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Overview of NSTTAC’s Transition Institute Toolkit

The National Secondary Transition Technical Assistance Center (NSTTAC) developed this Transition Institute Toolkit from precise information for designing, planning, and implementing this capacity building approach that integrates professional development, data-based decision making, technical assistance, and strategic planning through a collaborative process, as with NSTTAC’s National Secondary Transition State Institutes, this strategy provides opportunities for stakeholder teams to increase their general knowledge of evidence-based practices, learn about implementation of these practices in a variety of settings, and to develop plans to adapt the practices to their specific context. This process is facilitated by the use of a planning tool through which teams review student outcome, implementation, and effectiveness data; determine their strengths and needs; and develop plans to address their needs.

Through their participation in NSTTAC Capacity Building Institutes many states include a transition institute as a key strategy in their capacity building plans. In doing so, state teams must strive to clearly articulate the purpose of their intended outputs, outcomes, and evaluation approaches. This toolkit is a practical guide for state leaders to assist with planning and implementing the Transition Institute Model (TIM). It is designed to provide you with descriptions of essential components of the TIM, detailed checklists, and resources for use in planning and enhancing your institute.

In this first section, we provide a description of the TIM, its components, and strategies for determining your institute’s focus, identifying your local stakeholder teams, scheduling your institute, determining the location and capacity of your facilities, and selecting keynote and breakout session speakers. In subsequent sections, we provide detailed resources for planning specific institute components, including examples of state institute agendas and team planning tools, facilitator preparation materials, content resource scheduling, and institute evaluations. Our suggestions are based on implementation of dozens of transition institutes and evaluations of their outcomes. These materials are presented in a notebook format to enable you
to copy resources as you need them and to add materials as they become available – materials from NSTTAC, other states, and your own experiences!

**Key Elements of a Transition Institute**

Over the past 15 years, the transition institute model (TIM) has been used effectively to promote state and local planning focused on improving outcomes of students with disabilities. This model includes several key components, illustrated in Figure 1, that facilitate knowledge development, team building, and strategic planning.

![Evidence-Based Transition Education and Services](image)

**Figure 1. Key components of the transition institute model**

Generally, a transition institute spans three days, and is focused on a specific topic determined by stakeholder input and data review. The institute model presented here applies *The Taxonomy for Transition Programming*, developed by Dr. Paula Kohler and colleagues, as the heuristic for organizing concepts about transition education and services. The idea is to focus on evidence-based practices and increase capacity to implement such at the local level. The keynote presentations and breakout sessions are designed to provide both general and specific information and examples about the focus topic(s). Facilitated team meetings, conversations with content resources, and a team planning tool assist participants to review their practices, programs, and outcomes and then apply the content information to their local context. The teams leave the institute with a plan to address their local needs.
Planning Your Transition Institute

Planning for a transition institute ideally begins at least one year prior to the event (see Timeline in Section 3). Setting the date early helps you identify optimal facilities and schedule speakers whose availability may become limited as time passes. Following are strategies for planning specific components of your institute.

Scheduling Your Transition Institute

As mentioned previously, a typical institute spans two to three days and planning needs to begin far in advance of the event. The institute length needs to be long enough to foster knowledge development and allow meaningful team planning. The length of time you need will influence when you hold the institute. Several other factors influence these decisions as well: your state’s culture, availability of a facility to host the institute, availability of educators and other stakeholders, testing schedules, vacation breaks, distance to the location, and other variables that effect attendance of your target participants. Some states have found they gain better attendance from educators during the school year. Others find that summer works best, but they schedule the institute to occur shortly after school’s out to avoid conflict with summer school, vacations, and/or summer jobs. As soon as you set the date, send out a “save the-date” notice to alert your participants and allow them to begin work on attendance details. Key questions to consider when planning your institute include the following:

- Are substitute teachers available to cover classrooms if the institute is held during the school year?
- Who will pay for the substitute teacher costs?
- Will national, state, and/or local testing be held during the time you want to hold your transition institute?
- How much time are teachers allowed away from the classroom for the purpose of professional development?
- Are there other professional development events with which you want to avoid a scheduling conflict?
If you plan on having family members and/or students participate, what time of year facilitates their attendance (e.g., not having to sacrifice work or school time)?

**Location and Capacity of Transition Institute Facilities**

The choices regarding location and facility are usually interdependent, as many states have a limited number of facilities that will accommodate an institute-type event. If you have a choice, consider a location with good transportation access and one that offers a climate and amenities conducive to combining hard work and after-hour relaxation! Scheduling the facility is typically one of the first action items in your planning agenda, especially if there is limited capacity in your state. Begin your selection process approximately one year in advance!

Your chosen facility must be able to accommodate the number of participants and activities typically associated with a transition institute. We’ve participated in state institutes that range in size from 200 to almost 400 participants! High schools, career tech centers, hotels, and conference centers have all been used successfully to host transition institutes—each offers its own benefits and disadvantages. If you choose a facility other than a hotel, adequate lodging should be available close by. Success factors include good lighting, sound, and climate control systems; accessible large and small meeting rooms; and adequate food service and team meeting space.

Specifically, you need a facility that can accommodate a large audience for the opening remarks and keynote presentations, for lunches and any networking sessions with vendors, and for the end of the transition institute report-out and wrap-up session. You also need several rooms in which to hold breakout sessions, the capacity of which depends on how many sessions occur simultaneously and your total number of participants. Often, the large group rooms (e.g., ballrooms or auditoriums) have collapsible walls and can be “broken down” quickly into smaller rooms.

Team meeting rooms and spaces are also essential. Certainly, the number and size of your teams influence how many and how much team planning rooms/space you will need. Four medium-sized teams can make use of the
typical large ballroom, but if at all possible, it is desirable for each team to have their own unique space in which to work. Also consider the materials with which each team will work (e.g., notebooks, computers, flip-charts, etc.) when determining your team meeting space needs.

The Transition Institute Focus: Evidence-Based Transition Practices

The overall purpose of the transition institute is to improve post-school outcomes of students with disabilities by improving local capacity to implement evidence-based transition education and services. Data-based decision making drives the determination of the institute focus, as well as the institute process itself.

Identifying the Transition Institute Content

With this purpose in mind, content for the transition institute is determined by a team of individuals who understand the needs of the potential participants. Typically, this team consists of individuals responsible for transition-related capacity building and/or accountability and other representatives from the state and local level who represent key participant groups. To identify needs, the planning team conducts professional development needs assessment through on-line, face-to-face, or other information collection procedures. Needs are also based upon accountability data collected by your state department of education’s office for exceptional children, such as data in the State Performance Plan and Annual Performance Reports (SPP/APR) (e.g., SPP/APR Indicators 1, 2, 13, and 14). Many states study the accountability results, identify systemic issues in compliance and research-based practice implementation, and build their transition institute around those issues.

Several states have chosen to focus on specific categories within the Taxonomy for Transition Programming, more fully described below, as it represents a framework of evidence-based transition practices, including
the SPP/APR Indicator 13 components. Others have focused more narrowly on practices within a taxonomy category. As the state teams with whom we have worked use the Taxonomy as an institute framework, the team planning tool examples herein also parallel the taxonomy practices.

**Taxonomy for Transition Programming**

The *Taxonomy for Transition Programming* (see Section 2) is an applied framework of secondary education practices associated with improving post-school outcomes of youths with disabilities. This taxonomy emerged from several investigations that reviewed research literature (Kohler, 1993), evaluation studies (Kohler, DeStefano, Wermuth, Grayson, & McGinty, 1994), and model transition project outcomes (Rusch, Kohler, & Hughes, 1992). Through a three-phased research process, effective practices identified through each of these investigations were synthesized and organized into five categories: (a) student-focused planning, (b) student development, (c) interagency and interdisciplinary collaboration, (d) family involvement, and (e) program structure and attributes (Kohler, 1996). The practices included in the model were evaluated using criteria proposed by Peters and Heron (1993) to determine “best practices”. They are associated with positive student outcomes, have a sound basis in theory, are supported in the literature, and were socially validated by a national group of transition experts. Empirical support exists for particular strategies for implementing practices in the taxonomy (Kohler, 1996).

The practices represented and described in the taxonomy represent concrete strategies that operationalize a transition perspective of education and represent a consumer-oriented paradigm built upon student and family involvement and students’ self-determination. The Taxonomy represents the things we need to do to provide transition-focused education. A brief description of each category of practices follows.
**Student-Focused Planning**

Student-focused planning practices focus on using assessment information and facilitating students’ self-determination to develop individualized education programs based on students’ post-school goals.

**Student Development**

Student development practices emphasize life, employment, and occupational skill development through school-based and work-based learning experiences. Student assessment and accommodations provide a fundamental basis for student development which results in successful transitions.

**Interagency Collaboration**

Interagency collaboration practices facilitate involvement of community businesses, organizations, and agencies in all aspects of transition-focused education. Interagency agreements that clearly articulate roles, responsibilities, communication strategies, and other collaborative actions that enhance curriculum and program development foster collaboration.

**Family Involvement**

Family involvement practices are associated with parent and family involvement in planning and delivering education and transition services, including facilitating such involvement. Family-focused training and family empowerment activities increase the ability of family members to work effectively with educators and other service providers and vice-versa.

**Program Structures and Attributes**

Program structures and attributes are features that relate to efficient and effective delivery of transition-focused education and services, including
attributes of a school that provide the framework for a transition perspective. By operating from the transition paradigm, schools put in place those structures and policies that reflect the notion that outcomes and activities of 100% of their students are important.

**Determining Targeted Outcomes**

Subsequent to identifying the general focus of the institute, you must stop to ask an important question: “What are our intended or anticipated outcomes for this institute?” Before you can begin to select specific speakers to provide the content, it is critical to articulate both short and long term outcomes expected as a result of this capacity building strategy. That is, you must identify and communicate what you expect to have happen in the districts and schools who engage in the institute process. Thus, in addition to your stakeholder teams leaving with new or expanded knowledge, stronger networks, excitement, and a good plan for improvement, they must also leave with an understanding that the institute is more than a process, but rather a strategy intended to produce specific results. Does the state team expect an institute focused on student-focused planning to result in an increase in student engagement in their transition planning; or a focus on student development to ultimately increase students’ academic, social, life, or work skills as well as the number of students employed or enrolled in college at the time of school exit? Understanding what you expect to happen as a result of this capacity building strategy is essential to planning and implementing a successful institute.

Likewise, your institute stakeholder teams must also understand that their engagement in this experience should result in specific outcomes in their local contexts, rather than just a set of transition-focused activities. If not, then the state is unlikely to achieve the desired impact. Is their plan for a transition fair that includes students, families, and agency representatives designed to increase the number of students who receive specific services that subsequently improve their college and career outcomes? If their plan is to update their memoranda of understanding (MOUs) between agencies and schools, will the number of students served increase? Will their plans to offer a transition class for all their high-school age students increase student competence?
Once you articulate your short- and long-term goals for the institute, you can move to the next important steps: (a) evaluation planning to measure accomplishment in meeting your institute objectives and (b) planning specific content and identifying speakers to deliver it.

