \* Present levels of abilities and needs
- \* Anticipated instructional needs, services, and supports.

The Transition IEP coordinator completes a pre-planning form based on information from cumulative records and the transition portfolio. The form may be printed on self-carbon paper or copied for distribution to the student, family, and appropriate team members for feedback. In addition, a pre-meeting information form is a good way to share pre-planning information and determine if there are any additions or changes needed. Collaboration with the student, family members, and agency representatives prior to the meeting about how services are to be provided can also help identify and rectify obstacles to service delivery. Some questions for the student to think about before the meeting can be found in the Appendix.

The meeting may be scheduled in different ways. The person responsible for scheduling the meeting may consult with the student, family, and appropriate agency members to determine the best time for all to attend. Another approach is to schedule meetings well in advance and encourage family members to call if they encounter a conflict. Once family members provide

scheduling information, the Transition IEP coordinator confirms schedules with adult service representatives and other school providers (Baer, Simmons, Flexer, and Izzo, 1992).

Representatives from service agencies may receive an invitation packet from the Transition IEP coordinator. The packet may include a letter of invitation for the family and the student and a copy of the pre-planning form. The letter of invitation will

- \* Give the date, time, and location of the meeting
- \* Indicate the purpose of the meeting is to consider transition services
- \* Notify meeting participants that the student will be invited
- \* Identify the agencies invited to send a representative.

The Transition IEP team will likely include additional school district personnel and representatives of community agencies. Team members may change from meeting to meeting, depending on the individual student's needs. In addition to the parent(s), student, Local Education Agency (school) representative, and the student's teacher, other potential team members for inclusion on a Transition IEP team include

- \* Principal
- \* Basic education teacher(s)
- \* Vocational education teacher
- \* Job training coordinator, employment specialist, or job coach
- \* Work study coordinator
- \* Guidance counselor
- \* Occupational or physical therapist
- \* Speech therapist
- \* Local Deaf Service Center representative
- \* Alcohol, Drug Abuse and Mental Health representative
- \* Children's Medical Services representative
- \* Children and Family Services representative
- \* Developmental Services representative
- \* Division of Vocational Rehabilitation representative
- \* Division of Blind Services representative

- \* Community College or 4-Year College representative
- \* Community mental health service provider
- \* Others at the discretion of the parents or school district.

The pre-planning form and a letter of invitation may be distributed to appropriate agency representatives.

The Transition IEP meeting packet contains

- \* An IEP form (the resource section contains a sample Transition IEP form.)
- \* Background information materials (transition portfolio)
- \* All copies of the pre-planning form
- \* Any additional feedback from the student, the family, or the additional team members

Once the Transition IEP coordinator reviews pertinent background information, selects team members, and obtains their input, the Transition IEP meeting can convene. The process of developing a Transition IEP is similar to regularly convened IEP meetings, but the final IEP product may be different.

The Transition IEP coordinator has the responsibility of guiding the team through planning activities to develop an individualized, outcome-oriented, and appropriate education plan for a specific student. Each Transition IEP is unique: just as each student is unique. The Transition IEP coordinator uses creative facilitation skills to effectively individualize each Transition IEP and involve all team members, including representatives from service agencies.

The Transition IEP coordinator is in charge of the planning process, which means asking the right questions, listening, clarifying team members' responses, distilling team input into usable concepts, and helping to translate ideas into action with the assignment of responsibility (Sample et. al., 1990).

The following sections describe key components of the process of developing IEPs that address transition services. Agency personnel will become more active participants through a careful understanding of these components.

The first task of the Transition IEP team is the development of a desired post-high school outcome statement with the student. A desired post-high school outcome statement is a vision for a student for projecting three to five years after the student graduates. The outcome statement is very important because it establishes the direction for the rest of the Transition IEP. Relevant annual goals and meaningful short term objectives are generated from a clear vision of where the student wants to live, work, and participate in the community (O'Leary & Paulson, 1991).

Transition IEP team members develop the desired post-high school outcome statement at the first IEP meeting that includes transition elements. Review and modification of the outcome statement occurs at subsequent Transition IEP meetings.

Outcome statements vary by student preference, need, interest, age, and ability. Initially, post-high school outcome statements may be very broad (e.g., college vs. employment). The outcome statement should become more focused in later Transition IEP meetings, however, as the student nears graduation (Baer et al., 1992).

Team members should consider desired post-high school outcomes in the following areas:

- \* Post-high school education
- \* Vocational training
- \* Integrated employment
- \* Continuing and adult education
- \* Adult services
- \* Independent living
- \* Community participation

Below are some examples of desired post-high school outcome statements for students at various stages in the transition process:

- \* Lee desires to be included in community activities (volunteer work and leisure) and to participate as best he can with life at home with his parents.
- \* Taylor desires to work in a daycare center, share an apartment with a friend, use community recreational facilities, and have a network of friends.

- \* Leslie desires to become a master carpenter, own her own woodworking business, buy her own home, and travel with friends.
- \* Drew desires to be a registered nurse working full-time, live in an apartment, have a family, and volunteer at the local fire department.
- \* Angie plans to pursue a postsecondary degree in an area of interest to her.

After the Transition IEP team establishes a general direction through the desired post-high school outcome statement, they need to summarize the student's long-term, post-high school outcome. All planning team members must have an accurate picture of the student's current capabilities and capacities including the students' interests and preferences (Sample et al., 1990). This information may come from the student's portfolio or file, as well as from the student, family, and agency members. The team develops a present level of performance statement.

Through the review process, the team begins to select priority goals for the coming year. The activity areas listed immediately below must be addressed through an annual goal(s) (unless no services are needed, in which case see the "No Services Statement" below).

- \* Instruction
- \* Community experience
- \* Employment/training
- \* Post-high school adult living.

If appropriate, the following activity areas should be addressed through annual goals:

- \* Daily living skills
- \* Functional vocational evaluation
- \* Any other relevant areas.

The entire team develops the annual goals, which are customized to suit the student's specific desired post-high school outcome statement and identified needs. The use of standardized annual goals is highly discouraged.

Short-term objectives are the specific skills, knowledge, and experiences needed to achieve the annual goals. To develop the objectives, team members determine if there is a

difference between what is (present levels of performance) and what should be (vision). The focus is then on identifying transition services that will help achieve the vision. Team members develop strategies to eliminate or reduce barriers, increase opportunities, and create programs or services to meet long-range goals (O'Leary & Paulson, 1991).

Three steps are involved in developing each short-term objective:

- \* Specify needed transition services
- \* Determine and specify responsibilities (person and agency responsible)
- \* Determine procedure, schedule, and criteria for evaluation.

If the IEP team members determine that a student does not need services in one or more of the activity areas, a statement explaining why no services are needed must be included on the IEP. The IEP team members review the "No Services Needed" statement annually. The following is a sample "No Services Needed" statement for the area of daily living skills:

The student does not need any transition services in the area of postsecondary adult living skills because she can function independently in this area.

Responsibility for tracking the progress of transition services rests with individual IEP teams. Transition services are a shared responsibility among school personnel, service providers, family, and student. It is especially important to include the student in this process as much as possible. By giving students the responsibility to accomplish specific short-term objectives, they are learning to be empowered and develop into adults who can take responsibility for their future (O'Leary & Paulson, 1991).

One way to document which person or agency is assuming responsibility to provide or pay for new transition services is for the student, family members, and agency representatives to sign page 3 of the Transition IEP. If any of these individuals are unable to attend the IEP meeting, team members may designate a contact person who is responsible for discussing the content of the IEP with the absent individual and obtaining his or her signature, agreeing to provide needed services on the Transition IEP.

Follow-up activities may need to occur after the Transition IEP meeting. A member of the Transition IEP team is assigned responsibility to coordinate the necessary follow-up activities

to ensure that they occur. Follow-up may be necessary when responsibility for specific transition services are assigned to the student, his parents, a member of the school or district staff, or an agency representative during a meeting at which they are not in attendance.

When the Transition IEP team determines that a student requires specific transition services that are available from a particular agency, and a representative of the agency is unable to attend the meeting, follow-up will be needed. The Transition IEP coordinator, or another assigned person, is responsible for contacting a representative of the agency to review the content of the IEP and discuss the needed services. This communication may occur through a meeting, telephone conference, or correspondence. The Transition IEP coordinator requests that an authorized representative of the agency show willingness for the agency to provide the needed services. If a representative of the agency indicates that the agency cannot commit to providing the transition service, it will be necessary for the Transition IEP team to reconvene to identify alternative strategies to meet the student's transition objectives. No revisions can be made to an IEP without reconvening an IEP meeting.



# An Agency Guide to Understanding Transition in New York: The IDEA Way

Section  
D

**The Transition Checklist**  
**and**  
**The Transition Timeline**



## Transition Checklist

The following is a checklist of transition activities to consider when preparing individual transition plans (ITP) with the IEP team. The student's skills and interests will determine which items on the checklist are relevant. Use this checklist as a guide for developing transition activities that should be included in the IEP. It can help identify who should be part of the ITP/IEP team. Responsibility for carrying out the specific activities should be determined at the ITP/IEP meetings.

Completed	Action	Suggested Age Range
	Administer initial vocational assessment	12
	Discuss the following curriculum at IEP meetings: Academic Social Language/communication Occupational Self-help skills Self-advocacy skills	12 - 15
	Develop and implement strategies to increase responsibilities and independence at home	12-15
	Complete periodic vocational evaluations	12-21
	Introduce and discuss transition services	11-12
	Notify parents that transition services will be incorporated into the IEP beginning at age 14, younger if necessary	12
	Assure that copies of work-related documents are available Social security card Birth certificate Obtain working papers (if appropriate)	13-15
	Obtain parental consent so that the appropriate adult agency representative can be in attendance	14-16
	Develop transition component of the IEP and annually thereafter	12
	Discuss adult transition with CSE	12-21
	Consider summer employment/volunteer experience	14-21
	Begin career exploration, job shadowing, and job exploration	14
	Explore leisure activities	12
	Consider the need for residential opportunities, including completing applications, as appropriate	14-21
	Obtain personal ID card	15
	Obtain driver's training and license	16-18
	Develop transportation and mobility strategies Independent travel skills training Public or paratransit transportation Need for travel attendant	16-21

	Investigate the need for SSDI/SSI/Medicaid programs	15-18
	Consider guardianship or emancipation	16-18
	Develop and update employment plans	14-21
	Involve VESID/CBVH, as appropriate, within 2 years of school exit	16-21
	Research possible adult living situation	15-21
	Investigate post-high school opportunities (further educational vocational training, college, military, etc.)	15-21
	Seek legal guardianship	17
	Apply for post-high school college and other training	16-21
	Male students to register for the draft (no exceptions)	18
	Register to vote	18
	Review health insurance coverage	18
	Complete transition to employment, further education or training, and community living, affirming arrangements are in place for the following Post-secondary / continuing education Employment Legal/advocacy Personal independence/residential Recreational/ leisure Medical/health Counseling Financial/income Transportation	16-21

### Family/Parent Checklist

- \* Plan and prepare for future financial, medical, and housing resources by
  - ◇ assisting with application for Social Security Disability (SSD) or Supplemental Security Income (SSI) benefits;
  - ◇ developing a will
  - ◇ determining guardianship
  - ◇ applying for financial aid for post-secondary education or training
- \* Assist the student to obtain key information documents: social security card, driver's license, non-driver ID card
- \* Help the student develop independent decision-making and communication skills
- \* Support positive self-esteem
- \* Reinforce work-related behaviors at home (grooming, etiquette, following directions)

- \* Provide opportunities for leisure time activities
- \* Use home-life opportunities to assist in teaching the student daily living skills (banking, shopping, cooking, cleaning, laundry)
- \* Promote good money management
- \* Work actively with the CSE to plan and monitor the effectiveness of the student's transition program.

#### Critical Questions to Ask School Districts

- \* Does every student with a disability who is 14 years of age or older have a statement of transition service needs on his or her IEP?
- \* Does every student with a disability who is 14 years of age and older have a statement of needed transition services on their IEP?
- \* Is every student with a disability, who is in need of post-high school support services and programs receiving them before they exit the public schools?

### **The Transition Timeline**

#### Four to Five Years before Leaving the School District

- \* Identify personal learning styles and the necessary accommodations to be a successful learner and worker.
- \* Identify career interests and skills, complete interest and career inventories, and identify additional education or training requirements.
- \* Explore options for post-secondary education and admission criteria.
- \* Identify interests and options for future living arrangements, including supports.
- \* Learn to communicate effectively your interests, preferences, and needs.
- \* Be able to explain your disability and the accommodations you need.
- \* Learn and practice informed decision-making skills.
- \* Investigate assistive/adaptive technology tools that can increase community involvement and employment opportunities.
- \* Broaden your experiences with community activities and expand your friendships.
- \* Pursue and use local transportation options outside of family.

- \* Investigate money management and identify necessary skills.
- \* Acquire identification card and the ability to communicate personal information.
- \* Identify and begin learning skills necessary for independent living.
- \* Learn and practice personal health care.