**Delivering the Transition Institute Content: Keynotes, Breakout Sessions, and Content Resources**

The institute content, delivered through keynote and breakout presentations, flows from the primary institute focus and identification of specific targeted outcomes. Keynote and breakout presenters are charged with delivering both general and specific information about your content focus. It is helpful for these presenters to use electronic projection of their information and make either electronic or paper handouts of their materials available to participants. In addition, these presenters typically serve as content resources during the facilitated team meetings, providing an opportunity for teams to ask specific questions and gather advice about adapting the content information to their local context. A checklist for choosing presenters follows the discussion of each session type.

**Keynote Presentations**

Traditionally, a keynote presenter kicks off the institute, providing the participants with motivational success stories or directives. Institutes may include one keynote presentation, although having a keynote presenter or panel each day can also be useful for creating the framework and inspiration for successful team work. Keynote speakers are typically used to provide general awareness information or motivation regarding a specific topic, and should be skilled in addressing large groups.

The keynote introduces the topic by providing a broad overview of the concept. For instance, if your institute focus is student-focused planning practices, keynote speakers could broadly introduce the following topics: IEP development, student participation in the IEP process or transition process,
and/or planning strategies. Keynote presentations usually last an hour or less. Some planning teams also try to include keynote presenters who can update participants on reauthorized legislation. Keynote presentations are efficient as they can deliver information to all your participants at once; however they are usually limited in providing hand-on application information.

**Breakout Presentations**

In contrast to keynotes, breakout sessions are chosen to provide information about specific transition practices, mandates, or products—they consist of content, strategies, and application about the institute topic(s). Breakout sessions represent the “how to” content, and presenters typically spend time describing interventions, barriers to implementation, supports they have received helpful in their implementation, and timelines for implementation. During an institute focused on student-focused planning for example, breakout session presenters might describe and illustrate specific student involvement strategies, specific applications of transition-related assessments, and/or ways they’ve structured IEP meetings to engage students and their families. When selecting breakout presenters, include those who address the variety of contexts represented by your participants, such as a range of student abilities, geographical and cultural diversity, and knowledge level of the participants. Selecting exemplary local program presenters to conduct breakout sessions is a great way to showcase and model their work.

The number of rounds of breakout sessions provided in the institute, as well as the number of sessions within a round, depends on the capacity of your facilities and length of the institute. To provide an opportunity for demonstration, questions, and answers, these sessions should be at least an hour in length. The more sessions you provide, the greater content and range of content available to your participants. Create a balance so that team
members can access a variety of content that meets their various needs, but so that your capacity (room size, equipment, etc.) is not stretched too thin. One strategy is to repeat specific sessions you know will be popular or that you want all participants to attend. Prior to the breakout sessions, team members should determine what content is needed to improve their planning and teamwork, and “assign” participants to selected sessions; thus they can cover a variety of content which they bring back to their team discussions.

Content Resources

The availability of individuals serving as content resources to meet with individual teams during team planning times is another important institute characteristic that facilitates application of content to the local context. Thus, when considering keynote and breakout presenters, determine their availability to participate during the entire institute and willingness to meet with individual teams. Other potential content resources include state education or transition service agency personnel, national or state TA center staff, parent training center personnel, and/or anyone else who can contribute to team knowledge or planning.

When developing your institute agenda, schedule team meetings with enough time to accommodate at least a couple of brief content resource visits (e.g., 20 minute visits). The process works like this: (a) team members bring back information to team meetings from keynote and breakout sessions; (b) teams identify specific content they’d like to consider further in their discussions and make a list of specific questions regarding the content; (c) using the forms provided (see Section 8), the facilitator submits a request for one or more
content resources for the next team meeting; (d) institute staff prepare and distribute a schedule for each content resource and team, designating appointment time; and (e) at the designated time, team members and the content resource(s) use the list of questions to frame a brief discussion.

**Key Aspects to Consider when Choosing Presenters:**

- In-depth experiences or knowledge regarding institute focus topic
- Public speaking experience or ability
- Ability to describe application of practice to participants’ context
- Ability to motivate audience
- Availability to attend entire institute
- Availability to serve as a content resource
- Ability to serve as a model for participants

**The Transition Institute Process**

Several aspects of the Transition Institute Model process distinguish it from a conference and the standard institute. The process is designed to increase participants’ knowledge, as well as facilitate application of that knowledge at the local level. The institute agenda, stakeholder teams, facilitated team meetings, team planning tool, and reporting out session are fundamental components of this process.

**The Transition Institute Agenda**

The transition institute agenda will serve as a guide for the participants, presenters, and event personnel, and weaves the institute components together to form an effective capacity building event. A well organized agenda can eliminate many questions and much confusion during the institute. Designing the agenda assists the planning committee to think about what
needs to be accomplished. Provided ahead of time, even a skeletal agenda allows participants to know what to expect and how to prepare. The final agenda should list keynote presentations, breakout sessions, and team meeting times as well as breaks, lunch times, and other networking opportunities. The agenda should also acknowledge fiscal and content contributors.

When developing the agenda, give careful thought to the arrangement of keynotes, breakout session rounds, and team meeting times. As illustrated in the sample agendas provided in Section 4, team meeting times and/or keynote presentations can be combined with lunch breaks, although participants will still need some stretch time. An important consideration is to schedule keynotes and/or breakout sessions prior to team meeting times so that participants have content to consider during their meeting. Also, team meeting times should be long enough to allow for the discussion, reflection, and planning tasks outlined for each session (see Section 6).

**Stakeholder Teams**

Stakeholder teams represent the fundamental participation “unit” in the transition institute model. The team concept is one major difference between a typical conference, in which participants attend as “individuals” and the institute model, which fosters teamwork. Again, the institute is designed to increase knowledge of team members and facilitate the application of that knowledge in their local context. Essential to this process is team membership that includes educators and other individuals with diverse knowledge who can affect or modify policy, initiate change, and take responsibility for implementation of
the team’s plan subsequent to the institute. When you establish registration and communicate aspects of your institute, it is essential that the concept of team membership is emphasized. Individuals should not register unless they are part of a team.

Teams participating in the institute typically represent a variety of organizational units, depending on the state and local education or service agency structures. For example, a team might represent a particular school, local school district, or regional service district. In some cases, teams represent a particular vocational rehabilitation service area or a career and technical education catchment region.

Depending on the unit represented, team size generally ranges from two to over a dozen members. Ideally, teams are not so small that the perspectives represented are limited or that the ability to carry through with implementation is marginalized. Team size should not be so large that progress and meaningful planning during the institute are impeded. Teams that range in size from five to nine members who represent various responsibility levels and roles generally offer the diverse perspectives desired, while maintaining a practical group size.

Some state leaders specify required team members, while others leave that as a local decision. Transition educators typically include special education teachers and teacher consultants, general education teachers, and career and technical education teachers. Transition service providers can be, but are not limited to the following entities: community mental health, independent living centers, employers and other business partners, vocational rehabilitation and other community rehabilitation organizations, Goodwill Industries and other employment service providers, public health services, correctional services, and social services. Family members and students with
disabilities should always be invited to participate in these activities as they are the recipients of the transition programs and services on which the institute is focused. Administrators responsible for program and fiscal decisions are also key members of the team.

Team preparation for the institute is also important. There should be no surprises when the team gathers for their first meeting. Various strategies are effective for preparing your stakeholder teams to participate in the institute, including the following: (a) holding a pre-institute meeting or conference call, (b) providing each team member with a plan from a previous institute, (c) providing the draft agenda, and/or (d) gathering relevant data to include in the team meeting sessions.

In Section 3 is a checklist to help identify potential institute team members. Also in this section, we include a list of potential information and evaluation data sources useful for team planning sessions. Edit this list as needed to align with your institute focus.

**Stakeholder Team Meetings**

The team meeting is another important feature that distinguishes an institute from a conference; these meetings allow members to process the institute content and apply it to their local context. During team meetings, through use of the team planning tools, members use their local data to review the quality of their transition education programs and services, determine and prioritize their needs, and plan strategies to address their needs by applying and adapting the institute content.
The team planning tool provides a structure for their discussions and the team facilitator guides them through the review and planning process. Specifically, the team meetings are designed to help the team reflect on the degree to which they are implementing the practices described, identify and review data regarding the extent and quality of their interventions, identify specific issues that may be limiting their effectiveness, and to develop a plan that addresses local need.

In the institute agenda, specific consideration should be given to the number and length of the team meetings, so that teams may accomplish their work and the institute’s intended outcomes realized. In addition, when selecting the institute focus, that focus should be narrow enough so that participants are able to complete assessment and planning regarding the topic. When the institute focus is too broad, teams have difficulty gathering and reviewing the appropriate data and completing the planning process within the institute’s timeframe, which results in superficial rather than substantive outcomes.

An institute includes a minimum of three team meetings. Team meeting locations and facilitator assignment should be distributed with the transition institute agenda and other materials during the registration process. In Section 6, we provide an overview of team tasks that occur during a typical transition institute. The facilitator uses this overview as an agenda and an organizer for the team meetings, and prepares materials accordingly.

**Team Planning Tool**

Our team planning tools parallel the Taxonomy for Transition Planning and have been developed to address the taxonomy area that is the focus of the institute. Field-tested for over 15 years, they are designed to assist stakeholder teams through the process to identify what is currently occurring in their school or
district, summarize their strengths and needs, and develop an action plan. The completed tool also provides a context for ongoing conversation, progress assessment, and goal attainment throughout the school year.

Specifically, our team planning tools (see Section 5) provide an overview of the content focus and a description of the taxonomy practices included in that focus. Section 1 of the tool includes rating scales participants use to assess their practice implementation and data quality. Reflective questions prompt participants to consider detailed aspects of the specific focus area and go beyond “yes/no” answers to provide substantive formative and summative information. Section 2 helps teams summarize their findings and synthesize their strengths and needs. Section 3, the action plan, consists of goals, timelines, persons responsible, outcomes, and indicators of success. The examples included in Section 5 of this toolkit illustrate tools with both narrow and broad foci.

**Team Facilitators and Their Preparation**

The transition institute model uses the active facilitation approach to assist teams in assessment of current practices and outcomes, determination of needs and priorities, and development of action plans. This approach also helps the team problem solve. The role of the facilitator in this model is to serve in an unbiased, neutral role—a neutral servant to the team. The facilitator is an advocate for the institute and team planning process, and a promoter who assures the team makes progress during their team meetings.
The Facilitator Role

Team facilitators are responsible for assisting teams to accomplish the team meeting tasks established for each day. In a two and a half day transition institute, teams typically meet four to five times. To help facilitators keep their teams on target, we prepare a detailed outline of team meeting tasks, facilitator roles, meeting agenda, and materials and flipcharts needed (see Section 6). Facilitators are responsible for keeping the team on track as they progress through the planning tool, but they also help set the mood of the team meetings, answer questions, or help navigate roadblocks.