#### Two to Three Years before Leaving the School District

- \* Identify community support services and programs (Vocational Rehabilitation, County Services, Centers for Independent Living, etc.).
- \* Invite adult service providers, peers, and others to the ITP/IEP meeting.
- \* Match career interests and skills with vocational course work and community work experiences.
- \* Gather more information on post-secondary programs and the support services offered; and make arrangements for accommodations to take college entrance exams.
- \* Identify health care providers and become informed about sexuality and family planning issues.
- \* Determine the need for financial support (Supplemental Security Income, state financial supplemental programs, Medicare.)
- \* Learn and practice appropriate interpersonal communication and social skills for different settings (employment, school, recreation, etc.).
- \* Explore legal status with regards to decision-making prior to age of majority.
- \* Begin a resume and update it as needed.
- \* Practice independent living skills, e.g., budgeting, shopping, cooking, and housekeeping.
- \* Identify needed personal assistant services, and if appropriate, learn to direct and manage these services.

#### One Year before Leaving the School District

- \* Apply for financial support programs (Supplemental Security Income, Independent Living Services, Vocational Rehabilitation, and Personal Assistant Services).
- \* Identify the post-secondary school you plan to attend and arrange for accommodations.
- \* Practice effective communication by developing interview skills, asking for help, and identifying necessary accommodations at post-secondary and work environments.
- \* Specify desired job and obtain paid employment with supports as needed.

- \* Take responsibility for arriving on time to work, appointments, and social activities.
- \* Register to vote and for selective service (if male).

(Parent Brief, winter 1996, National Transition Network)



# An Agency Guide to Understanding Transition in New York: The IDEA Way

Section  
E

**Interagency Collaboration**



## **Rationale and Overview of the Need for Interagency Councils**

Personnel from local school districts and service agencies are responsible for developing attitudes and beliefs and creating an environment conducive to teaching and learning. IDEA has few specific administrative requirements; however, without support, involvement, and understanding of school and agency personnel, neither the letter nor spirit of the regulations can be accomplished. This section addresses the necessary leadership in creating a supportive climate for the provision of transition services and issues related to school policy and day-to-day decisions related to transition services.

Administration support is essential for the formation of successful transition services. Active, involved, and enthusiastic leadership is necessary to effectively guide the transition process and encourage change when necessary. Support appears in a variety of ways.

- \* The early stages of transition planning require active involvement of personnel, including the superintendent, administrator of exceptional student education, program supervisor, building principal, transition specialist, agency administrators, and agency personnel.
- \* The lead administrator develops written objectives for gaining and maintaining support of other personnel, families, school board members, and agency representatives.
- \* The results of needs assessments and follow-up studies are shared to document a need for program changes and to provide a basis for the development of new services.
- \* School district representatives design evaluation strategies to let stakeholders and agencies know what services are working to meet the needs of the students.
- \* Personnel affect the school climate by the formal and informal ways they:
  - Make decisions
  - Express expectations and attitudes
  - Develop and use channels of communication
  - Emphasize the importance of shared responsibility for long-term outcomes for students with disabilities

Effective leaders of transition activities and services emphasize pulling together the talents of team members into a unified effort to solve the unique problems of community-based programming (Nietupski, Hamre-Nietupski, Donder, Houselog, & Anderson, 1988). School personnel influence the school climate and demonstrate commitment to specific programs

through assessment and curriculum decisions, performance evaluation and reward system criteria, and interactions with students, families, and agencies. In addition, agency and school personnel can influence perceptions by supporting community labs as community-based training sites and providing release time for consultations with other school personnel, family members, adult service providers, and community representatives.

To determine commitment to transition services, the following questions may be asked:

- \* Who is involved in making decisions about the district or school transition services?  
Transition services should be coordinated among the school, family, adult service providers, and community representatives. All these stakeholders share equally in the responsibility for achieving positive, individual student outcomes. Formation of an interagency transition planning team or discussion of transition services by the school advisory council can encourage increased participation in the process.
- \* What are the elements of effective support for transition services?  
Support for transition services includes adequate funding, flexible scheduling, and promotion for a specific service. Staff attendance at professional meetings, workshops, or visits with other schools, agencies, or programs and making professional literature available are additional ways to show support for transition services. Personnel training and in-service activities should emphasize a transdisciplinary approach. Recognition, articles in newsletters or local newspapers, and presentation of service accomplishments at conferences increase pride and ownership in services (Nietupski et al., 1988). Soliciting staff input into service planning will demonstrate the value of the staffs' opinions and will encourage staff to become involved in the planning process.
- \* What resources are available to support transition services?  
No one person is knowledgeable about all resources in a school, district, or community.

The development of a comprehensive list or matrix of resources and services by the transition planning team will increase knowledge of what is available. This information can then

be available to teachers, families, and IEP teams to support their planning efforts. Individual counties are encouraged to develop their own matrices.

Policy decisions of school and district administrators have a direct relationship on the climate established for transition services. Major policy changes may be required to involve all students with disabilities in transition services that are referenced to the community. Families, students, agency representatives, educators, administrators, and business representatives should be involved in the planning and provision of transition services. Barriers to transition services may originate from both the school and the community. Issues not previously encountered on a large scale may become part of day-to-day decision-making.

Specific areas in which changes can be anticipated include:

- \* student involvement
- \* family involvement
- \* funding
- \* transportation
- \* staff scheduling
- \* liability
- \* program evaluation

Unfortunately, there are no easy answers to many of the issues that will be raised in these areas. Problems can be averted and barriers turned into opportunities by personnel who are aware of potential problem areas, which approach barriers in a problem-solving manner, and who support long-term planning to find creative solutions.

School and agency personnel can begin to increase student involvement in transition planning by evaluating the extent to which students currently participate in the IEP process. This assessment would reinforce the commitment to including students in planning for their future. It would also provide a baseline measure of student participation and guide strategies to increase student understanding of, and involvement in, the process.

The success of transition planning depends on the effectiveness with which students and their families are able to plan for and achieve the students' desires for the future. Families are an integral part of this process. They should actively participate in all phases of transition planning (Bates, Bronkema, Ames, & Hess, 1992). School and agency personnel need to encourage

families to discuss and plan for their child's future (Nietupski et al., 1988). Personnel foster family participation on two different levels: transition planning for individuals and planning for school-wide transitioning services. On the first level, school and agency personnel have a responsibility to

- \* involve families as members of the Transition IEP team
- \* make family members aware of transition planning
- \* provide information on career and vocational opportunities and options
- \* help families understand and negotiate the maze of adult services they may confront
- \* help families become effective advocates and case managers for their child.

While the involvement of parents or guardians occurs throughout the student's school experience, their involvement in the transition planning process increases as the student enters high school. Discussions with the family begin to focus on desired post-high school outcomes. Family involvement in transition planning for individual students can be increased by providing

- \* parent handbooks, informational letters, or workshops specifically designed to relay information about transition services
- \* assistance to family support groups
- \* Transition IEP meetings scheduled at convenient times and locations
- \* mechanisms for families to be involved in preplanning for the IEP meeting
- \* information on resources and services available to students
- \* support for parents to train and network with other parents

At the second level of involvement, family members are included as partners in planning and carrying out district and school-wide transition services. The inclusion of family members on interagency transition planning teams and school advisory councils recognizes family members as important sources of development information. Family input into the transition planning process can ground decisions and encourages future family support.

Taking the following steps can encourage family involvement in school or interagency transition planning:

- \* Ask family members to serve on interagency community transition planning teams and ensure that parents who serve on planning teams have meaningful roles in the process and are viewed as partners.
- \* Be open to new ideas or strategies suggested by family members.
- \* Establish systematic means of communicating with family members.
- \* Educate family members on their role in the implementation of IEP annual goals and short-term objectives.
- \* Invite family members to attend meetings to hear information about services from a variety of community agencies.
- \* Ask how the school can help with family support groups.
- \* Volunteer to present information about the school's transition services to groups to which family members belong.
- \* Solicit family members' help in informing other families about transition services.
- \* Ask for family members' help with the transition services.
- \* Invite family members to become involved with community-based instruction.
- \* Encourage family members to visit vocational-technical centers and community colleges. (Adapted from Boyer-Stephens, pp. 175-176).

Administrators demonstrate support for transition services through their budgeting decisions. They need knowledge of funding formulas as well as an understanding of how funding policies affect program implementation. New budgets may be needed for functional, community-referenced, and community-based educational experiences. Donations from local businesses, including supermarkets and restaurants, services and donations from business partners, and contributions from civic and advocacy groups may be solicited. Parents can provide money for students to shop for their own clothes and food as part of curriculum-based instruction. Creative solutions to funding problems will require an understanding of:

- \* The broad areas of agencies and organizations providing services and supports to students and adults with disabilities
- \* Funding resources available from the U.S. Office of Special Education Programs and other Federal Programs

- \* Grants available through private agencies and advocacy groups that can help supplement existing school budgets
- \* Current information on state and federal requirements for funding new programs and providing ongoing supports (i.e., through VESID)
- \* Eligibility requirements for various programs that provide funding for transition and related services
- \* Wage and hour laws.

When new monies are not available, interagency agreements can assist school personnel to coordinate their efforts and resources more efficiently. Empowering both families and students to find creative ways to meet their needs (which should be a goal of transition services) can help reduce the need for increased funding sources. State and university technical assistance can help a school or district identify best practices and more efficiently use its resources (Bates et al., 1992). A team model in which members provide physical therapy, occupational therapy, or speech or language therapy in integrated classroom or community settings can increase available staff for community instruction without increased costs (Nietupski et al., 1988).

Community-based transition services require increased attention to transportation issues. School and agency personnel need to investigate flexible schedules, additional costs, and liability issues related to transporting students. The school may need additional liability insurance when district-owned automobiles are used to transport students (Nietupski et al., 1988). Advanced planning through an approved written procedure covering transportation issues will assist in solving problems before they arise. To increase smooth operation and decrease liability, personnel are urged to:

- \* Consult with transportation staff prior to or during the IEP process when planning for community-based instruction
- \* Ensure transportation records are accurate and current (i.e., schedules, accident, and incident reports)
- \* Provide transportation personnel with appropriate training
- \* Ensure that school personnel take proper precautions when transporting students who are technology dependent, exhibit aggressive or dangerous behavior, or have uncontrolled seizures
- \* Ensure that adequate liability insurance is available. (Adapted from Linder, 1991).

The use of nontraditional schedules helps coordinate activities between the school and community providers and provides training in real-world, nonschool settings. Additionally, these transition personnel may need increased flexibility and autonomy in their schedules. The small-group nature of community-based assessment and training requires adjusted student-staff ratios. These individuals need assistance to:

- \* Schedule and follow up Transition IEP team meetings (including reconvening the IEP team when necessary)
- \* Develop and monitor instructional programs
- \* Work with community and adult service providers
- \* Develop new training sites and job placements
- \* Schedule and coordinate transportation.

As transition services change the delivery of secondary special education, the definition of classroom must expand beyond the physical structure of the school building to include the entire community. Personnel capabilities must also expand (DeStefano & Wermuth, 1992). Adjusted student-staff ratios and community experiences that are unavailable during the typical school day require additional paraprofessional assistance and alternative schedules. Alternative scheduling solutions may involve gradually phasing students into a program. Members of parent groups, community members, or students without disabilities may volunteer their services (Nietupski et al., 1988). Additional personnel may be required in this process and include job coaches, personal care attendants, job developers, family liaisons, social workers, health care professionals, and case managers (DeStefano & Wermuth, 1992).

Comprehensive program evaluation helps school and agency personnel fulfill the goals of the transition planning by ensuring effective and efficient use of resources. Initial needs assessment information and follow-up evaluative data can alert personnel of the need to create new programs or determine if the resources should go to existing programs (Hasazi, Hock, & Cravedi-Chang, 1992). Using initial needs assessment information; school and agency administrators can identify required services and develop strategies to meet the current needs of both the school and community. Failure to collect and use information regarding desired post-high school outcomes and the need for transition services will decrease the ability to respond proactively and effectively to the transition needs of the school and individual students.

The appointment of an interagency community transition planning council or team is an important step in facilitating interagency linkages. Composition and specific duties of a community's transition planning team will vary. However, the need for collaboration, sophisticated leadership, and working relationships based on mutual respect and cooperation is common to all teams.

Therefore, because no single agency has all of the necessary resources to adequately meet the needs of individuals with disabilities, it requires an interagency cooperation to provide a full continuum of services. Since people with disabilities encounter differing problems and family situations, a wide variety of programs and services must be available. Establishing a comprehensive array of programs and services is not an easy task and requires the coordination of a variety of community agencies.