Choose your facilitators carefully – it’s an important job! Some states have identified team leaders to direct the work of the team during the team meetings. In most cases, however, they have all come back to the model of using neutral facilitators. The advantage is that the facilitator can better equalize participation across members; the neutral facilitator has no specific stake in an agenda, does not present hierarchical, supervisory barriers, and does not bring a history with the team that may inhibit collaboration.

The facilitator should have knowledge about transition education and services and some experience working with diverse groups. State special education or transition consultants, higher education faculty, state rehabilitation or other service agency staff, national or state TA providers, and parent trainers generally make good transition institute facilitators. Do not choose individuals as facilitators if you want them to serve as content resources.
**Facilitator Preparation**

To prepare facilitators for their work, we use the *Facilitator Preparation Manual* (Bowerman, Kohler, Coyle, Gøthberg, & Shadrick, 2010) (see Section 7). Persons knowledgeable about active facilitation practices should provide the preparation for the facilitators and be available to meet with the facilitators each day to debrief after the daily sessions. Facilitator preparation is completed prior to the start of the institute, the day or even weeks before. The preparation provides facilitators with comprehensive information about the concept of the institute, the team planning tool, facilitation strategies, expectations of the facilitators and stakeholder teams, and other important aspects of the institute and their work. The facilitators are also provided with detailed agendas and task lists that will assist them with preparing their flipcharts and materials for the institute’s work. In Section 7 we provide examples of facilitator preparation agendas, their roles and meeting tasks for the associated institutes, and a facilitator assignment schema.

**Facilitator Strategies**

The *Facilitator Preparation Manual* (Kohler et al., 2010) provides detailed descriptions of the facilitated team process, including strategies for leading group discussions, establishing small work groups (e.g., school teams within a regional or district team), managing conflict, using flip charts, understanding team formation stages, and other information relevant to the facilitator’s job. Successful facilitation strategies include establishing ground rules at the first team meeting, identifying an official recorder to manage the team planning tool, fostering the input of all team members, preparing materials in advance, and following time schedules. In addition to the facilitator preparation activities, it is important to support the facilitators throughout the institute by helping them problem-solve, gather resources, and de-brief at the end of the day. The de-briefing focuses on processing team input regarding
“what worked and what didn’t,” as well as any other issues or suggestions facilitators may have—it’s a great context in which we learn from them, and they learn from and support each other.

Specifically, to help manage the facilitation process, we emphasize the use of flip charts, as they provide a visual, efficient way to organize the meeting agenda and document discussions. Because facilitators display their flip charts in each team meeting throughout the institute, they provide a history of the team’s work. A facilitator can edit his/her flip charts easily using different colored markers and re-order the pages in response to changing priorities. By documenting participants’ ideas on a flip chart, the facilitator acknowledges that input and reinforces active participation. We also use specific flip charts to display the team meeting agenda, ground rules, and parking lot. Each facilitator will need a pack of flip charts, markers, tape, some sort of easel, and time in advance to prepare.

**Report Outs**

At the conclusion of the institute, stakeholder teams briefly present information about their work at the institute. This is an important opportunity for teams to showcase their hard work, and may include an overview of their needs and the goals and activities established for the coming year. The report out session also allows them to learn information from others and to gather new ideas. Teams prepare for their report out during their last team
meeting. Following we describe four ways of conducting the report out session.

**Whole Group**

Report outs with the entire group need to be well-organized. Most teams are excited to share their hard work and the goals they have chosen for the next school year. Knowing this, it is important to provide a structure that allows everyone to speak, but to do so within a precise timeframe. At the facilitator debriefing meeting the night before the report out session, each facilitator identifies how many teams will be reporting out. The amount of time allocated for each team’s presentation is typically determined by dividing your block of time for reporting out by the number of teams. Thus, teams are given an exact amount of time (e.g., 90 seconds, 2 minutes, etc.) in which to deliver their summary. All teams are encouraged to participate and are often excited to do so. Institute organizers are responsible for keeping everyone on time to avoid long report-outs, and use such gimmicks as whistles or horns to signal a team’s reporting time has expired.

At the last team meeting prior to the report out, teams prepare a brief presentation about their goals for the next school year. This presentation can be straightforward, reading from a flipchart, or a creative performance, such as a poem or skit. Some teams will bring props or write a rap about what they learned at the institute. In preparation for the reporting out session, the facilitator signs the team(s) up on a sheet of paper or overhead transparency posted at the registration area; this list is displayed at the report out session, so teams can see when they are “up, on deck, or in the hole” to present.
Small Groups

Instead of having all the teams in one large room for the report out, dividing teams into groups by their geographic region is another option. This process is similar to the whole group report out, but with smaller groups in different rooms. Having teams grouped by region allows for everyone to present their goals, but in a shorter timeframe. Also, participants gain knowledge about what is happening in their geographic area. Institute organizers can use this format to help develop specific geographical collaborations and/or approaches.

Gallery Walk

Another option to allow teams to share their accomplishments is a gallery walk. In this approach, teams prepare a flipchart sheet with their goals for the next school year or a summary of their work. The sheet is displayed in an area large enough to accommodate all participants – a hallway or series of rooms. After all of the sheets are displayed, the participants walk through the halls obtaining ideas and learning what other teams are working on. This is the most time efficient approach for reporting out, but it limits creativity and interaction.

FLIP Videos

The use of a FLIP video camera to record each team’s summary before the final session of the institute has emerged as a new option for the reporting-out process. As teams approach the conclusion of plan development, a member of the institute planning team records the team’s or its spokesperson’s brief summary of their plan. This approach is often less stressful for team members and can be an efficient method for collecting brief synopses of teams’ action plans. Once all of the FLIP videos are recorded, they are compiled into one
file that will play at the final large group session. This is not the most interactive method, but attendance at some final group sessions has increased, presumably due to reducing the stress some experience with “live” reporting.

The Transition Institute Evaluation

Formative and summative evaluations are fundamental elements of a continuous improvement model, and an institute evaluation is critical for planning and preparing the next institute. Thus, at the conclusion of the event, participants are asked to complete an evaluation of the institute. We provide paper and online formats. Evaluation of the expected outcomes, organizational aspects (e.g., facilities, registration), presentation content and materials, and overall perspectives of the institute should be included. The evaluation can illuminate flaws in the facility or other issues that the organizers may not have noticed. Additionally, the evaluation provides critical information about presenters and other aspects of the institute that will influence the way the next institute is planned.

Facilitator preparation is evaluated at two points in time: (a) at the conclusion of the facilitator preparation, using the “what worked and what didn’t process”; and (b) after the institute, using paper and/or online instruments, to gather perspectives of the facilitators subsequent to their experiences. This retrospective perspective provides information useful for selecting and preparing your facilitators for the next institute.

In Section 9, we provide examples of institute evaluations, including evaluations of the facilitator preparation.
Posters

Another avenue for collecting data on the progress teams have made on their plans over the year is a poster competition. We strongly recommend that states or local teams bring a poster to share that includes their outcomes, outputs, and evaluation data from their state plan. For the national institute, we host a networking reception the first night of the institute. At this reception, at least two staff from the planning team review the posters and score them using a rubric (see Section 9). This rubric is included in the correspondence with the states prior to the institute to assist with their poster preparation. An additional benefit of the poster reception is the chance for teams to highlight their progress and student outcomes as a result of their strategic planning.

Transition Cadre Meetings

As an institute planning team, conducting follow up meetings with teams to see how they are doing with their plans is critical. A strategy of this capacity building model is holding cadre meetings (a.k.a. check and connect meetings) throughout the year. Most states will have at least one meeting, while others find it more beneficial to meet with their teams twice. These cadre meetings allow for teams to come together, evaluate their progress on their plans, receive content in new or renewed areas, and for the institute team to measure and collect data on their overall objectives (see Section 10 for examples of agendas, update tools, evaluations).

Cadre meetings are generally held over one or two days. They can be held in one location that everyone comes to or held in regional areas across the state. These meetings consist of professional development activities, content sessions, strategic plan progress updates, networking, and state updates. Some states limit participation to two team members while other states may have entire teams attend.
Bibliography


Kohler, P. D., & Troesken, B. (1999). *Improving student outcomes: Promising practices and programs*. Champaign, IL: Transition Research Institute, University of Illinois at Urbana-Champaign.


Section 2

Taxonomy for Transition Programming
Taxonomy for Transition Programming

A Model for Planning, Organizing, and Evaluating Transition Education, Services, and Programs

Paula D. Kohler, Ph.D.

WESTERN MICHIGAN UNIVERSITY
and
TRANSITION RESEARCH INSTITUTE
University of Illinois at Urbana-Champaign
The TAXONOMY for TRANSITION PROGRAMMING

- Student-Focused Planning
- Family Involvement
- Student Development
- Program Structure
- Interagency Collaboration

The TAXONOMY for TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation
- Planning Strategies

Student Development
- Life Skills Instruction
- Career & vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Program Structure
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

STUDENT-FOCUSED PLANNING

IEP Development
— Options identified for each outcome area or goal
— Post-secondary education or training goals and objectives specified in the IEP
— Vocational goals and objectives specified
— Community-related and residential goals and objectives specified (e.g., voting)
— Recreation and leisure goals and objectives specified
— Educational program corresponds to specific goals
— Goals are measurable
— Personal needs are addressed in planning (e.g., financial, medical, guardianship)
— Specific goals and objectives result from consumer choices
— Progress or attainment of goals is reviewed annually
— Responsibility of participants or agencies specified
— Evaluation of participant fulfillment of responsibilities

Student Participation
— Planning team includes student, family members, and school and participating agency personnel
— Assessment information is used as basis for planning
— Transition-focused planning begins no later than age 14
— Meeting time adequate to conduct planning
— Preparation time adequate to conduct planning
— Planning meeting time and place conducive to student and family participation
— Accommodations made for communication needs (e.g., interpreters)
— Referral to adult service provider(s) occurs prior to student’s exit from school
— Planning team leader identified

Planning Strategies
— Self-determination facilitated within the planning process
— Planning decisions driven by student and family
— Planning process is student-centered
— Student involvement in decision making
— Documentation of student interests and preferences
— IEP involvement training for students
— Career counseling services provided to student
— Student self-evaluation of process

**STUDENT DEVELOPMENT**

**Life Skills Instruction**
— Leisure skills training
— Social skills training
— Self-determination skills training, including goal setting and decision making
— Self-advocacy skills training
— Independent living skills training
— Learning strategies skills training

**Employment Skills Instruction**
— Work-related behaviors and skills training
— Job seeking skills training
— Occupation-specific vocational skill training

**Career & Vocational Curricula**
— Provide career education curriculum
— Provide tech prep curriculum
— Provide cooperative education curriculum

**Support Services**
— Identification and development of environmental adaptations
— Identification and development of accommodations
— Identification and development of natural supports
— Provision of related services (e.g., OT, PT, speech therapy, transportation)
— Use of mentors

Assessment
— Vocational assessment (including curriculum-based and situational assessment)
— Academic, cognitive, and adaptive behavior assessments

Structured Work Experience
— Apprenticeships
— Paid work experience
— Work study program
— Job placement services (prior to school exit)
Collaborative Service Delivery
— Coordinated requests for information (e.g., to parents, employers)
— Reduction of system barriers to collaboration
— Collaborative funding and staffing of transition services
— Collaborative development and use of assessment data
— Coordinated and shared delivery of transition-related services
— Systems information disseminated among cooperating agencies
— Collaborative program planning and development, including employer involvement
— Collaborative consultation between special, “regular,” and vocational educators
— Collaboration between post-secondary education institutions and the school district

Collaborative Framework
— Interagency coordinating body that includes consumers, parents, service providers, and employers
— Formal interagency agreement
— Roles of service providers clearly articulated
— Established methods of communication among service providers
— Student information shared among agencies via established procedures (with appropriate release of information and confidentiality)
— Single-case management system
— “Lead” agency identified
— Designated transition contact person for all service providers

Family Involvement
— Participation in program policy development
— Participation in service delivery
— Involvement in student assessment
— Participation in evaluation of student’s program
— Parents/families exercise decision making
— Parent/family attendance at IEP meeting
— Parents/family members as trainers
— Parents/family members as mentors
— Parents/family role in natural support network

Family Empowerment
— Pre-IEP planning activities for parents/families
— Parents/families presented with choices
— Transition information provided to parents/families prior to student’s age 14
— Structured method to identify family needs
— Parent/family support network
— Child care for transition-related planning meetings (e.g., IEP, ITP)
— Respite care
— Information to parents/families provided in their ordinary language

Family Training
— Training about promoting self-determination
— Training about advocacy
— Training about natural supports
— Training focused on their own empowerment
— Training on transition-related planning process (e.g., IEP, ITP)
— Training about agencies and services
— Training on legal issues

Program Structure

Program Philosophy
— Curricula are community-referenced
— Curricula are outcome-based
— Education provided in least restrictive environment
— Education provided in integrated settings
— Student has access to all educational options (secondary and post-secondary)
— Cultural and ethnic sensitivity in programs and planning
— Flexible programming to meet student needs
— Program planning is outcome-based
— Longitudinal approach to transition (early childhood to adult)

Program Evaluation
— Data-based management system
— Evaluation utilization for program improvement
— Ongoing program evaluation
— Specific evaluation of student outcomes
— Student/family role in program evaluation
— Secondary-level education services needs assessment
— Post-school services or program needs assessment
— Annual evaluation of interdisciplinary policy and procedures

Strategic Planning
— Community-level strategic planning focused on local issues and services
— Regional-level strategic planning
— State-level strategic planning
— Community-level transition body focused on local issues and services
— Regional-level transition body focused on regional/state issues
— State-level transition body focused on regional/state issues

Program Policy
— Adult service systems restructured to include transition-related planning and services as integral components
— Education system restructured to include transition-related planning and services as integral components
— Administrative, school board, and community support for the program
— Program values, principles, and mission are clearly articulated
— Specific and consistent transition-related policies and procedures between and within agency and education participants
— Transition planning program structure and process clearly articulated

Human Resource Development
— Transition practices resource materials available to personnel, families, and employers
— Assigned staff are qualified
— Preservice training on transition practices
— Sufficient allocation of personnel
— Transition-related technical assistance
— Establishment of transition-related personnel competencies
— Ongoing transdisciplinary staff development

Resource Allocation
— Creative use of resources
— Sufficient allocation of resources
— Student/family role in resource allocation
— Resources transferred from sheltered and/or segregated facilities to community-based and/or integrated settings

Section 3

Planning Timeline and Team Preparation Materials

Transition Institute Planning Timeline
Institute Team Planning Worksheet: Detailed Tasks
Potential Transition Institute Team Members Checklist
Transition Institute Preparation
Transition Institute Planning Timeline

10 to 12 Months: Initial Planning for Transition Institute

☐ Identify expected outcomes
☐ Establish possible dates
☐ Determine location
☐ Identify accommodations
☐ Identify target participants
☐ Identify contact person for host facility re: making arrangements for rooms, food, etc.
☐ Identify institute funding sources, including possible participant fee
☐ Determine professional development needs via data review or needs assessment
☐ Determine specific institute focus

6 Months:

☐ Begin agenda development
☐ Identify and invite keynote presenter(s)
☐ Identify and invite breakout presenters
☐ Identify and invite other content experts
☐ Identify and invite team facilitators
☐ Confirm institute location
☐ Confirm accommodations
☐ Set up menus and delivery itineraries
☐ Develop registration – online and/or paper
☐ Send save-the-date notices

4 to 5 Months:

☐ Create final draft of agenda
☐ Create team meeting tasks
☐ Send registration information, including what teams should bring to institute
☐ Create custom-made Taxonomy team planning tool
3 Months:
- Confirm agenda and post on website
- Confirm all presenters and facilitators
- Order facilitator supplies (e.g., flip charts, markers, masking tape, easels)
- Schedule facilitator preparation

1 Month:
- Confirm menus and food delivery itineraries
- Confirm lodging accommodations
- Re-confirm agenda and post on website
- Re-confirm all presenters and facilitators
- Finalize and print team meeting tasks
- Create and print content expert availability sheets
- Finalize and print programs
- Print team planning tool
- Create and print institute and facilitator preparation evaluations
- Call for and collect presenter handouts
- Finalize and assign facilitators to teams
- Finalize and print content resource availability list
- Send facilitator preparation manual
- Prepare and print facilitator preparation agenda and other facilitator prep materials
- Prepare PowerPoint slides and flip charts
- Print institute materials
- Order and prepare USB drives for team meetings with copy of team planning tool and other relevant material

2 Weeks to Last Minute:
- Create and print team meeting room designations
- Make last minute changes to facilitator/team and room assignments, if necessary
- Confirm numbers and other details with facility staff

Post-Institute:
- De-brief with institute planning team
- Compile, analyze, and review institute evaluation data
- Compile, analyze, and review facilitator preparation evaluation data
- Start planning next year’s institute
<table>
<thead>
<tr>
<th>Item</th>
<th>Person / Agency Responsible</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Purchase USB Drives and load team tools</td>
<td>ABLE Tech/Linda</td>
<td></td>
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<tr>
<td>2. Provide extra laptops</td>
<td>ABLE Tech/Linda, CareerTech/Denise, and OSDE/Monica</td>
<td></td>
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<tr>
<td>3. Prepare for and conduct Trainer of Trainers to be held on September 3 from 1:00-4:00</td>
<td>DRS/Marla and Tech Now/Rick</td>
<td></td>
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<tr>
<td>4. Provide and facilitate door prizes</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>5. Develop and Print Evaluations</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>6. Send Tools to Kim electronically</td>
<td>NSTTAC/Paula</td>
<td></td>
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<tr>
<td>7. Send Tools to Kim electronically</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>8. Prepare sign-in sheets electronically</td>
<td>OSDE/Anita</td>
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<tr>
<td>9. Provide Web link to District Data Profiles</td>
<td>OSDE/Kim</td>
<td></td>
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<tr>
<td>10. Send Parents regularly to the Parent Center</td>
<td>OSDE/Monica</td>
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<tr>
<td>11. Print Name Tags on 3 x 4 cards</td>
<td>OU/Jim</td>
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<tr>
<td>12. Print Signs for breakout sessions, team meeting rooms, and upcoming training</td>
<td>OU/Jim</td>
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<tr>
<td>13. Print Indicator 13 checklist</td>
<td>Parent Center/Nancy</td>
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<tr>
<td>14. Prepare for and conduct Transition 101 on September 3, 2008 from 2:00-5:00</td>
<td>OU/Jim, OSDE/Kim, DRS/Marla</td>
<td></td>
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<tr>
<td>15. Prepare for and conduct Facilitator Training (Nancy will attend)</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>16. Develop Team Tools and print for participants</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>17. Provide Web link to District Data Profiles</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>18. Send Parents regularly to the Parent Center</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>19. Provide Web link to District Data Profiles</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>20. Send Parents regularly to the Parent Center</td>
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<tr>
<td>21. Print Name Tags on 3 x 4 cards</td>
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<tr>
<td>22. Print Signs for breakout sessions, team meeting rooms, and upcoming training</td>
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<tr>
<td>23. Prepare for and conduct Transition 101 on September 3, 2008 from 2:00-5:00</td>
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<tr>
<td>24. Provide Web link to District Data Profiles</td>
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<tr>
<td>25. Send Parents regularly to the Parent Center</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>26. Print Name Tags on 3 x 4 cards</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>27. Print Signs for breakout sessions, team meeting rooms, and upcoming training</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>Task</td>
<td>Responsible Party</td>
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<tr>
<td>Print the SOP</td>
<td>OSDE/Janet</td>
<td></td>
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<tr>
<td>Print the IEP</td>
<td>OSDE/Janet</td>
<td></td>
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<tr>
<td>Develop contract for Diane Bassett for $1000</td>
<td>OSDE/Kim</td>
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<tr>
<td>Add event to the OSDE-SES Web site</td>
<td>OSDE/Kim</td>
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<tr>
<td>Develop Contract for Sean</td>
<td>OSDE/Kim</td>
<td></td>
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<tr>
<td>Develop contract for Brad</td>
<td>OSDE/Kim</td>
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<tr>
<td>Develop contract for Donna</td>
<td>OSDE/Kim</td>
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<tr>
<td>Develop contract for Deborah</td>
<td>OSDE/Kim</td>
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<tr>
<td>Edit and e-mail the Save-the-Date card</td>
<td>OSDE/Kim</td>
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<tr>
<td>Print and mail brochure</td>
<td>OSDE/Monica</td>
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<tr>
<td>Develop and provide Online registration</td>
<td>OU/Jim</td>
<td></td>
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<tr>
<td>Contact Donna and Jamie as facilitators</td>
<td>OU/Jim</td>
<td></td>
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<tr>
<td>Develop a brochure</td>
<td>OU/Vincent</td>
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<tr>
<td>Make list of facilitators</td>
<td>Parent Center/Nancy</td>
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<tr>
<td>Receive presenter profiles</td>
<td>CareerTech/Kahle</td>
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<tr>
<td>Bring the blue folders</td>
<td>ABLE Tech/Linda</td>
<td></td>
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<tr>
<td>Stuffing Packets on September 3 in Twilight Room at 8:30 AM</td>
<td>All</td>
<td></td>
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<tr>
<td>Stuff name tags in holders in Twilight Room on September 3rd</td>
<td>All</td>
<td></td>
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<tr>
<td>Visit teams to ensure needs are net</td>
<td>All</td>
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<tr>
<td>Visit breakout sessions to ensure needs are net</td>
<td>All</td>
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<tr>
<td>Provide necessary brochures for agencies, etc.</td>
<td>All</td>
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<td>Provide reams of paper</td>
<td>All</td>
<td></td>
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<tr>
<td>Provide white boards/flip charts and markers</td>
<td>CareerTech/Denise and Kahle</td>
<td></td>
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<tr>
<td>Bring Notepads</td>
<td>DRS/David</td>
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<tr>
<td>Provide Accommodations</td>
<td>DRS/Teresa and/or David</td>
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<tr>
<td>Task</td>
<td>Assignee</td>
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<td>----------------------------------------------------------------------</td>
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<tr>
<td>Work the registration tables each day</td>
<td>NPS/Dana, DHS-DDSD/Regina, DRS/Teresa</td>
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<tr>
<td>Facilitate the Time with Experts</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>Facilitate Team Report Out</td>
<td>NSTTAC/Paula</td>
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<tr>
<td>Conduct onsite travel for K-12</td>
<td>OSDE/Belinda and Tommie</td>
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<tr>
<td>Emcee/facilitator</td>
<td>OSDE/Kim</td>
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<tr>
<td>Purchase/provide pens</td>
<td>Tribal VR/Anita and Mary</td>
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<tr>
<td>Provide blue tape on September 3</td>
<td>Workforce/Frank</td>
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</tbody>
</table>