The effectiveness of an interagency council is directly related to their ability to work together as a team. Idol, Paolucci-Whitcomb, & Nevin (1989) defined collaboration as a style of interaction between co-equal parties voluntarily engaged in shared decision making as they work toward a common goal. Friend and Cook (1996) defined collaboration as the general term that is used to describe a particular type of working relationship among professionals, one characterized by a shared goal, voluntaries, parity, shared responsibility for decision making, shared accountability for outcomes, shared resources and the emergence of trust respect and a sense of community. Larson and La Fasto (1989) identified eight characteristics of effective teaming. These characteristics are (a) a clear, elevating goal, (b) a result-driven structure, (c) competent members, (d) unified commitment, (e) a collaborative climate, (f) standards of excellence, (g) external support and recognition, and (h) principled leadership.

**Purpose of the Interagency Council: agency point of view**

- \* Identify children, youth, and young adults in transition
- \* Establish better connections with families, including advocates as well as links between and among families and agencies
- \* Reduce duplication and overlap of services
- \* Ensure agency presence and participation in Council and school district meetings (seen as a problem)

**Purpose of Interagency Council: chair's point of view**

- \* Create awareness of what's out there to serve the student's needs
- \* Improve coordination of services (seems piecemeal at this point)
- \* Educate CSE chairs to process, point of entry, how to access services, etc.
- \* Establish a waiting list, what is it?
- \* Improve parental awareness of services
- \* Initiate problem-solving dialogue
- \* Help educate agencies as to the future needs and demands of their future clients

The Individuals with Disabilities Education Act (PL 101-476) clearly explains agency responsibility in the transition process. IDEA, Section 300.347, includes accountability for transition service provision:

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

Nothing in this part relieves any participating agency, including a state vocational rehabilitation agency, of the responsibility to provide or pay for any transition services that the agency would otherwise provide to the student with disabilities that meets the eligibility criteria for that agency.

### **Formation of Interagency Collaboration / Transition Councils**

Interagency collaboration, coordination, and cooperation have been long-term goals of professionals concerned with effectively meeting the needs of people with disabilities. Because no single agency has all of the necessary resources to adequately meet the needs of individuals with disabilities, it is only through a concerted effort of interagency collaboration, coordination, and cooperation that a full continuum of services can be ensured. Educational, vocational and other community services should be coordinated in order to accomplish a smooth transition to gainful employment, thus maximizing employment potential and enhancing overall quality of life.

Interagency linkages should include a written commitment from team members through the signing of interagency agreements. Interagency agreements provide formal documentation of

interagency working relationships. IDEA recognizes the importance of including interagency agreements in State plans (34 CFR 300.152) and also provides a framework for local interagency agreements that

- \* Describe the role of each agency in providing services
- \* Define the financial responsibility of each agency
- \* Establish procedures for resolving disputes among agencies
- \* Establish procedures under which school districts may initiate proceedings to secure reimbursement from agencies that are parties to the agreement or otherwise implement the agreement.

Participation on the team by students, parents, agency personnel (including representatives of post-high school education), business and industry personnel, and community members will increase their ownership in the process and help solidify services. The resulting open communication will assist in reducing territorial conflicts. Strong leadership by team members is needed to initiate meetings, maintain open channels of communication, provide technical assistance, resolve problems that arise, and educate others on the purpose of transition services. To build an effective community transition planning team, several considerations are offered in this section:

- \* Team composition
- \* Team philosophy, goals, and objectives
- \* Understanding of members' roles and responsibilities
- \* Process of collaboration.

#### Team composition:

Composition of the planning team may vary by school district and community size or location, but should include representatives of all stakeholders in the transition planning process. It is important to include people who have access to information along with people who have decision-making authority over policies, procedures, and allocation of personnel and financial resources. To implement interagency team agreements, a community team may want to include a second tier of team members assigned to various work groups. Potential team members include:

- \* Students

- \* Parents or family members
- \* School board members
- \* District level staff
  - exceptional student education administrators and supervisors
  - curriculum coordinators
  - transition specialists
  - guidance coordinators
  - related service representatives
  - coordinators of at-risk programs
  - vocational educator directors or supervisors
  - adult education coordinators
- \* School-level staff
  - principals
  - exceptional student education teachers
  - vocational education teachers
  - general education teachers
  - occupational specialists
  - guidance counselors
- \* School improvement team or school advisory committee members
- \* Agency representatives
  - Vocational Rehabilitation
  - Health and Rehabilitative Services
  - Developmental Services
  - Children and Family Services
  - Alcohol, Drug Abuse and Mental Health Services
  - Juvenile Justice Program
  - Division of Blind Services
- \* Community service representatives
  - transportation providers
  - community vocational providers
  - employment agencies

- rehabilitation facilities
- advocacy agencies
- civic clubs
- \* Business and industry representatives
  - local businesses
  - personnel offices
  - labor organizations
- \* Post-school education representatives
  - universities
  - community colleges
  - vocational-technical centers

Team Philosophy, Goals and Objectives:

Establishment of a team philosophy and mission statement (For example: "The purpose or mission of the Livingston County Interagency Collaboration / Transition council is to provide a flow of communication among agencies and schools so that they can work together to provide a continuum of services to insure that the individuals with disabilities will make successful transitions into adult community situations by acquiring meaningful employment, establishing residential living, and developing social relationships."), and goals and objectives for accomplishing that mission will enhance effectiveness of an interagency community transition team. Through interagency linkages, a philosophy of creating and delivering services based on individual needs, rather than fitting students into existing programs, should be emphasized. In developing a team philosophy, it is important to remember that schools alone cannot provide everything a student needs for adulthood. The family, the community, adult service agencies, and the students themselves must share responsibility for and become involved in the process. The transition process is a community effort, and the team's mission should reflect this. New alliances, blended funding, resource consolidation, non-duplication of services, innovative service delivery, and coordinated agency network can all result from effective collaborative efforts. Collaboration in the transition process helps:

- \* Provide creative programming while the student is still in school

- \* Ensure a smooth transition when the student leaves school to enter the world of work, post-high school education, or training, and community participation.
- \* Access the necessary continued supports once the student leaves school.

### Understanding of Member's Roles and Responsibilities:

As students leave school, they encounter various adult service providers, all with different services and eligibility requirements. Community transition planning teams should take the lead role in coordinating efforts and clarifying roles to ensure that the service focus remains on the needs and interests of the individual student while most effectively using available resources and meeting the needs of the community. Two primary objectives of a community transition planning team are the assessment of school district and community needs and the development of a resource list or matrix of available services.

Design and implementation of a community transition system with appropriate program evaluation criteria should be based on an initial assessment of school and community needs. The needs assessment provides information on the effectiveness of the current system in helping achieve desired student outcomes, involvement of key players in the transition planning process, and the need for outreach, staff development, and training activities. Several questions help to assess the transition needs of a community.

- \* What are the needs of students with disabilities in the school district?
- \* How do transition needs relate to school improvement plans?
- \* What agencies are currently available to fill those needs?
- \* What needs are currently not met?
- \* What interagency agreements already exist?
- \* What interagency councils and committees already exist?
- \* What gaps in services can be identified?

A community transition planning team should facilitate the development of a resource list or matrix of available services. Knowledge of resources and services are available through team members collectively that may not be known to any one team member individually. Development of a matrix of services identifying agencies or community providers will help administrators, teachers, and families know where to turn when exploring ways to meet student needs and interests. The service matrix will also help administrators and the community transition planning team identify service gaps and overlaps and assist in effective long term planning. This service matrix will be helpful to school district personnel and family members for IEP planning as well and should be available during the Transition IEP meeting.

An interagency community transition planning team facilitates increased coordination between the school or school district and other service providers. Each team member shares responsibility for mutually beneficial outcomes. Both individual and group responsibilities exist to:

- \* Develop cohesive transition service system
- \* Share resources and strategies to reduce duplication of efforts and service gaps
- \* Coordinate funding sources in relation to service delivery
- \* Provide networking opportunities
- \* Develop working relationships between the school system and adult service agencies, business, community, parents, and students through increased communication and coordination
- \* Provide for shared ownership of the transition process
- \* Serve as a sounding board for policies, procedures, and innovative ideas regarding vocational programs and other related activities
- \* Identify multiple exit points in the curriculum with the help of the business community
- \* Gather and interpret data on student occupational needs and labor market needs
- \* Ensure that small adult service agencies are given a voice in transition planning process
- \* Develop a working partnership with a common goal (Adapted from Bruyere & Zona, 1992).

These roles and responsibilities may serve as a basis for setting team objectives.

#### Process of Collaboration:

While interagency collaboration is mandated by IDEA, a collaborative spirit does not "just happen" with the establishment of an interagency team or the writing of an interagency agreement. Effective interagency collaborative efforts are based on the belief that opportunities to achieve desired post-high school outcomes is a shared responsibility that extends beyond the school system. True collaboration requires a commitment by all partners to work toward desired outcomes through a structured group process.

Collaboration cannot be forced. All partners in the process must view it as necessary in order for the process to be successful. The team leader must be competent in the technical aspects of group problem solving. Cross-agency training, shared resources (facilities, funding, or staff), sensitive leadership, open communication, and the resolution of conflicts as they arise are necessary to develop joint ownership and a belief in the team goals. Responsibility for the team process can be rotated among the team members. An important result of collaboration is the shared feeling that one is not alone in assisting students with disabilities in achieving their goals.

The process of effective collaboration requires

- \* Establishing members' roles and responsibilities
- \* Developing a common mission statement
- \* Developing team goals
- \* Identifying training needs of the group
- \* Evaluating the group process as well as the group outcomes
- \* Identifying the supports for barriers to the group process

For teams to reach their potential, regularly scheduled meetings should be held. To most effectively use the group process, time should not be spent solely on information dissemination. The team facilitator should encourage group sharing and problem solving. Implications of possible solutions to problems should be discussed.

Levels of trust will change as different levels of group developments are reached. These have been classified as

- \* Collaboration- an orientation; focusing on formal group structure and personnel limitations, insecurities, and isolation; sharing information but not resources; superficial sharing of selves but hesitancy in making commitments
- \* Coordination- redefining problems in terms of programs (and not individual students); group's stability increased; commitment of resources; conflicts, differences, and current constraints identified
- \* Collaboration- consolidation; trust, cohesion, and development of informal networks and systems built on common resources; resolutions reached based on common goals (Bureau of Student Services and Exceptional Education, 1990).

Communication is essential for effective group functioning. Open two-way communication helps insure that conflicts will be brought out and resolved in order to increase

team effectiveness. Potential confrontation should be transformed into an opportunity to provide feedback and share information.

When problems arise, focusing on personality differences rather than the problem can impede communication and prevent development of open, trusting relationships. Suggestions for separating the problem from the person are:

- \* Seeing the situation from the other person's perspective
- \* Understanding the other person's point of view and trying to understand the emotional force with which he or she believes in it
- \* Learning not to presume the other person's intentions from your fears
- \* Avoiding blaming the other person for the problem
- \* Looking for opportunities to dispel stereotypes
- \* Giving the other person a stake in the outcome by making sure he or she participates in the process
- \* Accepting the task as a shared problem and facing it jointly (Adapted from Bruyere & Zona, 1992).

The facilitator needs to be aware of the process of group development and be alert for additional barriers to the process. Barriers include:

- \* Competition among individuals for influence, status, control, power, and resources
- \* Failure to share information
- \* Protection of one's territory: "turfism"
- \* Lack of coordination of services
- \* Inconsistent application of interventions based on individual interpretation of needs
- \* Interpersonal conflicts; hurt feelings or misunderstandings that are not discussed or resolved.

Collaborative team efforts have the advantage that members bring differing strengths from diverse backgrounds to solve problems of mutual concern. For the group to move forward and successfully reach its objective, all members must be aware of the process of group functioning and work to overcome barriers to the process. A checklist of steps to assist in developing a community transition planning team is included in the Appendices.

# An Agency Guide to Understanding Transition in New York: The IDEA Way

Section  
F

**Laws and Regulations**  
**and**  
**Questions about IDEA '97**



This section provides an overview of transition services mandated by the Individuals with Disabilities Education Act (IDEA) and Individuals with Disabilities Education Act Amendments '97 (IDEA '97). Legislation related to transition is identified and discussed.

### **What Does the Law Say About Transition?**

#### **IDEA - The Individuals with Disabilities Education Act (PL 101-476)**

IDEA mandated for the first time that IEPs of all students with disabilities have transition-related services and goals by the time students are 16 years old (changed to age 14 by IDEA '97). The following language is taken directly from the final regulations regarding the implementation of IDEA:

(a) ... A coordinated set of activities for a student designed within an outcome-oriented process that promotes movement from school to post-secondary activities, including postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation. (b) The coordinated set of activities described in paragraph (a) of this section - must (1) be based upon the individual student's needs, taking into account the student's preferences and interests; and (2) include needed activities in the areas of - (i) instruction; (ii) community experiences; (iii) the development of employment and other postschool adult living objectives; and (iv) if appropriate, the acquisition of daily living skills and functional vocational evaluation (34 CFR §300.18).