Institute Planning Team Worksheet: Detailed Tasks and Assignment List – Provided by Oklahoma Transition Council
Potential Transition Institute Team Members:

- Student with a disability
- Family member of a student with a disability
- Educators
  - Special educator
  - General educator
  - Career and technical educator
  - Transition specialist
  - Work-study or work-based education coordinator
  - Dropout prevention coordinator
- Education service providers
  - School counselor
  - Social worker
  - School psychologist
  - Paraprofessional
  - Occupational or physical therapist
  - Assistive technology provider
- Administrators
  - Special education
  - General education
  - Service agency
- Transition services agency representatives
  - Vocational rehabilitation
  - Community mental health
  - Employment services
  - Transportation
  - Disability advocate
### Transition Institute Preparation

#### Characteristics of a Transition Institute
- Keynote presentations
- Breakout sessions
- Stakeholder teams
- Facilitated team meetings
- Planning tool
- Content resources for team meetings
- Follow-up cadre meetings
- Networking opportunities

#### Responsibilities of Team Leader
- Build a team representing key personnel
  - Special education supervisor
  - Special education teacher
  - Family member of a student with a disability
  - Representative from agency for students with disabilities
  - Student with disability
  - General education teacher
- Gather materials to bring to Institute
  - Current team planning tool
  - Current team planning tool update
  - Transition performance information
    - Local transition indicator data
      - graduation rate (Indicator 1)
      - drop-out rate (Indicator 2)
      - content of IEPs (Indicator 13)
      - post-school outcomes (Indicator 14)
    - Student achievement data
Program evaluation results (e.g., teacher workshops, student employment data from work-based programs, student performance in life skills curricula, etc.)

Relevant information regarding your local community context

Specific information regarding: taxonomy area

Specific information regarding Student-focused planning
- # students with PLAAFP regarding transition goals and services based on transition-related assessments
- # students with measurable post-school goals
- # IEP goals that are student-initiated
- # students with goal-related annual objectives and transition services
- # students attending their IEP meeting; level of student participation
- # students whose course of study aligns with post-school goals

Specific information regarding interagency collaboration
- # and content of agreements
- Agency information products; dissemination records
- Agency fairs: # participants, # attendees, attendee satisfaction
- Record of student service needs identified by students, parents, educators, service providers
- # of service providers invited and attending IEP meetings
- Student support needs identified in the IEP
- Community partner survey data (needs and/or satisfaction)
- Collaboration protocols or action plans
- # and type of projected service needs; # and type of unmet needs
- # students referred for agency services; # students receiving services
Section 4

Transition Institute
Agendas

New Mexico 2011
Oklahoma 2010
Arkansas 2010
Arkansas 2008
New Mexico 2008
Oklahoma 2008
Colorado 2007
Day 1: Tuesday, June 14, 2011
8:00am ~ 8:30am  Institute Welcome and Overview: Denise Koscielniak, NMPED-SEB Director, Institute Planning Team — Alvarado D–E
8:30am ~ 9:30am  Keynote Address: “Making the Connections Across Behavior, Academics, and Transition to Life,” Dr. James Patton — Alvarado D–E
9:30am ~ 9:45am  BREAK
9:45am ~ 10:45am Strand-specific Content — See Strand Schedule
11:00am ~ 11:45am LUNCH — Atriums and Alvarado D–E
12 noon ~ 1:00pm  Within Strand Team Planning — See Strand Schedule
1:00pm ~ 1:15pm  BREAK
1:15pm ~ 2:15pm  Strand-specific Content — See Strand Schedule
2:15pm ~ 2:30pm  BREAK
2:30pm ~ 4:30pm  Strand-specific Content — See Strand Schedule

Day 2: Wednesday, June 15, 2011
8:00am ~ 9:30am  Strand-specific Content — See Strand Schedule
9:30am ~ 9:45am  BREAK
9:45am ~ 10:45am Strand-specific Content — See Strand Schedule
11:00am ~ 11:45am LUNCH — Atriums and Alvarado D–E
12 noon ~ 1:00pm  Guided Cross-Strand Discussions: See Schedule for Room Assignments
1:00pm ~ 1:15pm  BREAK
1:15pm ~ 2:15pm  Strand-specific Content — See Strand Schedule
2:15pm ~ 2:30pm  BREAK
2:30pm ~ 4:30pm  Strand-specific Content — See Strand Schedule

Day 3: Thursday, June 16, 2011
8:00am ~ 10:45am Strand-specific Content — See Strand Schedule
10:45am ~ 11:00am BREAK
11:00am ~ 11:45am Report-Out — See Strand Schedule
11:45am ~ 12 noon  Box Lunch/Closing
2011 New Mexico Summer Institute • Transition Strand Content Sessions

The transition strand content sessions are organized around four specific topics, which represent key aspects of student-focused planning. In the following schedule of content sessions, each presentation is keyed to indicate the topic focus as described below.

- Compliance and Content of the Individual Education Program (IEP)
- Building Effective Transition Services and Courses of Study
- Engaging Agencies, Families, and Students in Transition Planning
- Evaluation and Sustainability

Content Session #1: Tuesday, June 14, 9:45 a.m. – 10:45 a.m.

Title Achieving Compliance by Aligning Meaningful Annual Goals with Postsecondary Goals – Part 1

Topic Focus Compliance and Content of the Individual Education Program (IEP)

Room Alvarado A

Presenter Jon Paul Burden, Weld Re-4 School District, Windsor, CO

Description This session will provide an overview of a method for developing, analyzing, and completing annual IEP goals that clearly and indisputably align and are "reasonably calculated to promote movement toward the postsecondary goals". This method of goal writing begins with providing assured compliance with Indicator 13 requirements while moving into meaningful relevance for the student and family and ultimately landing in the realm of best practice. This methodology of goal writing is required and performed for ALL annual goals on ALL secondary IEPs for the Weld Re-4 School District in Colorado and has proven to ensure a "bullet proof" resistance to Indicator 13 monitoring scrutiny.
Title: Using Transition Assessment Information to Integrate Academics and Transition IEP Development

Topic Focus: Building Effective Transition Services and Courses of Study

Room: Alvarado F

Presenter: Jim Patton, Consultant and Adjunct Faculty, University of Texas at Austin

Description: In this session, Dr. Patton will share both knowledge and skills regarding use of results of transition assessments to create more holistic, meaningful programs for youth with disabilities. Examples of academic IEP planning, based on informal and formal transition assessment data, will be linked to functional outcomes. Conversely, examples of career and life skills development (again based on assessment results), will be tied to academic achievement, resulting in integrated IEPs.

Title: Transition Embedded IEPs

Topic Focus: Engaging Agencies, Families, and Students in Transition Planning

Room: Alvarado G

Presenters: Shelley Bruns and Lee Willits, Roswell I.S.D. Special Education

Description: Participants will learn strategies for incorporating student-level data into all aspects of transition planning (i.e., course of study, transition services and linkages, annual and post-secondary goals).

Title: Changing Our Focus on Accountability: Using What We Know to Improve What We Do – Part 1

Topic Focus: Evaluation and Sustainability

Room: Alvarado H

Presenter: Paula Kohler, NSTTAC – Western Michigan University

Description: State and federal mandates require that we collect a variety of data regarding our transition education, services, and outcomes of our students. With a few strategies, we can use this information to tell us what’s working and what’s not. This presentation will describe evaluation strategies and examples of how we can make our data work for us.

Title: Nuts and Bolts of Indicator 13 Components

Topic Focus: Compliance and Content of the Individual Education Program (IEP)

Room: Alvarado A

Presenters: Leah Johnson and Thomas Lopez, New Mexico PED Special Education Bureau

Description: Have you ever wondered what it takes to write and implement an IDEA-compliant IEP? This session will cover the basics of writing an IEP that meets the criteria for SPP/APR Indicator 13, focused on secondary transition. Learn how to write appropriate measurable annual goals, aligned with post-secondary goals and based upon age-appropriate transition assessments. This session will also provide participants with information on how to write annual IEP goals related to the student's transition services needs that include linkages with various agencies.
Title: Achieving Compliance by Aligning Meaningful Annual Goals with Postsecondary Goals – Part 2
Topic focus: Compliance and Content of the Individual Education Program (IEP)
Room: Alvarado F
Presenter: Jon Paul Burden, Weld Re-4 School District, Windsor, CO
Description: With in-depth modeling and hands-on practice, this session will take participants through the triangulation method for aligning meaningful annual goals with post-secondary goals. This method of goal writing begins with providing assured compliance with SPP/APR Indicator 13 requirements while moving into meaningful relevance for the student and family and ultimately landing in the realm of best practice.

Title: Engaging Community Service Providers in Implementing a Transition-focused Course of Study for Youth with Developmental Disabilities
Topic focus: Engaging Agencies, Families, and Students in Transition Planning
Room: Alvarado G
Presenter: James Alarid, New Mexico Highlands University
Description: This presentation will focus on the kinds of services community agencies can provide during a student’s secondary education that will help move students toward successful transition outcomes. Specific strategies for providing work experience, self-determination instruction, and other secondary education transition services in collaboration with community agencies will be described.