The Individual Education Plan (IEP) for each student, beginning no later than age 16 (and at a younger age, if determined appropriate), must include a statement of needed transition services as defined in §300.18, including, if appropriate, a statement of each public agency's responsibilities or linkages, or both, before the student leaves the school setting. If the IEP team determines that services are not needed in one or more areas specified in §300.18(b)(2)(i) through (b)(2)(iii), the IEP must include a statement to that effect and the basis upon which the determination was made. (§300.346)

In terms of transition assessment, it is important to note that activities must be based on the individual student's needs, taking into account the student's preferences and interests, and include:

- \* Instruction
- \* Community experiences
- \* Development of employment and other post-high school adult living objectives
- \* Acquisition of daily living and functional vocational evaluation

IDEA also stipulates that secondary special educators are responsible for inviting students and their families to their IEP meetings when transition goals are discussed and for inviting personnel from other agencies to ensure that transition services are coordinated. Thus, IDEA reinforces self-determination and choice for students with disabilities to the greatest extent possible.

If the purpose of the meeting is the consideration of transition services for a student, the public agency shall invite:

- \* The student
- \* A representative of any other agency that is likely to be responsible for providing or paying for transition services.

If the student does not attend, the public agency shall take other steps to ensure that the student's preferences and interests are considered; and if an agency invited to send a representative to a meeting does not do so, the public agency shall take other steps to obtain the participation of the other agency in the planning of any transition services.

Transition Services are Defined by IDEA (PL 101-476) and updated in IDEA '97 (PL 105-17):

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

- \* (b) The coordinated set of activities described in paragraph (a) of this section must be - (1) be based on the individual student's needs, taking into account the student's preferences and interests; and (2) include needed activities in the areas of - (I) instruction, (ii) related services\*, (iii) community experiences, (iv) the development of employment, and other post-high school adult living objectives, and when appropriate, (v) acquisition of daily living skills, and (vi) functional vocational evaluation. (\*added with the passage of PL 105-17)

### **IEP Requirements**

Components of IEPs for students with disabilities that were required previously are still in effect. These components have been expanded for the transition portion of the IEP. Below is a listing of requirements for all IEPs and the new transition related requirements.

The IEP must include:

- \* The student's present levels of educational performance
- \* Annual goals
- \* Short-term objectives
- \* The specific special education and related services to be provided
- \* The extent of participation in regular education programs
- \* Date of the initiation of services and the anticipated duration of the services
- \* Appropriate objective criteria, evaluation, procedures, and schedules for determining whether the short-term instructional objectives are being met.
- \* The disability classification
- \* The program of study

The transition portion of the IEP must include a statement of

- \* Needed transition services
- \* If appropriate, each public agency's and each participating agency's responsibilities and/or linkages before the student leaves the school setting (34 CFR 300.346).

IDEA requires that the IEP must be outcome-oriented. To maintain focus on achieving positive outcomes in post-school adult living for each student, a statement of the desired post-high school outcomes should be included in the transition portion of the IEP.

Areas to be considered in developing this statement may include, but are not limited to:

- \* Post-secondary education
- \* Vocational training
- \* Integrated employment (including supported employment)
- \* Continuing and adult education
- \* Linkages with adult services
- \* Independent living
- \* Community participation.

The IEP team must determine needed transition services based on the student's needs, interests, and preferences in the areas of

- \* Instruction
- \* Community experiences
- \* The development of employment
- \* Other postschool adult living objectives
- \* If appropriate, acquisition of daily living skills and functional vocational evaluation (34 CFR 300.18).

These activities are addressed through annual goals and short-term objectives on the IEP. Through these goals and short-term objectives, supports, services, and skill-building activities are planned.

If the IEP team determines that services are not needed in any one or more of these areas, a statement that the service is not needed and the basis the IEP team used for making this determination must be included. Since transition services are part of the IEP, the need for service in each activity area must be reviewed annually (34 CFR 300.346).

## **Participants in the IEP Process**

The IEP team membership is expanded under IDEA for the transition portion of the IEPs. Transition planning requires coordination among families, students, communities, schools, agencies, and businesses. The expansion of the IEP transition team membership reflects the partnership needed for this coordination.

Participants who shall be present at every IEP meeting are the:

- \* Student's teacher
- \* Local education agency representative
- \* Parent(s) or legal guardian(s)
- \* Student
- \* Representative of any other agency likely to be responsible for providing or paying for transition services (34 CFR 300.344).
- \* Others at the discretion of the parent(s), guardian(s), or the school district.

IDEA has requirements to ensure that IEP team members unable to attend the meeting have the opportunity to provide information pertinent to program planning. Two requirements highlight this responsibility.

- \* If the student does not attend, the school district shall take other steps to ensure that the student's preferences and interests are considered.
- \* If an agency invited to send a representative to a meeting does not do so, the school district shall take other steps (i.e., interagency agreements, individual correspondence, phone calls, etc.) to obtain participation of the other agency in planning of any transition services (34 CFR 300.344).

## **Agency Responsibilities**

Under IDEA, the content of the IEP must include a statement of needed transition services and, if appropriate, participating agencies' responsibilities and linkages (34 CFR 300.344(b)). Additionally, nothing in the law relieves any participating agency of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet eligibility criteria of the agency (34 CFR 300.347).

If a state or local agency fails to provide agreed-upon transition services included in the student's transition portion of the IEP, the school district shall initiate a meeting to identify alternative strategies to meet the transition objectives and, if necessary, revise the student's IEP. No specific timelines are given for reconvening the IEP team; however, the guidelines of IDEA indicate this meeting should be initiated "as soon as possible" after an agency fails to provide an agreed-upon service (34 CFR 300.347 (a)).

Reconvening the IEP team when alternative strategies are called for ensures that needed services are provided and students are not left without resources for assistance. For example, alternative strategies would be needed when

- \* A private provider under contract with an agency that was to provide employment services to a student is no longer able to provide these services due to financial cutbacks or staff reductions.
- \* An agency that was to provide vocational evaluation places the student on a long waiting list.

### **Agency Linkages**

Neither schools, adult service providers, state agencies, nor post-high school institutions can carry the entire responsibility for transition services. Agency linkages can encourage shared responsibilities for planning, program provision, and financial support for needed services among schools and participating state and local agencies. Interagency agreements are discussed in IDEA as they pertain to state-level interagency agreements that coordinate all programming for individuals with disabilities. Local transition interagency agreements should be modeled on and coordinated with state and interagency agreements.

IDEA requires each state to formulate policies and procedures for developing and implementing interagency agreements which

- \* Describe the role that each agency plays in providing or paying for services required under this part for students with disabilities
- \* Provide for the development and implementation of interagency agreements that define the financial responsibility of each agency for providing children with disabilities with a free appropriate public education (FAPE)
- \* Establish procedures for resolving interagency disputes among the agencies that are

parties to the agreements

- \* Establish procedures under which local education agencies (LEAs) may initiate proceedings in order to secure reimbursement from agencies that are parties to the agreements or otherwise implement the provisions of the agreements (34 CFR 300.152).

## **Common questions and answers about IDEA '97**

### **How are parents involved?**

The Congressional Committee Reports on the IDEA Amendments of 1997 express the view that the Amendments (see appendix) provide an opportunity for strengthening the role of parents and emphasize that one of the purposes of the Amendments is to expand opportunities for parents and key public agency staff (e.g., special education, related services, regular education, and early intervention service providers, and other personnel) to work in new partnerships at both the State and local levels (H. Rep. 105-95, p. 82 (1997); S. Rep. No. 105-17, p. 4 and 5 (1997)).

Accordingly, the IDEA Amendments of 1997 require that parents have an opportunity to participate in meetings with respect to the identification, evaluation, and educational placement of the child and the provision of FAPE to the child. (§300.501(a)(2)). Thus, parents must now be part of: (1) the group that determines what additional data are needed as part of an evaluation of their child (§300.533(a)(1)); (2) the team that determines their child's eligibility (§300.534(a)(1)); and (3) the group that makes decisions on the educational placement of their child (§300.501(c)).

The IDEA Amendments of 1997 also contain provisions that greatly strengthen the involvement of students with disabilities in decisions regarding their own futures, to facilitate movement from school to post-high school activities. For example, those amendments (1) retained, essentially verbatim, the "transition services" requirements from the IDEA Amendments of 1990 (which provide that a statement of needed transition services must be in the IEP of each student with a disability, beginning no later than age 16); and (2) significantly

expanded those provisions by adding a new annual requirement for the IEP to include "transition planning" activities for students beginning at age 14. (See the Appendix B for a description of the transition services requirements and definition).

With respect to student involvement in decisions regarding transition services, §300.344(b) provides that (1) "the public agency shall invite a student with a disability of any age to attend his or her IEP meeting if a purpose of the meeting will be the consideration of (I) The student's transition services needs under §300.347(b)(1); or (ii) The needed transition services for the student under §300.347(b)(2); or (iii) Both;" and (2) "If the student does not attend the IEP meeting, the public agency shall take other steps to ensure that the student's preferences and interests are considered." (§300.344(b)(2)).

The IDEA Amendments of 1997 also give states the authority to elect to transfer the rights accorded to parents under Part B to each student with a disability upon reaching the age of majority under state law (if the student has not been determined incompetent under state law) (§300.517). (Part B requires that if the rights transfer to the student, the public agency must provide any notice required under Part B to both the student and the parents.) If the state elects to provide for the transfer of rights from the parents to the student at the age of majority, the IEP must, beginning at least one year before a student reaches the age of majority under state law, include a statement that the student has been informed of any rights that will transfer to him or her upon reaching the age of majority. (§300.347(c)).

### **What are the Part B requirements regarding the participation of a student (child) with a disability in an IEP meeting?**

If a purpose of an IEP meeting for a student with a disability will be the consideration of the student's transition services needs or needed transition services under §300.347(b)(1) or (2), or both, the public agency must invite the student and, as part of the notification to the parents of the IEP meeting, inform the parents that the agency will invite the student to the IEP meeting.

If the student does not attend, the public agency must take other steps to ensure that the student's preferences and interests are considered. (See §300.344(b)).

Section §300.517 permits, but does not require, states to transfer procedural rights under Part B from the parents to students with disabilities who reach the age of majority under state law, if they have not been determined to be incompetent under state law. If those rights are to be transferred from the parents to the student, the public agency would be required to ensure that the student has the right to participate in IEP meetings set forth for parents in §300.345. However, at the discretion of the student or the public agency, the parents may also attend IEP meetings as "... individuals who have knowledge or special expertise regarding the child ..." (see §300.344(a)(6)).

In other circumstances, a child with a disability may attend "if appropriate." (§300.344(a)(7)). Generally, a child with a disability should attend the IEP meeting if the parent decides that it is appropriate for the child to do so. If possible, the agency and parents should discuss the appropriateness of the child's participation before a decision is made, in order to help the parents determine whether or not the child's attendance would be (1) helpful in developing the IEP or (2) directly beneficial to the child or both. The agency should inform the parents before each IEP meeting-as part of notification under §300.345(a)(1)-that they may invite their child to participate.

### **Must the public agency inform the parents of who will be at the IEP meeting?**

Yes. In notifying parents about the meeting, the agency "must indicate the purpose, time, and location of the meeting, and who will be in attendance." (§300.345(b), italics added.) In addition, if a purpose of the IEP meeting will be the consideration of a student's transition services needs or needed transition services under §300.347(b)(1) or (2) or both, the notice must also inform the parents that the agency is inviting the student and identify any other agency that will be invited to send a representative.

The public agency also must inform the parents of the right of the parents and the agency to invite other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate to be members of the IEP team (§300.345(b)(1)(ii)).

It may also be appropriate for the agency to ask the parents to inform the agency of any individuals the parents will be bringing to the meeting. Parents are encouraged to let the agency know whom they intend to bring. Such cooperation can facilitate arrangements for the meeting and help ensure a productive, child-centered meeting.

### **What does "Preparing Students With Disabilities for Employment and Other Post-School Experiences" mean and what is the purpose?**

One of the primary purposes of the IDEA is to "... ensure that all children with disabilities have available to them a free appropriate public education that emphasizes special education and related services designed to meet their unique needs and prepare them for employment and independent living..." (§300.1(a)). Section 701 of the Rehabilitation Act of 1973 describes the philosophy of independent living as including a philosophy of consumer control, peer support, self-help, self-determination, equal access, and individual and system advocacy, in order to maximize the leadership, empowerment, independence, and productivity of individuals with disabilities and the integration and full inclusion of individuals with disabilities into the mainstream of American society. Because many students receiving services under IDEA will also receive services under the Rehabilitation Act, it is important, in planning for their future, to consider the impact of both statutes.

Similarly, one of the key purposes of the IDEA Amendments of 1997 was to "promote improved educational results for children with disabilities through early intervention, preschool, and educational experiences that prepare them for later educational challenges and employment" (H. Rep. No. 105-95, p. 82 (1997); S. Rep. No. 105-17, p. 4 (1997)).

Thus, throughout their preschool, elementary, and secondary education, the IEPs for children with disabilities must, to the extent appropriate for each individual child, focus on providing instruction and experiences that enable the child to prepare himself or herself for later educational experiences and for post-high school activities, including formal education, employment, and/ or independent living. Many students with disabilities will obtain services through state vocational rehabilitation programs to ensure that their educational goals are effectively implemented in post-high school activities. Services available through rehabilitation programs are consistent with the underlying purpose of IDEA.

Although preparation for adult life is a key component of FAPE throughout the educational experiences of students with disabilities, Part B sets forth specific requirements related to transition planning and transition services that must be implemented no later than ages 14 and 16, respectively, and which require an intensified focus on that preparation as these students begin and prepare to complete their secondary education.

**What must the IEP team do to meet the requirements that the IEP include "a statement of ... transition service needs" beginning at age 14 (§300.347(b)(1)(I)), "and a statement of needed transition services" no later than age 16 (§300.347(b)(2))?**

Section 300.347(b)(1) requires that, beginning no later than age 14, each student's IEP include specific transition-related content, and, beginning no later than age 16, a statement of needed transition services:

*Beginning at age 14* and younger if appropriate, and updated annually, each student's IEP must include:

"... a statement of the transition service needs of the student under the applicable components of the student's IEP that focuses on the student's courses of study (such as participation in advanced-placement courses or a vocational education program)" (§300.347(b)(1)(I)).

*Beginning at age 16* (or younger, if determined appropriate by the IEP team), each student's IEP must include:

"... a statement of needed transition services for the student, including, if appropriate, a statement of the interagency responsibilities or any needed linkages" (§300.347(b)(2)).

The Committee Reports on the IDEA Amendments of 1997 make clear that the requirement added to the statute in 1997 that beginning at age 14, and updated annually, the IEP include "a statement of the transition service needs" is "... designed to augment, and not replace," the separate, preexisting requirement that the IEP include, "... beginning at age 16 (or younger, if determined appropriate by the IEP team), a statement of needed transition services ..." (H. Rep. No. 105-95, p. 102 (1997); S. Rep. No. 105-17, p. 22 (1997)). As clarified by the Reports, "The purpose of [the requirement in §300.347(b)(1)(I)] is to focus attention on how the child's

educational program can be planned to help the child make a successful transition to his or her goals for life after secondary school." (H. Rep. No. 105-95, pp. 101-102 (1997); S. Rep. No. 105-17, p. 22 (1997)). The Reports further explain that "[F]or example, for a child whose transition goal is a job, a transition service could be teaching the child how to get to the job site on public transportation" (H. Rep. No. 105-95, p. 102 (1997); S. Rep. No. 105-17, p. 22 (1997)).

Thus, beginning at age 14, the IEP team, in determining appropriate measurable annual goals (including benchmarks or short-term objectives) and services for a student must determine what instruction and educational experiences will assist the student in preparing for transition from secondary education to post-secondary life.

The statement of transition service needs should relate directly to the student's goals beyond secondary education and show how planned studies are linked to these goals. For example, a student interested in exploring a career in computer science may have a statement of transition services needs connected to technology course work, while another student's statement of transition services needs could describe why public bus transportation training is important for future independence in the community.

Although the focus of the transition planning process may shift as the student approaches graduation, the IEP team must discuss specific areas beginning, at least at the age of 14 years, and review these areas annually. As noted in the Committee Reports, a disproportionate number of students with disabilities drop out of school before they complete their secondary education. "Too many students with disabilities are failing courses and dropping out of school. Almost twice as many students with disabilities drop out as compared to students without disabilities." (H. Rep. No. 105-95, p. 85 (1997), S. Rep. No. 105-17, p. 5 (1997).)

To reduce the number of students with disabilities that drop out, it is important that the IEP team work with each student with a disability and the student's family to select courses of study that will be meaningful to the student's future and motivate the student to complete his or her education.

This requirement is distinct from the requirement, at §300.347(b)(2), that the IEP include: ... beginning at age 16 (or younger, if determined appropriate by the IEP team), a statement of needed transition services for the child, including, if appropriate, a statement of the interagency responsibilities or any needed linkages.

The term "transition services" is defined at §300.29 to mean: ... a coordinated set of activities for a student with a disability that-(1) is designed within an outcome-oriented process that promotes movement from school to post-high school activities, including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation; (2) Is based on the individual student's needs, taking into account the student's preferences and interests; and (3) Includes-(I) Instruction; (ii) Related services; (iii) Community experiences; (iv) The development of employment and other post-high school adult living objectives; and (v) If appropriate, acquisition of daily living skills and functional vocational evaluation.

Thus, while §300.347(b)(1) requires that the IEP team begin by age 14 to address the student's need for instruction that will assist the student to prepare for transition, the IEP must include by age 16 a statement of needed transition services under §300.347(b)(2) that includes a "coordinated set of activities ... designed within an outcome-oriented process, that promotes movement from school to post-high school activities .... " (§300.29) Section 300.344(b)(3) further requires that, in implementing §300.347(b)(1), public agencies (in addition to required participants for all IEP meetings) must also invite a representative of any other agency that is likely to be responsible for providing or paying for transition services. Thus, §300.347(b)(2) requires a broader focus on coordination of services across, and linkages between, agencies beyond the SEA and LEA.

**Must the IEP for each student with a disability, beginning no later than age 16, include all "needed transition services," as identified by the IEP team and consistent with the definition at §300.29, even if an agency other than the public agency will provide those services? What is the public agency's responsibility if another agency fails to provide agreed-upon transition services?**

Section 300.347(b)(2) requires that the IEP for each child with a disability, beginning no later than age 16, or younger if determined appropriate by the IEP team, include all "needed transition services," as identified by the IEP team and consistent with the definition at §300.29, regardless of whether the public agency or some other agency will provide those services. Section 300.347(b)(2) specifically requires that the statement of needed transition services

include, "... if appropriate, a statement of the interagency responsibilities or any needed linkages."

Further, the IDEA Amendments of 1997 also permit an LEA to use up to five percent of the Part B funds it receives in any fiscal year in combination with other amounts, which must include amounts other than education funds, to develop and implement a coordinated services system. These funds may be used for activities such as: (1) linking IEPs under Part B and Individualized Family Service Plans (IFSPs) under Part C, with Individualized Service Plans developed under multiple Federal and State programs, such as Title I of the Rehabilitation Act; and (2) developing and implementing interagency financing strategies for the provision of services, including transition services under Part B.

The need to include, as part of a student's IEP, transition services to be provided by agencies other than the public agency is contemplated by §300.348(a), which specifies what the public agency must do if another agency participating in the development of the statement of needed transition services fails to provide a needed transition service that it had agreed to provide.

If an agency does not provide the agreed-upon service and it is not provided by another agency, the public agency responsible for the student's education must implement alternative strategies to meet the student's needs. This requires that the public agency provide the services, or convene an IEP meeting as soon as possible to identify alternative strategies to meet the transition services objectives and to revise the IEP accordingly.

Alternative strategies might include the identification of another funding source, referral to another agency, the public agency's identification of other district-wide or community resources that it can use to meet the student's identified needs appropriately, or a combination of these strategies. As emphasized by §300.348(b):

Nothing in [Part B] relieves any participating agency, including a state vocational rehabilitation agency, of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet the eligibility criteria of that agency.

The fact that an agency other than the public agency does not fulfill its responsibility does not relieve the public agency of its responsibility to ensure that FAPE is available to each student with a disability. (Section 300.142(b)(2) specifically requires that if an agency other than

the LEA fails to provide or pay for a special education or related service (which could include a transition service), the LEA must, without delay, provide or pay for the service, and may then claim reimbursement from the agency that failed to provide or pay for the service.

**Under what circumstances must a public agency invite representatives from other agencies to an IEP meeting at which a child's need for transition services will be considered?**

Section 300.344 requires that, "In implementing the requirements of [§300.347(b)(1)(ii) requiring a statement of needed transition services], the public agency shall also invite a representative of any other agency that is likely to be responsible for providing or paying for transition services." To meet this requirement, the public agency must identify all agencies that are "likely to be responsible for providing or paying for transition services" for each student addressed by §300.347(b)(1) and must invite each of those agencies to the IEP meeting. If an agency invited to send a representative to a meeting does not do so, the public agency must take other steps to obtain the participation of that agency in the planning of transition services.

If, during the course of an IEP meeting, the team identifies additional agencies that are "likely to be responsible for providing or paying for transition services" for the student, the public agency must determine how it will meet the requirements of §300.344.

**Comments and Discussion about Transition services (§300.29) from the Federal Regulations**

*Comment:* Many commenters supported the transition services definition in these regulations, but recommended that the definition be amended to include, in paragraph (1)(c)(vi), self-advocacy, career planning, and career guidance. This comment also emphasized the need for coordination between this provision and the Perkins Act to ensure that students with disabilities in middle schools will be able to access vocational education funds.

One commenter recommended that the definition of "transition services" either be narrowed to post-high school transition or that other transitions, such as transition from Part C to Part B, be defined elsewhere in these regulations.

*Discussion:* The Act's "transition services" definition should be retained as written. In light of the general decision not to use notes in these final regulations, the note following this section of the NPRM should be removed. It is important to clarify that transition services for students with disabilities may be special education if they are provided as specially designed instruction or related services, if they are required to assist a student with a disability to benefit from special education, and that the list of activities in the definition is not intended to be exhaustive.

Additional examples of transition services are not needed because the current definition is sufficiently broad to encompass these activities. Nor is it necessary to amend the definition to reference the Perkins Act, since, under current law, students with disabilities, including those in middle schools, can participate in these Federally-funded programs and must be provided necessary accommodations to ensure their meaningful participation.

Further, the definition of "transition services" should not be narrowed or expanded to include other transitions, because to do so could be inconsistent with congressional intent that public agencies provide students with disabilities the types of needed services to facilitate transition from school to post-high school activities.

### **School-To-Work Opportunities Act (STOWA)**

The broad purpose of STOWA is to reform educational and vocational programs. In addition, this law is intended to expose all students to a broad array of career opportunities and to facilitate the selection of career majors based on individual interests, strengths, and goals. Another key purpose is to increase opportunities for minorities, women, and individuals with disabilities by enabling these individuals to prepare for careers in fields where they have been traditionally underrepresented.

While there are no final regulations to implement this law, some states are receiving implementation grants to develop comprehensive school-to-work systems for all students. Under Title II of this law, states must describe how their school-to-work system will coordinate or integrate existing local school-to-work programs with funds from the Perkins Act Amendments of 1990, the Goals 2000: Educate America Act of 1994 the National Skills Standard Act of 1994, IDEA, JTPA, and the Rehabilitation Act.

The three components to be included in school-to-work programs are school-based learning, work-based learning, and connecting activities. Each component includes language concerning assessment and transition activities.

- \* **School-Based Learning Component.** School-based learning activities target career awareness and career exploration and counseling to help students identify, select, or reconsider their interests, goals and career majors, including those options that may not be traditional for their gender, race, or ethnicity. These activities should begin as early as possible, but no later than 7th grade.
- \* **Work-Based Learning Component.** This component includes activities such as job shadowing, on-the-job training, and work experience.
- \* **Connecting Activities.** Connecting activities include matching students with employers to promote work-based learning opportunities and linking students with other community services that may be necessary to ensure a successful transition from school to work.

The identification of transition services is required for all students with a disability in conjunction with their IEPs. Transition services are not meant to be separate from the student's IEP, but rather infused throughout the student's IEP to result in a comprehensive blueprint for the student's future.

Although IDEA '97 requires that transition services be addressed by age 14, the law encourages that transition services be addressed for students younger than age 14 if this is determined to be appropriate. Provision of transition services at an earlier age can have a positive affect on employment and adult living outcomes. Therefore, transition services should be provided for some students 12 or younger because many students with disabilities (a) drop out of school at age 16, (b) stay in school until age 18, but need more than two years of transition services because of the severity of their disability, and (c) the prerequisites for continuing on to post-secondary education requires long-term preparation.

### **New York State Part 200 Regulations**

According to the New York State Part 200 Regulations Transition Services means a coordinated set of activities "for a student with a disability", designed within an outcome-oriented process that promotes movement from school to post-high school activities including,

but not limited to, post-secondary education, vocational training, integrated competitive employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.

The coordinated set of activities must be based on the individual student's needs, taking into account the student's preferences and interests, and shall include needed activities in the following areas:

- (1) instruction;
- (2) related services;
- (3) community experiences; and
- (4) the development of employment and other post-high school adult living objectives;
- (5) if appropriate, acquisition of daily living skills and functional vocational evaluation.

Travel training is a special education service that means providing instruction, as appropriate, to students with significant cognitive disabilities and any other students with disabilities who require this instruction, to enable them to develop an awareness of the environment in which they live; and learn the skills to move effectively and safely from place to place within that environment (e.g., in school, in the home, at work, and in the community).