Title: Changing Our Focus on Accountability: Using What We Know to Improve What We Do – Part 2
Topic focus: Evaluation and Sustainability
Room: Alvarado H
Presenter: Paula Kohler, NSTTAC – Western Michigan University
Description: This session focuses on assisting institute teams to use their local data to develop action plans for 2011 – 2012. We will identify examples of transition improvement goals, activities, outcomes, and evaluation strategies with which to build Section 3 of their team planning tool. The NSTTAC team planning tool checklist will provide explicit criteria and examples for building a sound improvement plan.
<table>
<thead>
<tr>
<th>Title</th>
<th>Using Your Online Database to Ensure Quality of Transition Programming for Students with IEPs</th>
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<tbody>
<tr>
<td>Topic focus</td>
<td>Compliance and Content of the Individual Education Program (IEP)</td>
</tr>
<tr>
<td>Room</td>
<td>Alvarado A</td>
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<tr>
<td>Presenter</td>
<td>Bill Nichols, Gallup McKinley County Schools</td>
</tr>
<tr>
<td>Description</td>
<td>A form-based electronic information management system, such as TieNet, can help your district meet SPP/APR Indicator 13 requirements by helping you identify students who require audits, consolidating information from transition documents, and providing efficient methods for auditing. The system can also help ensure completion of annual goals and supporting activities and strategies related to transition.</td>
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<tr>
<th>Title</th>
<th>The Cibola High School Greenhouse: Teaching and Learning Mathematics and Career Skills Through a Growing and Composting Program</th>
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<tbody>
<tr>
<td>Topic focus</td>
<td>Building Effective Transition Services and Courses of Study</td>
</tr>
<tr>
<td>Room</td>
<td>Alvarado F</td>
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<tr>
<td>Presenter</td>
<td>Anthony Rodriguez and students, Albuquerque Public Schools</td>
</tr>
<tr>
<td>Description</td>
<td>This session will highlight strategies for using work-based education to teach math and science skills. Students employed in the greenhouse project demonstrated acquisition of academic skills while accomplishing goals within the employment site.</td>
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<table>
<thead>
<tr>
<th>Title</th>
<th>Finding Your Voice Through Self-advocacy: Building Linkages Between Family and Community Service Providers</th>
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<tr>
<td>Topic focus</td>
<td>Engaging Agencies, Families, and Students in Transition Planning</td>
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<tr>
<td>Room</td>
<td>Alvarado G</td>
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<tr>
<td>Presenters</td>
<td>Mary Reeves and Joe Lacayo, Gallup McKinley County Schools</td>
</tr>
<tr>
<td>Description</td>
<td>In this session, participants will learn how students from a high school in Gallup, New Mexico used self-advocacy instruction and self-directed IEPs to engage community service providers in their transition planning.</td>
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<tr>
<td>Title</td>
<td>Sustaining Your Team’s Initiative: The NSTTAC Transition Team Leader’s Sustainability Toolkit</td>
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<tr>
<td>Topic focus</td>
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<tr>
<td>Room</td>
<td>Alvarado H</td>
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<tr>
<td>Presenters</td>
<td>Jennifer Coyle and Rashell Bowerman, NSTTAC – Western Michigan University</td>
</tr>
<tr>
<td>Description</td>
<td>The National Secondary Transition Technical Assistance Center (NSTTAC) works with state and local transition teams to build capacity to implement effective secondary education and transition services. This presentation describes strategies for building and maintaining local transition teams and illustrates NSTTAC’s Transition Team Leader’s Sustainability Toolkit. The Toolkit provides ideas and resources for fostering the work of the team and overcoming challenges to team effectiveness.</td>
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<th>Title</th>
<th>Using Policy to Improve IEP Content</th>
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<tr>
<td>Presenter</td>
<td>Jennifer Coyle, NSTTAC – Western Michigan University</td>
</tr>
<tr>
<td>Description</td>
<td>This session will demonstrate the impact of policies on the creation of effective and compliant IEPs. Participants will examine specific examples and non-examples of IEP forms that promote good planning; they’ll also learn strategies for advocating needed change in forms and policies at the local level.</td>
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<thead>
<tr>
<th>Title</th>
<th>Creative Transitions: Providing Transition-focused Learning Opportunities Through a School-based Entrepreneurship</th>
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<tbody>
<tr>
<td>Topic focus</td>
<td>Building Effective Transition Services and Courses of Study</td>
</tr>
<tr>
<td>Room</td>
<td>Alvarado F</td>
</tr>
<tr>
<td>Presenter</td>
<td>Teresa Cunningham, Carlsbad High School Rehabilitation Counselor</td>
</tr>
<tr>
<td>Description</td>
<td>As accountability has increased and funding decreased, districts all over New Mexico must become more and more creative to prepare students as they transition from high school to either employment or college. Living in a rural area is even more challenging as employment opportunities are limited. This session demonstrates how a unit on entrepreneurship created an opportunity for a school run business.</td>
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</tbody>
</table>
**Title**   Employment Strategies for Transitioning Youth  
**Topic focus**   Engaging Agencies, Families, and Students in Transition Planning  
**Room**   Alvarado G  
**Presenter**   Andrea Cetera-Jines, Advanced Employment Solutions  
**Description**   During this hands-on session, participants will learn about self-directed job search strategies for youth, as well as Social Security’s Ticket to Work and Self-Sufficiency Program. Through the use of simple, self-empowering and self-implemented tools, transitioning youth, with support from teachers and/or their parents, can take a lead in their job search. The skills and process covered in this session will teach youth how to present themselves to potential employers, network within their circle of friends and families, and assist in identifying the type of job best suited for them.

**Title**   Stories From the Front Line: Using Strategic Planning to Create Sustainable and Successful Transition Teams  
**Topic focus**   Evaluation and Sustainability  
**Room**   Alvarado H  
**Presenter**   Jon Paul Burden, Weld Re-4 School District, Windsor, CO  
**Description**   This session will highlight "stories from the front line" or how a local transition team, led by their Director of Special Education, have accomplished the goals developed through strategic planning at their summer transition institute. Participants will hear strategies for busting barriers and for sustaining momentum of the progress of the transition team.

*Please tell us how we did!*  
*Complete your institute evaluation and return it to the registration desk.*

*Thank you!*
<table>
<thead>
<tr>
<th>Content session #1</th>
<th>Compliance and Content of the Individual Education Program (IEP)</th>
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<th>Engaging Agencies, Families, and Students in Transition Planning</th>
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<tr>
<td>Tuesday 9:45 a.m. - 10:45 a.m.</td>
<td>Achieving compliance by aligning meaningful annual goals with postsecondary goals – Part 1</td>
<td>Using transition assessment information to integrate academics and transition IEP development</td>
<td>Transition embedded IEPs</td>
<td>Changing our focus on accountability: Using what we know to improve what we do – Part 1</td>
</tr>
<tr>
<td>Jon Paul Burden</td>
<td>Jim Patton</td>
<td>Shelly Bruns and Lee Willits</td>
<td>Paula Kohler</td>
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<tr>
<td>Content session #2</td>
<td>Achieving compliance by aligning meaningful annual goals with postsecondary goals – Part 2 <em>(CIEP strand)</em></td>
<td>Engaging community service providers in implementing a transition-focused course of study for youth with developmental disabilities</td>
<td>Changing our focus on accountability: Using what we know to improve what we do – Part 2</td>
<td>Paula Kohler</td>
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<tr>
<td>Tuesday 1:15 p.m. - 2:15 p.m.</td>
<td>Leah Johnson and Thomas Lopez</td>
<td>Jon Paul Burden</td>
<td>Jim Alarid</td>
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<tr>
<td>Content session #3</td>
<td>Using your online database to ensure quality of transition programming for students with IEPs</td>
<td>The Cibola High School Greenhouse: Teaching and learning mathematics and career skills through a growing and composting program</td>
<td>Finding your voice through self advocacy: Building linkages between families and community service providers</td>
<td>Sustaining your team’s initiative: The NSTTAC transition team leader’s sustainability toolkit</td>
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<tr>
<td>Wednesday 9:30 a.m. - 10:30 a.m.</td>
<td>Bill Nichols</td>
<td>Anthony Rodriguez</td>
<td>Mary Reeves, Jeremy Liu, and Megan O’Neal</td>
<td>Jennifer Coyle and Rashell Bowerman</td>
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<tr>
<td>Content session #4</td>
<td>Using policy to improve IEP content</td>
<td>Creative transitions: Providing transition-focused learning opportunities through school-based entrepreneurship</td>
<td>Employment strategies for transitioning youth</td>
<td>Stories from the front line: Using strategic planning to create sustainable and successful transition teams</td>
</tr>
<tr>
<td>Wednesday 1:15 p.m. - 2:15 p.m.</td>
<td>Jennifer Coyle</td>
<td>Teresa Cunningham</td>
<td>Andrea Cetera-Jines</td>
<td>Jon Paul Burden</td>
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Fifth Annual Oklahoma Transition Institute

University of Oklahoma
OCCE Thurman J. White Forum
1704 Asp Ave.
Norman, OK  73019

September 14-16, 2010
## Institute Schedule

### Tuesday - 9/14

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>10:00-12:00</td>
<td><strong>Facilitator Training</strong> - Amber McConnell, Marsha Dempsey, and Karen Little</td>
<td>Room A-2</td>
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<tr>
<td>12:00-12:30</td>
<td><strong>Lunch</strong> (provided for facilitators, NSTTAC, and Council Members present)</td>
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<tr>
<td>12:30-2:00</td>
<td><strong>Facilitator Training continued</strong> - Amber McConnell, Marsha Dempsey, and Karen Little</td>
<td>Room A-2</td>
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<td>12:30-2:00</td>
<td><strong>Transition 101</strong> - Jim Martin and Kim Eason</td>
<td>Conference Room A</td>
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<td><em>Session Description:</em> This workshop is designed for participants new to transition or who have not attended a previous Oklahoma Transition Institute. This workshop will provide an overview of transition education concepts and practices, and will describe the Oklahoma Transition Institute, the role of teams and team members. Participants who want to learn more about transition education and how to gain the most from the Institute are also welcome to attend.</td>
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<tr>
<td>2:15-3:45</td>
<td><strong>IEP Transition Pages</strong> - Letha Bauter</td>
<td>Conference Room B</td>
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<td><em>Session Description:</em> The OSDE will provide training to complete the transition pages of the Oklahoma IEP. The OSDE staff will explain how to write appropriate annual postsecondary transition goals and answer questions concerning transition plans for students with disabilities.</td>
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### Wednesday - 9/15

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<thead>
<tr>
<th>Time</th>
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<tr>
<td>8:30-9:30</td>
<td><strong>Welcome and Introductions</strong></td>
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<td>- Joan Smith, Dean of OU Jeannine Rainbolt College of Education</td>
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<td>- Logistics and Administrative information - Letha Bauter</td>
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<td></td>
<td>- Overview of day/tool/taxonomy - Jim Martin</td>
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<td>- Overview of Owasso Area Transition Team - Susan Teague</td>
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<tr>
<td>9:30-12:00</td>
<td><strong>Team Meeting 1 / Lunch</strong> (provided)</td>
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<tr>
<td>12:00-1:00</td>
<td><strong>Breakout Session 1</strong> (please see page 3 for descriptions)</td>
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<tr>
<td>1:00-1:20</td>
<td><strong>Break</strong></td>
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<tr>
<td>1:20-2:20</td>
<td><strong>Breakout Session 2</strong> (please see page 4 for descriptions)</td>
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<tr>
<td>2:20-2:45</td>
<td><strong>Break</strong></td>
<td></td>
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<tr>
<td>2:45-3:45</td>
<td><strong>Team Meeting 2</strong></td>
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<tr>
<td>4:00-4:30</td>
<td><strong>Facilitator Debrief</strong></td>
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</table>
Thursday - 9/16

8:30-9:00  Welcome, Overview of the day, and Recap from previous day - Letha Bauter

9:00-10:00  Breakout Session 3  (please see page 5 for descriptions)

10:00-10:20  Break

10:20-12:20  Team Meeting 3

12:20-1:20  Lunch Buffet

1:20-2:45  Team Meeting 4

2:45-3:30  Team Reports, Poster Prizes, and Closing
- Team accomplishments and highlights - Rick DeRennaux
- What’s coming this year - Letha Bauter

3:30-4:00  Transition Council Debrief - Letha Bauter and Kim Osmani
Breakout Sessions for Wednesday, 9/15 (12:00-1:00)

Creating Transition Electives - Rhonda Heller and Susan Teague  
Conference Room A  
**Session Description:** This session will give participants an overview of the process used by Owasso Public Schools to create Transition Elective Courses. We will outline the steps we used in determining what topics to cover at each grade level. We will also share how we have expanded our Work Study program to include a wider variety of work sites, as well as how we are working with DRS and Goodwill Industries to integrate a Work Site Adjustment Training.

Developing Transition Activities: Students and Families - Betsy LeFrancois and Polly Oliver  
Conference Room B  
**Session Description:** Transition is not a status—it’s an activity which must involve the students and their families (as well as school personnel and administrators). In this session, we will describe the process by which the Moore Transition Team was able to develop successful activities, give examples of what we have implemented to date, and discuss what we hope to do in the future.

Empowerment, Independence, and Equal Access: Students with Disabilities in Postsecondary Education - Emily Cheng  
Room C-2  
**Session Description:** This session focuses on students with disabilities transitioning from high school special education services to the postsecondary education setting. Topics discussed include basic principles/laws that apply to students with disabilities in postsecondary education, differences between high school and college for students with disabilities, and how postsecondary education settings accommodate this population. Rights and responsibilities of students with disabilities in postsecondary education will also be addressed, along with how high schools and colleges can work together to promote student access and independence in their respective settings.

Parent Involvement and Self-Advocacy in Transition - Catherine Burzio  
Room A-1  
**Session Description:** In this presentation, participants will explore this critical question - How can we prepare our students with disabilities for a competitive 21st century world? Tips and strategies for increasing student self-advocacy and parent involvement will be discussed.

Student Involvement in the IEP and Transition Planning Process - James Martin  
Room A-2  
**Session Description:** Active student involvement in the IEP and transition planning and implementation process increases the likelihood for postschool employment and education. During this session you will learn: (a) methods to teach students skills to become more involved in their educational planning process, (b) methods to teach students goal attainment skills so they can work on accomplishing their annual transition goals each week, and (c) how to increase the IEP team’s involvement in facilitating a student-directed planning process.

Transition Made Easy...(ier): Computer Applications & Entrepreneurial Projects via Tech Now - Rick DeRennaux  
Room B-1  
**Session Description:** This session will give examples of students’ entrepreneurial projects and activities that have been done using the skills taught in the Tech-Now program. Activities are safe, low cost, and rely almost totally on the equipment and supplies used in the current program. Utilizing the technology skills gained in the Tech-Now program, these activities very closely emulate real employment and afford the students opportunities to enhance and practice their team skills as well as develop and practice employment/soft skills.
Breakout Sessions for Wednesday, 9/15 (1:20-2:20)

How to Prepare 9th and 10th Grade Students for Career Tech - Kim Eason

Session Description: In this session participants will learn how best to prepare high school underclassmen to be successful at Career Tech. Topics will include appropriate placement, academic preparation, family support, and realistic vision.

Involving Parents of Elementary Students in the Transition Planning Process - John Hilborn

Session Description: This session will cover the importance of parent involvement in the transition process and specifically the best practices for involving parents to begin transition planning as early as the elementary years. An explanation for the "how-to's" in getting this accomplished will be covered.

Lessons Learned: Beginning a Transition Program - Jennifer Parker and Jamie Cook

Session Description: An overview of the process Duncan Public Schools began in order to develop a transition program. This will include resources available, transportation, scheduling, community based partnerships, curriculum concerns, portfolios, and an opportunity to problem solve. An outline will provide a step-by-step guide to assist their planning and we will share a list of "hints" for new transition coordinators.

Person-Centered Thinking - Mary Katherine Long and Jenifer Randle

Session Description: This workshop will present an overview of Person-Centered Thinking tools that focus on the importance of being listened to; the role of daily rituals and routines; how to discover what is important to people; how to sort what is important for people from what is important to them; how to address issues of health or safety while supporting choice. This training will provide you with tools that help put important information into words. The tools are easy to use and help everyone to think about the preferences of the person with disabilities.

Summary of Performance and Self-Directed Transition Planning - Lorrie Sylvester

Session Description: Student-Directed Transition Planning (SDTP) is a process whereby students with disabilities, their families, and teachers can jointly clarify culturally relevant visions for post-secondary employment, further education, and adult living. We will demonstrate the SDTP lessons, how they align with IDEA 2004, and show how students can use the lessons to develop their own Summary of Performance.

Tools for Developing Self-Determined Students - Penny Cantley, Amber McConnell, and Karen Little

Session Description: This session is designed to provide a basic overview of Me! Lessons for Teaching Self-Awareness and Self-Advocacy and I'm Determined. Both lesson plan packages provide tools and resources for teaching students self-determination knowledge and skills. Attendees will learn (a) the basic components of both lesson plan packages, (b) ways to meet PASS and National Standards while using the lessons, and (c) how to access the lessons at no charge.

Understanding DRS and Services - Terrisha Osborn and Melinda Lucas

Session Description: This session will present information on how to connect with DRS; the goal and the purpose of DRS; what DRS can help you achieve; major services available with DRS; a breakdown of the DRS process and an understanding of client's responsibilities; how schools can best work with DRS; the value of having DRS in your schools.
Breakout Sessions for Thursday, 9/16 (9:00-10:00)

A Framework for Supporting Individuals with Autism - Rene Daman and Julie Smith  
Conference Room B  
Session Description: Participants in this session will be introduced to a framework for supporting persons with autism spectrum disorders through secondary-transition and into adulthood. This framework is based on the Ziggurat Model, a comprehensive tool to assist in assessment and program planning for ASD.

Community Resources for An Effective Transition - Joni Bruce and Nancy Garner  
Conference Room A  
Session Description: Finding community resources to support students and families through an effective transition is possible. During this session, you will hear about resource agencies who encourage families and students along their way and support the efforts of staff empowering youth and families to adulthood.

NIMAS: Providing Accessible Materials for Students with Print Disabilities - Linda Jaco and Tessa Stinnett  
Room B-1  
Session Description: The National Instructional Materials Accessibility Standard (NIMAS) is a provision in the reauthorization of IDEA 2004 and is intended to maximize access to the general education curriculum for students who are print-disabled due to vision, learning, cognitive, or physical disabilities. This session will provide basic knowledge of the Standard and the process in Oklahoma for obtaining accessible instructional materials for students, with emphasis on ABLE Tech’s support for LEA’s through NIMAS-related equipment demonstrations and short-term loans.

Outside the Box: Community Based Work Experiences after High School - Dee Blose and Brandon Smith  
Room A-1  
Session Description: This workshop will provide a brief look at innovative ideas for employment for developmentally disabled adult workers, thinking outside the traditional “sheltered workshop” experience; also, developing opportunities for special needs individuals who are not presently being served through the In-Home or Community-Based Waiver program.

Teaching Transition Education Skills in an Inclusive High School Classroom - Debbie Sears and Alicia Farley  
Room A-2  
Session Description: Goal attainment is a critical transition education skill. This presentation will describe how special education teachers and regular education teachers can infuse goal attainment instruction into a co-taught classroom. We will describe the importance of goal attainment, how goal attainment is taught, and student success stories.

Transition in Mid-Del Schools - Rocky Winkle, Linda Wilson, and Rachel Hurt  
Room C-2  
Session Description: This workshop is designed to provide options for training for Special Education students in Mid-Del Schools.

What Students Need to be Taught Before They Graduate - Denise North  
Room B-2  
Session Description: Preparing students for life is more than academics, but most of the skills can be woven into the school day. Soft skills, job readiness, business writing, and math can all be taught as part of the general curriculum. This session will discuss the need for these critical skills as well as how to teach them.
Be sure to stop by and view the team posters!
Letha Bauter is the SPDG Project Coordinator for the State Personnel Development Grant. She is co-chair of the Oklahoma Transition Council and serves on the Oklahoma Rehabilitation Council. Through OSDE, she has worked as coordinator for the State Improvement Grant, Project Director of the Oklahoma Deaf-Blind Grant, and monitoring coordinator.

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Catherine Burzio is the Transition Coordinator of the NEXT STEPS Transition Parent Center funded by the USDOE Rehab Services Administration. She is a former Transition Specialist for Clarke County Public Schools and volunteers with The Chromosome 18 Registry & Research Society as the Vice President for Member Relations.

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Penny Cantley is a Ph.D. Candidate in the Dept. of Educational Psychology at OU. She has six years experience as a special education teacher in both elementary and high school, and has three years teaching experience at the college level.

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Emily Cheng has worked as an academic advisor and disability services coordinator at OSU-OKC since 2005. She has a Master’s degree in Rehabilitation Counseling with a background in mental health counseling and vocational rehabilitation.

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Jamie Cook has served as a special education teacher for seven years as well as special education director for Duncan Public Schools for four years. She has partnered with local businesses and DRS to improve transition services for their students.

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Rene Daman is the director of the Oklahoma Autism Network at OUHSC. She has been with the Dept. of Rehabilitation Services since 1999 and has provided training and technical assistance for providers who support children with autism and their families.

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Marsha Dempsey is a third-year doctoral student in Special Education at OU. Her experiences include providing special education to elementary and middle school students with severe emotional and behavioral disorders. She has worked with OTI and NSTTAC as a team facilitator.

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Rick DeRennaux is the President and CEO of Tech-Now, Inc. He has received numerous awards for his achievements and dedication to the teaching profession. He has presented at national and state conferences on topics in the ever-changing education profession. He has taught elementary, middle, and high school students with special needs.

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Kim Eason is the Academic and Transition Specialist for the Oklahoma Dept. of Career Tech. Prior to joining CTE in 2009, she spent 18 years in the classroom, teaching high school language arts. She is also the parent of a student with learning disabilities.

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Alicia Farley received her M.Ed. from Southeastern Oklahoma State University and has worked as an English teacher at Durant for a number of years. She has taught middle school and high school.

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Nancy Garner is the Director of Special Projects for the Oklahoma Parents Center. She is the mother of three children and grandmother of two amazing granddaughters. She has been a teacher, research coordinator, social worker, and a long time advocate for children with special needs. She travels throughout the state, providing training and support to parents and professionals, and sharing the insight gained from her experience as a parent of a young adult with disabilities, as well as her professional knowledge.