# An Agency Guide to Understanding Transition in New York: The IDEA Way

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**Transition Planning for College**



## **Laws Governing Post-Secondary Education:**

The laws governing education for students with disabilities in grades K-12 (IDEA and Section 504 of the Rehabilitation Act of 1973, Subpart D) are very different from the laws governing accommodating students with disabilities in post-secondary educational settings (Title II (for public institutions) and Title III (for private institutions) of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act of 1973, Subpart E).

Under IDEA, K-12 schools are required to provide a "free and appropriate" education tailored specifically to students' needs (as detailed in an IEP/504 Plan). Section 504 of the Rehabilitation Act of 1973 (Subpart E), and Titles II and III of the Americans with Disabilities Act, which regulate post-secondary education, require that a student be accommodated to ensure equal opportunity. ONLY equality of access and opportunity is ensured, not a disability-appropriate education (Borst, 1998). In other words, these are civil rights laws that prevent discrimination against qualified students in access to programs or activities at the post-secondary level.

Specifically, Section 504 states:

No otherwise qualified individual with a disability in the United States shall solely by reason of his (or her) disability, be excluded from participation in, be denied benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance, or under any program conducted by any executive agency or by the United States Postal Service (104.4).

The Americans with Disabilities Act states in part that:

A qualified individual with a disability means an individual with a disability who, with or without reasonable modifications to rules, policies or practices, the removal of architectural communication, or transportation barriers, or the provision of auxiliary aids and services, meets the essential eligibility requirements for the receipt of services or the participation in programs or activities provided by a public entity. (ADA 42 U.S.C. Sec. 12111)

An in-depth explanation of the ADA and Section 504 is not within the scope of this publication. However, an understanding of some of the key differences in secondary and post-secondary educational services may be necessary in developing the Transition IEP.

HIGH SCHOOL	COLLEGE
<b>Right to Education</b>	
<i>IDEA</i> Education Entitlement Law	<i>Section 504 &amp; ADA</i> Civil Rights Discrimination Laws
<b>Student Success</b>	<b>Student Access</b>
<i>SERVICES</i> To promote student <b>success</b>  Examples: Resource Room Tutoring 1:1 Aides	<i>ACCOMMODATIONS</i> To provide student <b>access</b> based on functional limitation resulting from disability, not on disability label Examples: Class notes Test time extended Test separate location
Services Based on Need	Accommodations Based on Eligibility
District Identifies Student	Student Self Identifies
District Evaluates	Student responsibility to provide current documentation of disability & accommodation needs
District develops legal IEP plan Parent involvement District ensures implementation  Plan is reviewed annually	No plan legally required Parent involvement limited Student responsible for follow Through  No mandated review process

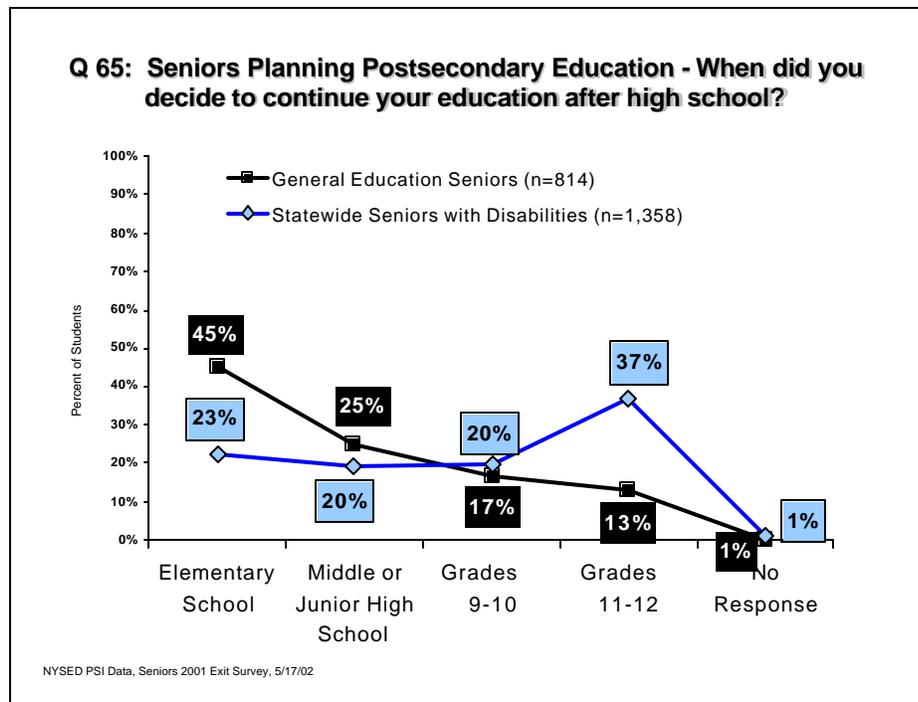
(Rochester Area Advocacy Consortium for College Students with Disabilities, 2002)

### **Planning for the Transition to Post-Secondary Education:**

Planning for college for students with disabilities needs to start early.

In New York State..."(f)or the 1997-1998 school year, 9,405 students with disabilities graduated from New York high schools. Of these graduates, 58 percent reported that they had plans to continue to some post-secondary educational institution, either four-year or two-year college. In comparison, nearly 83 percent of students without disabilities in New York State go on to some form of postsecondary education".

(Report of the Task Force on Postsecondary Education and Disabilities, March 2000)



The reason for the discrepancy in attendance at post-secondary institutions between students with and without disabilities is due, in part, to lack of planning. For students who do not have a disability, planning starts early for college based on the expectation that the student will be continuing their education after high school. (This planning usually starts in elementary or middle school.) For students with disabilities, most families do not start planning for college until the student's junior or senior year, when it is too late. Even colleges with "open enrollment" require a local diploma or GED. An IEP diploma is not sufficient for admission to post-secondary institutions. Preparatory classes need to be taken at the high school level to ensure that a student has the option to continue on to post-secondary education.

The following timeline has been adapted from the University of Arizona SALT program. This timeline is a good guide for transition planning for college.

### **Freshman Year:**

- Meet with counseling staff and teachers (mainstreamed and special ed)
- Establish accommodations and courses
- Current IEP/504 Plan (you need to be an active participant)
- Learn to use assistive technology
- Use support services including tutoring, help from teachers, etc.
- Know what type of learner you are

- Know your disability, strengths and weaknesses
- Be aware of required classes to take in high school to be eligible for colleges (careful about waivers of foreign language or math).

### **Sophomore Year:**

- Meet with counseling staff and teachers
- Current IEP/504 accommodation plan
- Use support services
- Focus on strengths and learn strategies that work best for you
- Establish mentor relationship
- Take PSAT or PACT preparation class
- Visit with a college recruiter
- Begin building academic resume
- Volunteering
- Job
- Internship
- Clubs
- Visit nearby college institution to get a feel for higher education

### **Junior Year:**

- Meet with the counseling staff and teachers
- Current IEP/504 accommodation plan
- Take PSAT/PACT- seek support or tutoring if necessary
- Continue academic resume building
- Choose 5-10 colleges to research
- Visit campuses online
- Check for LD/ADD programs- have list of qualities of program that you are looking for
- Request/Download application to practice filling out
- Investigate scholarships
- Meet with college recruiter- find out what they are looking for
- Work on personal statement for college application
- Utilize support services (JR. year of high school often most difficult)
- Make a list of qualities/requirements that you want in a college
- Attend college fairs/college nights
- Visit campus/admissions/Disability Services Office (Tour campus)

### **Senior Year:**

- Meet with counseling staff and teachers
- Current IEP/504 accommodation plan
- Make sure documentation/LD testing is up to date and request college documentation requirements from prospective colleges.
- Take SAT/ACT

- Apply to top choices for college
- Visit campus/admissions/Disability Services
- Take interest inventory-to create a list of possible choices for a major in college
- Apply for financial aid/scholarships (research specific disability related scholarships)
- Fine tune academic resume
- Get letters of recommendation
- Notify college of your intentions to attend
- Return residence hall information, deposits and deposits for orientation
- Have a very clear understanding of your disability and ADA/Section 504
- Knowledge of useful learning/studying strategies
- Attend Orientation

### **Admission to College:**

It is illegal for colleges to ask whether a student applying to their institution has a disability. At the same time, colleges have the legal right to uphold their admission standards, and are not mandated to admit any student, with or without disabilities, who does not meet those standards.

Students should consult with the office that provides services for students with disabilities about whether special consideration may be granted by the Admissions Office due to the nature of their disability, or the fact that they may have a weak high school program because their disability was recently diagnosed. (This is usually accomplished through the essay part of the application or through an interview with an admissions counselor.)

### **Services at Post-Secondary Institutions:**

At the post-secondary level a student requesting services:

- must self-identify as a person with a disability to the office that provides services to students with disabilities. (Requires self-advocacy skills)
- must provide current documentation from a qualified professional that includes a specific diagnosis, states the impact on a major life activity, the level of that impact, recommends possible appropriate accommodations. (An IEP/504 plan may not be, in and of itself, sufficient documentation to access services at the post-secondary level, and cognitive testing must be adult-normed.)

- may not get many of the modifications that were allowed in high school as a result of the differences in the laws. (For example, test modifications *may* include taped tests, extended time or distraction-reduced environment. They will almost never include alternative methods such as multiple choice instead of essay exams, or rewording of questions.)
- will be expected to follow the institution's Student Code of Conduct. (Students unable to comply with the code due to a behavioral disorder may be deemed "otherwise unqualified" and can be dismissed from the college.)
- may *not* be waived from foreign language or math. The decision about course waivers or substitutions is institution specific. This must be considered in developing the Transition IEP. A student's choice of post-secondary institution may be limited if the student does not take math or foreign language.
- will have the same access to tutoring and other resources as the rest of the student population. (Some institutions offer tutoring/learning centers for students with disabilities and some don't)

Early and thorough planning is crucial for students with disabilities who wish to attend college. There are a number of agency and college websites that are excellent resources for planning. They are listed in the Appendix.

# An Agency Guide to Understanding Transition in New York: The IDEA Way

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**Appendices**



## Appendix A - Terminology

- Community Experiences - Services provided outside the school building, in community settings by schools or other agencies
- Coordinated - linkages between each of the component activities that comprise transition services, and - interrelationship between the various agencies that are involved in the provision of transition services to a student
- Coordinated set of activities - (substitute the word strategies for activities) may mean those things which are a part of or done in order to achieve a specific goal or objective
- Daily Living Skills - Activities adults do every day. Could be provided by schools or other entities
- Disabled persons means a person who (i) has a physical or mental impairment which substantially limits one or more major life activities, (ii) has a record of such an impairment, or (iii) is regarded as having such an impairment. (104.3)
- Employment / Other Post-school Adult Living Objectives - Services that lead to a job or career, and important adult activities. Could be provided by schools or other entities.
- Functional Vocational Evaluation - Assessment that provides information about job or career interests, aptitudes and skills. Could be provided by schools or other entities.
- Individual Education Plan (IEP) - A written legal document for the education of a student with a disability that is developed and implemented according to the criteria originally presented in PL 94-142, updated to PL 101-476, now delineated in PL 105-17.
- Individuals with Disabilities Education Act (IDEA) also known as PL 101-476 - A federal law that amended and expanded PL 94-142, the Education of All Handicapped Children Act of 1975. The law renamed and combined the original act and its amendments.
- Instruction - use of formal techniques to impart knowledge. Typically provided in schools, could be provided by other entities or in other locations.
- Job Coach - A person designated as a work supervisor for a person with severe disabilities in competitive employment. The job coach serves in an instructional capacity working and modeling alongside the individual with a disability.
- Local Education Agency (LEA) - An administrative arrangement referred to by federal and state legislation to designate the entity responsible for providing public education through 12th grade - usually the school district.

- Otherwise qualified: the individual must satisfy the requisite skills, experience, education, and other education-related requirements, with or without reasonable accommodations, and be able to perform the essential functions of the program or course.
- Outcome-oriented process - refers to the results or intended effect of the activities of the student.
- Related Services - Means transportation and such developmental, corrective, and other supportive services as are required to assist a child with a disability to benefit from special education (section 300.22) (section 1401(22) of IDEA '97).
- Statement of needed transition services within the IEP is a long range, 2 - 4 years or longer, plan for adult life.
- Statement of transition service needs - focuses on the student's course of study. It is an identification of and planning for the courses that the student will take each year from 14 years on.
- Transition Programming - Services that provide a bridge between school and employment.

## Appendix B

### Individuals with Disabilities Education Act - Amendments '97 (PL 105-15)

The following section provides the definitions and terminology explained in IDEA '97

#### §300.26 Special education.

(a) General.

- (1) As used in this part, the term special education means specially designed instruction, at no cost to the parents, to meet the unique needs of a child with disability, including-
  - (i) Instruction conducted in the classroom, in the home, in hospitals and institutions, and in other settings; and
  - (ii) Instruction in physical education.
- (2) The term includes each of the following, if it meets the requirements of paragraph (a)(1) of this section:
  - (i) Speech-language pathology services, or any other related service, if the service is considered special education rather than a related service under State standards;
  - (ii) Travel training; and
  - (iii) Vocational education.

(b) Individual terms defined. The terms in this definition are defined as follows:

- (1) At no cost means that all specially-designed instruction is provided without charge, but does not preclude incidental fees that are normally charged to non-disabled students or their parents as a part of the regular education program.
- (2) Physical education-
  - (i) Means the development of
    - (A) Physical and motor fitness;
    - (B) Fundamental motor skills and patterns; and
    - (C) Skills in aquatics, dance, and individual and group games and sports (including intramural and lifetime sports); and
  - (ii) Includes special physical education, adapted physical education, movement

education, and motor development.

- (3) Specially-designed instruction means adapting, as appropriate to the needs of an eligible child under this part, the content, methodology, or delivery of instruction-
- (i) To address the unique needs of the child that result from the child's disability; and
  - (ii) To ensure access of the child to the general curriculum, so that he or she can meet the educational standards within the jurisdiction of the public agency that apply to all children.
- (4) Travel training means providing instruction, as appropriate, to children with significant cognitive disabilities, and any other children with disabilities who require this instruction, to enable them to-
- (i) Develop an awareness of the environment in which they live; and
  - (ii) Learn the skills necessary to move effectively and safely from place to place within that environment (e.g., in school, in the home, at work, and in the community).
- (5) Vocational education means organized educational programs that are directly related to the preparation of individuals for paid or unpaid employment, or for additional preparation for a career requiring other than a baccalaureate or advanced degree.

(Authority: 20 U.S.C. 1401(25))

**§300.28 Supplementary aids and services.**

As used in this part, the term supplementary aids and services means aids, services, and other supports that are provided in regular education classes or other education-related settings to enable children with disabilities to be educated with nondisabled children to the maximum extent appropriate in accordance with §§300.550-300.556.

(Authority: 20 U.S.C. 1401(29))

**§300.29 Transition services.**

- (a) As used in this part, transition services means a coordinated set of activities for a student with a disability that-

- (1) Is designed within an outcome-oriented process, that promotes movement from school to post-high school activities, including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation;
  - (2) Is based on the individual student's needs, taking into account the student's preferences and interests; and
  - (3) Includes-
    - (i) Instruction;
    - (ii) Related services;
    - (iii) Community experiences;
    - (iv) The development of employment and other post-high school adult living objectives; and
    - (v) If appropriate, acquisition of daily living skills and functional vocational evaluation.
- (b) Transition services for students with disabilities may be special education, if provided as specially designed instruction, or related services, if required to assist a student with a disability to benefit from special education.
- (Authority: 20 U.S.C. 1401(30))

**§300.244 Coordinated services system.**

- (a) General. A Local Education Agency (LEA) may not use more than 5 percent of the amount the agency receives under Part B of the Act for any fiscal year, in combination with other amounts (which must include amounts other than education funds), to develop and implement a coordinated services system designed to improve results for children and families, including children with disabilities and their families.
- (b) Activities. In implementing a coordinated services system under this section, an LEA may carry out activities that include-
  - (1) Improving the effectiveness and efficiency of service delivery, including developing strategies that promote accountability for results;

- (2) Service coordination and case management that facilitate the linkage of IEPs under Part B of the Act and IFSPs under Part C of the Act with individualized service plans under multiple Federal and State programs, such as title I of the Rehabilitation Act of 1973 (vocational rehabilitation), Title XIX of the Social Security Act (Medicaid), and Title XVI of the Social Security Act (supplemental security income);
  - (3) Developing and implementing interagency financing strategies for the provision of education, health, mental health, and social services, including transition services and related services under the Act; and
  - (4) Interagency personnel development for individuals working on coordinated services.
- (c) Coordination with certain projects under Elementary and Secondary Education Act of 1965. If an LEA is carrying out a coordinated services project under Title XI of the Elementary and Secondary Education Act of 1965 and a coordinated services project under Part B of the Act in the same schools, the agency shall use the amounts under §300.244 in accordance with the requirements of that title.
- (Authority: 20 U.S.C. 1413(f))

**§300.340 Definitions related to IEPs.**

- (a) Individualized education program. As used in this part, the term individualized education program or IEP means a written statement for a child with a disability that is developed, reviewed, and revised in a meeting in accordance with §§300.341-300.350.
  - (b) Participating agency. As used in §300.348, participating agency means a State or local agency, other than the public agency responsible for a student's education, which is financially and legally responsible for providing transition services to the student.
- (Authority: 20 U.S.C. 1401(11), 1412(a)(10)(B))

**§300.344 IEP team.**

- (a) General. The public agency shall ensure that the IEP team for each child with a disability includes-
  - (1) The parents of the child;
  - (2) At least one regular education teacher of the child (if the child is, or may be, participating in the regular education environment);
  - (3) At least one special education teacher of the child, or if appropriate, at least one special education provider of the child;
  - (4) A representative of the public agency who -
    - (i) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities;
    - (ii) Is knowledgeable about the general curriculum; and
    - (iii) Is knowledgeable about the availability of resources of the public agency;
  - (5) An individual who can interpret the instructional implications of evaluation results, who may be a member of the team described in paragraphs (a)(2) through (6) of this section;
  - (6) At the discretion of the parent or the agency, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and
  - (7) If appropriate, the child.
- (b) Transition services participants.
  - (1) Under paragraph (a)(7) of this section, the public agency shall invite a student with a disability of any age to attend his or her IEP meeting if a purpose of the meeting will be the consideration of-
    - (i) The student's transition services needs under §300.347(b)(1); or
    - (ii) The needed transition services for the student under §300.347(b)(2); or
    - (iii) Both.
  - (2) If the student does not attend the IEP meeting, the public agency shall take other steps to ensure that the student's preferences and interests are considered.
  - (3)(i) In implementing the requirements of §300.347(b)(2), the public agency also

shall invite a representative of any other agency that is likely to be responsible for providing or paying for transition services.

- (ii) If an agency invited to send a representative to a meeting does not do so, the public agency shall take other steps to obtain participation of the other agency in the planning of any transition services.
- (c) Determination of knowledge and special expertise. The determination of the knowledge or special expertise of any individual described in paragraph (a)(6) of this section shall be made by the party (parents or public agency) who invited the individual to be a member of the IEP.
- (d) Designating a public agency representative. A public agency may designate another public agency member of the IEP team to also serve as the agency representative, if the criteria in paragraph (a)(4) of this section are satisfied.

(Authority: 20 U.S.C. 1401(30), 1414(d)(1)(A)(7), (B))

**§300.345 Parent participation.**

- (a) Public agency responsibility-general. Each public agency shall take steps to ensure that one or both of the parents of a child with a disability are present at each IEP meeting or are afforded the opportunity to participate, including-
  - (1) Notifying parents of the meeting early enough to ensure that they will have an opportunity to attend; and
  - (2) Scheduling the meeting at a mutually agreed on time and place.
- (b) Information provided to parents.
  - (1) The notice required under paragraph (a)(1) of this section must-
    - (i) Indicate the purpose, time, and location of the meeting and who will be in attendance; and
    - (ii) Inform the parents of the provisions in §300.344(a)(6) and (c) (relating to the participation of other individuals on the IEP team who have knowledge or special expertise about the child).
  - (2) For a student with a disability beginning at age 14, or younger, if appropriate, the notice must also-
    - (i) Indicate that a purpose of the meeting will be the development of a statement

- of the transition services needs of the student required in §300.347(b)(1); and
- (ii) Indicate that the agency will invite the student.
- (3) For a student with a disability beginning at age 16, or younger, if appropriate, the notice must-
- (i) Indicate that a purpose of the meeting is the consideration of needed transition services for the student required in §300.347(b)(2);
  - (ii) Indicate that the agency will invite the student; and
  - (iii) Identify any other agency that will be invited to send a representative.
- (c) Other methods to ensure parent participation. If neither parent can attend, the public agency shall use other methods to ensure parent participation, including individual or conference telephone calls.
- (d) Conducting an IEP meeting without a parent in attendance. A meeting may be conducted without a parent in attendance if the public agency is unable to convince the parents that they should attend. In this case the public agency must have a record of its attempts to arrange a mutually agreed on time and place, such as -
- (1) Detailed records of telephone calls made or attempted and the results of those calls;
  - (2) Copies of correspondence sent to the parents and any responses received; and
  - (3) Detailed records of visits made to the parent's home or place of employment and the results of those visits.
- (e) Use of interpreters or other action, as appropriate. The public agency shall take whatever action is necessary to ensure that the parent understands the proceedings at the IEP meeting, including arranging for an interpreter for parents with deafness or whose native language is other than English.
- (f) Parent copy of child's IEP. The public agency shall give the parent a copy of the child's IEP at no cost to the parent.
- (Authority: 20 U.S.C. 1414(d)(1)(B)(i))

**§300.347 Content of IEP.**

- (a) General. The IEP for each child with a disability must include-
- (1) A statement of the child's present levels of educational performance, including -

- (i) How the child's disability affects the child's involvement and progress in the general curriculum (i.e., the same curriculum as for nondisabled children); or
  - (ii) For preschool children, as appropriate, how the disability affects the child's participation in appropriate activities;
- (2) A statement of measurable annual goals, including benchmarks or short-term objectives, related to -
  - (i) Meeting the child's needs that result from the child's disability to enable the child to be involved in and progress in the general curriculum (i.e., the same curriculum as for nondisabled children), or for preschool children, as appropriate, to participate in appropriate activities; and
  - (ii) Meeting each of the child's other educational needs that result from the child's disability;
- (3) A statement of the special education and related services and supplementary aids and services to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided for the child-
  - (i) To advance appropriately toward attaining the annual goals;
  - (ii) To be involved and progress in the general curriculum in accordance with paragraph (a)(1) of this section and to participate in extracurricular and other nonacademic activities; and
  - (iii) To be educated and participate with other children with disabilities and non-disabled children in the activities described in this section;
- (4) An explanation of the extent, if any, to which the child will not participate with non-disabled children in the regular class and in the activities described in paragraph (a)(3) of this section;
- (5) (i) A statement of any individual modifications in the administration of State or district-wide assessments of student achievement that are needed in order for the child to participate in the assessment; and
  - (ii) If the IEP team determines that the child will not participate in a particular State or district-wide assessment of student achievement (or part of an assessment), a statement of -

- (A) Why that assessment is not appropriate for the child; and
  - (B) How the child will be assessed;
- (6) The projected date for the beginning of the services and modifications described in paragraph (a)(3) of this section, and the anticipated frequency, location, and duration of those services and modifications; and
- (7) A statement of -
- (i) How the child's progress toward the annual goals described in paragraph (a)(2) of this section will be measured; and
  - (ii) How the child's parents will be regularly informed (through such means as periodic report cards), at least as often as parents are informed of their non-disabled children's progress, of -
    - (A) Their child's progress toward the annual goals; and
    - (B) The extent to which that progress is sufficient to enable the child to achieve the goals by the end of the year.
- (b) Transition services. The IEP must include-
- (1) For each student with a disability beginning at age 14 (or younger, if determined appropriate by the IEP team), and updated annually, a statement of the transition service needs of the student under the applicable components of the student's IEP that focuses on the student's courses of study (such as participation in advanced-placement courses or a vocational education program); and
  - (2) For each student beginning at age 16 (or younger, if determined appropriate by the IEP team), a statement of needed transition services for the student, including, if appropriate, a statement of the interagency responsibilities or any needed linkages.
- (c) Transfer of rights. In a State that transfers rights at the age majority, beginning at least one year before a student reaches the age of majority under State law, the student's IEP must include a statement that the student has been informed of his or her rights under Part B of the Act, if any, that will transfer to the student on reaching the age of majority, consistent with §300.517.
- (d) Students with disabilities convicted as adults and incarcerated in adult prisons. Special rules concerning the content of IEPs for students with disabilities convicted

as adults and incarcerated in adult prisons are contained in §300.311(b) and (c).

(Authority: 20 U.S.C. 1414(d)(1)(A) and (d)(6)(A)(ii))

**§300.348 Agency responsibilities for transition services.**

- (a) If a participating agency, other than the public agency, fails to provide the transition services described in the IEP in accordance with §300.347(b)(1), the public agency shall reconvene the IEP team to identify alternative strategies to meet the transition objectives for the student set out in the IEP.
- (b) Nothing in this part relieves any participating agency, including a State vocational rehabilitation agency, of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet the eligibility criteria of that agency.

(Authority: 20 U.S.C. 1414(d)(5); 1414(d)(1)(A)(vii))

## **Appendix C-Transition and Higher Education Resource Websites**

### **Transition:**

[www.ggw.org/advocacyconsortium](http://www.ggw.org/advocacyconsortium)

<http://www.ccdanet.org>

[http://collegeprep.okstate.edu \(/homepages.nsf/loc/disabilities1\)](http://collegeprep.okstate.edu (/homepages.nsf/loc/disabilities1))

<http://www.vesid.nysed.gov/specialed/transition/rp0299/word/0299rr5.htm>

### **Academic Support:**

[www.csu.edu.au/division/studserv/learning](http://www.csu.edu.au/division/studserv/learning)

[www.iss.stthomas.edu/studyguides](http://www.iss.stthomas.edu/studyguides)

[www.ucc.vt.edu/stdyhlp.html](http://www.ucc.vt.edu/stdyhlp.html)

[www.d.umn.edu/student/loon/acad/strat](http://www.d.umn.edu/student/loon/acad/strat)

### **ADA/504:**

[www.access-board.gov](http://www.access-board.gov)

[www.ed.gov/ocr](http://www.ed.gov/ocr)

[www.usdoj.gov](http://www.usdoj.gov)

### **General Resources (Many links to helpful sites):**

[www.ahead.org](http://www.ahead.org)

[www.ncl.org \(http://www.ncl.org/resources/resource\\_dir.cfm\)](http://www.ncl.org (http://www.ncl.org/resources/resource_dir.cfm))

[www.okc.cc.ok.us/okahead/home/resource.html](http://www.okc.cc.ok.us/okahead/home/resource.html)

[www.ldonline.com](http://www.ldonline.com)

[www.washington.edu/doit](http://www.washington.edu/doit)

[www.heath.qwu.edu](http://www.heath.qwu.edu)

## Appendix D-Checklists and Forms

### A Checklist for Student's Understanding of their Abilities and Post-School

#### Goals

1. I know why I receive extra help in the classroom.
2. I know what problems I have learning.
3. I have seen my triennial evaluation. (3 year tests)
4. I understand my evaluation tests.
5. I attended my last IEP meeting.
6. I helped plan my schedule for this school year.
7. I have special rights and responsibilities if I have problems learning.
8. I am an auditory learner.
9. I am a visual learner.
10. I pass all my classes with at least a "C".
11. I can explain my strengths (what I am good at doing.)
12. I can explain my problems and difficulties.
13. I ask questions in class.
14. I participate in classroom discussions.
15. I am an effective problem solver.
16. I have asked a teacher for special help on a class test.
17. If I do not understand something, I ask a teacher.
18. I know the right way to behave in different situations.
19. I am uncomfortable talking to teachers.
20. I can tell teachers how they can help make learning easier for me.
21. I know what I'll be doing in five years.
22. I am taking steps now to reach my five-year goal.

	Yes	No	Don't Know
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
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12.			
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20.			
21.			
22.			

## Checklist for Developing a Community Interagency Council

- \_\_\_\_\_ Establish a community transition planning council
- \_\_\_\_\_ Determine whom to include on a council
- \_\_\_\_\_ Establish the philosophy and mission of the council
- \_\_\_\_\_ Provide information on the process of successful council collaboration
- \_\_\_\_\_ Provide understanding of role and responsibilities of each member
- \_\_\_\_\_ Complete a district/community needs assessment
- \_\_\_\_\_ Develop the infrastructure of the council (e.g., meeting times)
- \_\_\_\_\_ Develop and distribute a matrix of available services and informational and community relations products.
  
- \_\_\_\_\_ Develop interagency partnership between school districts and state and local agencies:
- \_\_\_\_\_ Define the role and responsibility of each agency
- \_\_\_\_\_ Define the role and responsibility of the school districts
- \_\_\_\_\_ Establish procedures to implement the partnership
- \_\_\_\_\_ Develop a plan of action to resolve conflicts (i.e., reduce duplication of services)
- \_\_\_\_\_ Use Interagency Council as a forum for recommending solutions when individual issues may arise
- \_\_\_\_\_ Maintain collaboration among agencies and schools
- \_\_\_\_\_ Maintain regular attendance to Interagency Council Meetings
  
- \_\_\_\_\_ Review the interagency agreement annually

## **Common Competencies Among Agencies and Schools**

There is a common misconception about competencies that support students with disabilities in transition or transition planning. The misconception is that a “set” of competencies exist that, once mastered, allows agency and education professional and community members to automatically be successful with each person with whom they have contact. Rather, there is a pool of competencies that can assist students to become gainfully employed at work and that can enhance students’ quality of life.

Ten key competencies are presented below. The competencies are not in priority order. They are provided to suggest to interagency team members the range of skills needed by people who support students in the transition process.

1. The ability to represent a dream and vision of a community which empowers people with disabilities to become contributing members of the community and a community in which people understand what is important in the lives of people with disabilities.
2. The ability to validate the concerns and fears of family members of students with disabilities and learn from their insights.
3. The ability to look at a challenge from a new perspective and develop options among team members by using various ways to investigate the challenge.
4. The ability to learn from the past and how to assist and support students in the future.
5. The ability to build in measures of satisfaction for supports from the perspective of the receiver of supports.
6. The ability to facilitate a brainstorming session and summarize, organize, and distribute options to a specific challenge under construction.
7. The ability to communicate successes among community members.
8. The ability to learn from the expertise in other fields and adapt findings to your own experiences.
9. The ability to identify natural supports that exist in one’s community by reading the local newspaper.
10. The ability to investigate the culture of a community by setting and identifying the general atmosphere and customs of specific community environments.

## **Community Interagency Council Roles and Responsibility Checklist**

1. Share knowledge of agency/school with others. Types of persons served and how are services initiated
2. Share resources and strategies to reduce duplication of efforts and service gaps.
3. Identify gaps and barriers in services.
4. Assist with problem solving. Serve as a sounding board for policies, procedures, and innovative ideas regarding transition services.
5. Develop a working partnership with a common goal.
6. Provide networking opportunities.
7. Develop working relationships between the school system and adult service agencies, businesses, community, parents, and students through increased communication and coordination.
8. Provide for shared ownership for the transition process.
9. Identify multiple exit points in curriculum with help of the business community
10. Gather and interpret data on student occupational needs and labor market needs.
11. Ensure that small adult service agencies are given a voice in the transition planning process.
12. Coordinate funding sources in relation to service delivery.
13. Provide the courts with options to incarcerating individuals with disabilities .

**Sample Consent Form**

_____ Youth – Full Name	_____ Date of Birth																				
_____ School Identification Number (optional)	_____ Student/ Case Number																				
The following agencies have my permission to share information for the purpose of helping the student/youth from school to adult services and to reduce paperwork. (Please check or cross out any agencies that you do not want to share information.)																					
<table style="width:100%; border:none;"> <tr><td style="width:30%; border:none;">_____</td><td style="border:none;">County Health Association</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">County Mental Health Association</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">County Developmental Disabilities Services</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">County Department of Social Services</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">County Youth Advocacy</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">County Arc</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">Board of Cooperative Education Services</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">Office of Workforce Development</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">Vocational Education Services for Individuals with Disabilities</td></tr> <tr><td style="border:none;">_____</td><td style="border:none;">Other _____</td></tr> </table>		_____	County Health Association	_____	County Mental Health Association	_____	County Developmental Disabilities Services	_____	County Department of Social Services	_____	County Youth Advocacy	_____	County Arc	_____	Board of Cooperative Education Services	_____	Office of Workforce Development	_____	Vocational Education Services for Individuals with Disabilities	_____	Other _____
_____	County Health Association																				
_____	County Mental Health Association																				
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_____	County Arc																				
_____	Board of Cooperative Education Services																				
_____	Office of Workforce Development																				
_____	Vocational Education Services for Individuals with Disabilities																				
_____	Other _____																				
I authorize sharing the following information: (circle yes or no and initial)																					
Yes    No    _____	Identifying Information: name, birth date, gender, race, address, telephone number, social security or identification number, disability, type of services being received and name of agency providing services to me or the individual named above.																				
Yes    No    _____	Case Information: the above identifying information, plus medical and social history, treatment/service history, psychological evaluations, individual education plans (IEPs), transition plans, vocational assessment, grades and attendance, and other personal information regarding me or the individual named above. Information regarding the following shall not be released unless initialed below: _____ HIV AIDS related diagnosis and treatment _____ Substance abuse diagnosis and treatment																				
I understand that this Consent for Release of Information expires 180 days from the date it is signed (*). I also understand that I may cancel this Consent for Release of Information at any time by stating so in writing with the date and signature. This does not include any information being shared between the time that I give permission to share information and the time that it was cancelled.																					
This consent expires on, _____, 20____																					
_____ Signature of person authorized to consent	_____ Relationship to youth																				
_____ Signature of Individual	_____ Date																				
_____ Witness/ Agency Representative	_____ Date																				
* This release of information will expire in 90 days for information concerning substance and alcohol abuse diagnosis and treatment																					

**I understand that my signing or refusing to sign this consent will not affect public benefits or services that I am otherwise entitled to receive.**

**Case Information:**

If the release authorized the disclosure of CASE INFORMATION, consent to such disclosure may include the following types of information, if they are in the files of the agency releasing the information.

1. **Educational records**, including but not limited to the results of diagnostic evaluations, teacher observations, vocational assessments, grades, attendance, individual education plans, and transition plans.
2. **Medical records**, including but not limited to the results of physical and mental examinations, diagnosis of physical and mental disorders, medication history, physical and mental health status and history, summary of treatment or services received, and summary of treatment plans and treatment needs.
3. **Psychological and medical testing**, including but not limited to an IQ tests or other tests, of cognitive or emotional or mental status, and any reports of physical tests such as x-rays, CT scans, diagnostic blood testing, or other results.
4. **HIV, AIDS, and AIDS related diagnoses and test results**, including information about treatment planned and received. (This information will be disclosed only if page 1 is initialed with permission.)
5. **Drug and alcohol abuse diagnoses and treatment**, including but not limited to the results of evaluations, diagnoses, treatment and services received, treatment plans and treatment needs. (This information will be disclosed only if page 1 is initialed with permission.)
6. All records of services provided by the \_\_\_\_\_ County of Children Services except child abuse investigation reports.
7. **Second-hand information** may require an additional release of information from the original source.

**TO ALL AGENCIES RECEIVING INFORMATION DISCLOSED AS A RESULT OF THIS SIGNED CONSENT:**

1. If the records released include any information of any diagnosis or treatment of drug or alcohol abuse, the following statement applies:

Information disclosed pursuant to this consent has been disclosed to you from records whose confidentiality is protected by Federal law.

Federal regulations (42 CFR Part 2) prohibit you from making any further disclosure of it without the specific written consent of the person to whom it pertains, or as otherwise permitted by such regulations. A general authorization for the release of medical or other information is NOT sufficient for this purpose.

2. If the records released include information of an HIV-related diagnosis or test results, the following statement applies:

This information has been disclosed to you from confidential records prohibited from disclosure by state law. You shall make no further disclosure of this information without the specific, written, and information released from the individual to whom it pertains, or as otherwise permitted by state law. A general authorization for the release of medical or other information is NOT sufficient for the purpose of HIV test results or diagnoses.

**Agencies and/or individuals added to the release will be apprised of the \_\_\_\_\_  
County Local Interagency Transition Team.**

## **Appendix E -Planning for the Future: Questions to Ask**

The first step in career planning is to think about your future, the entire future.

### **Start with a vision or dream.**

1. Imagine your self five, ten, or twenty-five years from now. Write or tell about what you see.
2. Develop a mission statement for your life.
3. When you dream of the future, what are your dreams about?

### **Get help with long-range planning.**

#### **Assess your strengths**

Figuring out what you would like to do with your life gives you initial direction with education, where to live, and job possibilities. This will involve determining skills are your strengths. Some questions to guide you are:

1. What did you do that you are proud of accomplishing?
2. What do your parents and teachers always compliment you on doing?
3. State at least one skill or task that you can do well.
4. What have you achieved?
5. What are some things that you have done that have made a difference?
6. What have you done to earn money?
7. What volunteer activities have you participated in doing within the community?

#### **What interests you?**

Ask friends, neighbors, teachers, or other important people in your life how they would describe your strengths. Some questions might include:

1. What do you think I do well?
2. What are strengths that you have noticed about me or that I have?
3. When do I seem really happy?
4. What have I done that you have appreciated?

#### **More strengths.**

All strengths are important, no matter how big or how small. Make sure you list all the things you can do well.

### **What do you do that people will pay you to do for them?**

Now that you have determined what you are good at, the next step is to determine what skills you have that people will pay you to do for them. Some ways to figure out what jobs will match your strengths are:

1. Take classes in one or more of your interest areas.
2. Join clubs for people who share your interests.
3. List people you know who are working and have similar strengths as you.
4. Look through lists of types of jobs to find one or may that may be of interest to you.
5. Read "Help Wanted" ads to see what jobs use your skills.

6. Take a strength and think of the possibilities of you and this strength.
7. Go to trade association meetings in area that may interest you.
8. Do volunteer or part-time work in an area that may be of interest to you.
9. Daydream of the perfect job for you. What were your daydreams?

**What are your good work habits?**

Make a list of your habits that may be valued by an employer.