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Rhonda Heller is the Special Education Coordinator for the secondary level at Owasso Public Schools. She is a member of the Owasso Area Transition Team.

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**Presenter Biographies**

**John Hilborn** has 31 years experience in the field of special education. He is currently working for the Broken Arrow Public Schools as a Transition Specialist and Special Education Department Chair and is an adjunct instructor for Northeastern State University, Broken Arrow.

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**Rachel Hurt** has been teaching for many years with a strong focus on Transition. Her team has worked with the PAES lab for six months.

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**Linda Jaco** is the Director of Sponsored Programs at the Seretean Wellness Center at OSU where she oversees a number of state and federal programs, including Oklahoma ABLE Tech, totalling in excess of $3 million annually. She actively participates in a number of task forces, boards, and committees related to disability services.

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**Betsy LeFrancois** has taught secondary Special Education in the Moore School District for 31 years and has been the Transition Team Leader since the inception of OTI.

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**Karen Little** is a doctoral student in the Dept. of Educational Psychology at OU. Her background includes experience as a teacher at the elementary and middle school level, special education coordinator, and assistant principal.

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**Mary Katherine Long** is a Special Programs Coordinator at the Center for Learning and Leadership, a federally designated University Center for Excellence in Developmental Disabilities. She has an extensive background in disability advocacy and disability services. She currently delivers training in Person Centered Thinking and Essential Lifestyle Planning.

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**Melinda Lucas** is a Transition Counselor in Tulsa who has worked with transition students for four years. She is assigned to four high schools and is the Rehab Counselor over Project Search at St. John’s. She has experience with School Work Study, Work Adjustment, and Vocational Evaluation for transition students.

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Amber McConnell is a doctoral student in the Dept. of Educational Psychology at OU. She has six years experience as a special education teacher and has played an active role in OTI as a team member, leader, and presenter for the past four years.

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James Martin holds the Zarrow Family Chair in Learning Enrichment at the University of Oklahoma and he directs the OU’s Zarrow Center. CEC’s Division on Career Development and Transition awarded Dr. Martin the Oliver P. Kolstoe Award for his efforts to improve transition education practices.

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Denise North has worked in Special Education for 18 years, eight years in comprehensive schools and Alternative school. The other years have been in the Career Tech system, first at Gordon Cooper, then at the Oklahoma State Dept of Career Tech as the Disability Services Specialist, working with technology centers around the state. She is now Director of Disability Services at Metro Technology Centers where she works with staff and both secondary and post-secondary students with disabilities.

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Polly Oliver is a coordinator/administrator in the Moore Public Schools.

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Terrisha Osborn is a Vocational Rehabilitation Specialist with the Dept. of Rehabilitation and has been with the agency five years. She is a transition specialist who works with Moore, Noble, and Norman Public Schools as a certified rehabilitation counselor.

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Jennifer Parker has been a special education teacher, ESL teacher, department head, and school diagnostician in several school districts and grade levels. She holds a Bachelor’s degree in Special Education from OSU and her Master’s of Education degree is from Houston Baptist University.

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Presenter Biographies

**Julie Smith** is the assistant director of the Oklahoma Autism Network at OUHSC. She has provided training and technical assistance for assessment and development of the individualized family service plan in SoonerStart, early childhood transition, evidence-based practice, parent-child interaction, sensory processing, and supporting children with challenging behaviors/autism and their families.

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**Lorrie Sylvester** earned her PT degree from the University of Oklahoma, MS from Purdue University, and will complete her PhD in special education at OU this fall. While at the Zarrow Center for Learning Enrichment, she co-developed and investigated the SDTP lessons. Her research, teaching, and clinical practice focuses on enabling youth and adults with developmental disabilities achieve their chosen goals.

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**Jenifer Randle** is the Advocacy & Training Coordinator for Youth programs at the Oklahoma Developmental Disabilities Council. She was a special educator for 14 years in an urban district, teaching students with multiple disabilities. Besides coordinating the Oklahoma Youth Leadership Forum, she delivers training in Person Centered Thinking and Essential Lifestyle Planning.

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**Debbie Sears** received her M.Ed. from Oklahoma City University and has worked as a special education teacher at Durant High School for a number of years. She is an active member of her regional transition team and participates in Oklahoma Transition Institute activities. She has taught K-12.

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**Tessa Stinnett** is a speech-language pathologist and has provided assistive technology consultations in addition to teaching assistive technology topics at regional, state, and national conferences. She currently works with Oklahoma ABLE Tech at OSU as an AT Specialist and teaches Augmentive Communication for graduate speech-language pathology students.

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**Lorrie Sylvester** earned her PT degree from the University of Oklahoma, MS from Purdue University, and will complete her PhD in special education at OU this fall. While at the Zarrow Center for Learning Enrichment, she co-developed and investigated the SDTP lessons. Her research, teaching, and clinical practice focuses on enabling youth and adults with developmental disabilities achieve their chosen goals.

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Susan Teague is a School Psychologist at Owasso and serves secondary grades 8-12. She is a member of the Owasso Area Transition Team.

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Linda Wilson has been teaching for many years with a strong focus on Transition. Her team has worked with the PAES lab for six months.

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**Taxonomy for Transition Programming**

- Student-Focused Planning
- Student Development
- Interagency Collaboration
- Program Structures
- Family Involvement
Oklahoma Transition Council Members

Letha Bauter  
Joni Bruce  
Marqus Butler  
Michelle Butts  
Dana Cantwell  
Regina Chace  
Mike Chapman  
Kathy Curtis  
Rene Daman  
Rick DeRennaux  
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Janet Felton  
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John Hilborn  
Linda Jaco  
Sue Keller  
Mary Lee  
Anita Lena  
Valeria Littlecreek  
Tammie Lore  
James Martin  
Teresa McDermott  
Denise North  
Mike Chapman  
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Rene Daman  
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Kim Eason  
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Theresa Hamrick  
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Sue Keller  
Mary Lee  
Anita Lena  
Valeria Littlecreek  
Tammie Lore  
James Martin  
Teresa McDermott  
Denise North

Affiliations

Norman Public Schools, Norman North High School  
Oklahoma Department of Human Services, Developmental Disabilities Services Division  
Oklahoma Department of Human Services, Family Support Services  
Oklahoma Department of Rehabilitation Services  
Oklahoma Department of Mental Health and Substance Abuse  
Oklahoma State Department of Education, Special Education Services  
Oklahoma Department of Career and Technology Education  
Oklahoma Employment Security Commission  
Oklahoma Rehabilitation Council  
Oklahoma State University  
Owasso Public Schools  
Oklahoma ABLE Tech, Seretean Wellness Center, Oklahoma State University  
Parent Training and Information Center of Oklahoma  
Tech-Now Inc.  
University of Oklahoma Health Sciences Center, Child Study Center  
University of Oklahoma, Zarrow Center for Learning Enrichment
2010 Arkansas Transition Summit:
October 11-13, 2010
Embassy Suites and Hot Springs Convention Center, Hot Springs, Arkansas

October 11, 2010
9:00 – 11:30 Registration—Convention Center, outside Hall B
Exhibitors open at 10:00 a.m.
12:15 – 1:30 Welcome – Bonnie Boaz, ATS Coordinator/Jennifer Coyle, Project Coordinator, NSTTAC
Lunch/Opening Session Past, Present, Future—A Look at Team Accomplishments/DCDT Awards Presentation—CC, Hall B
1:45 – 2:45 Keynote, Stephen Shore, Assistant Professor of Special Education, Ruth S. Ammon School, Adelphi University—CC, Rooms 207-209
3:00 – 4:30 1st Team Planning Session (see Team Meeting Location sheet)
4:30 – 5:15 Facilitator Debriefing (Facilitators Only)—CC, Rooms 207-209

October 12, 2010
7:30 - 8:00 Continental Breakfast/Exhibitors Open—CC, Hall B
8:00 - 8:15 Overview of the Day/Debriefing of previous day, Jennifer Coyle—CC, Hall B
8:15 – 9:15 General Session – Family Involvement, Donna Wandry, Professor, West Chester University—CC, Rooms 207-209
9:15 – 9:30 Morning Break—CC, Hall B
9:30 - 10:30 Break out sessions
1. IALAC (I Am Lovable and Capable); Judy Smith, Transition Director, Arkansas Rehabilitation Services—CC, Room 207
2. All Day Every Day Is the Only Way; Marla Matthews, Lucille Polk, Forrest City School District—CC, Rooms 102-103
3. Real Life 101 Transition Fair; Susan Harris, Transition Consultant, JoAnn Johnson, West Memphis School District—CC, Rooms 203-204
4. Everyone Works, Everyone Wins—Bernie Quell, Program Manager, Employability Project—CC, Rooms 201-202
5. Real Life Arkansas—Ron White, Manager, Labor Market Information, Department of Workforce Services—CC, Rooms 104-105
10:35 – 12:00 2nd Team Planning Session (see Team Meeting Location sheet)
12:00 – 1:15 Lunch/Youth Panel—CC, Hall B
2010 Arkansas Transition Summit:
October 11-13, 2010
Embassy Suites and Hot Springs Convention Center, Hot Springs, Arkansas

1:30 – 2:30 Break out sessions

1. Empowering Will Light the Way; Deb Chapman, Fannie Evans, Forrest City School District—**CC, Rooms 102-103**

2. OMG! How Do I Add A/T to the IEP ASAP? - Paul Johnston, Transition Consultant—**CC, Room 207**

3. Using the National PSO Toolkit; Jody Fields, Director, Holly Chason, Research Data Analyst, Arkansas IDEA Data and Research Office—**CC, Rooms 201-202**

4. Outreach to Co-Teach; Nonnie Carroll, Amy Oswalt, Forrest City School District—**CC, Rooms 104-105**

5. SPP/APR Indicator 13: Writing Postsecondary and Annual Transition Goals—Jennifer Coyle, Project Coordinator, National Secondary Transition Technical Assistance Center—**CC, Rooms 203-204**

2:30 – 3:00 Poster Sessions/ Snack Break; various school districts—**CC, Hall B**

3:00 – 4:30 3rd Team Planning Session (see Team Meeting Location sheet)

4:30 – 5:00 Facilitator Debriefing (Facilitators Only)—**CC, Rooms 207-209**

**October 13, 2010**

7:15 – 8:00 Continental Breakfast—**CC, Hall B**

8:00 – 8:15 Overview of the Day, Jennifer Coyle—**CC, Hall B**

8:30 – 9:30 Breakout Sessions

1. iTunes U & You! - Shelley Dirst, ADE/iTunes U, Paul Johnston, Transition Consultant—**CC, Room 207**

2. So You Think OT Has a Role in Secondary Transition Planning? - Tina Mankey, Ed.D., Assistant Professor, UCA—**CC, Rooms 201-202**

3. Using the New Kuder—Ruth Brown, KUDER Field Trainer, KUDER—**CC, Rooms 102-103**

4. Self-Advocacy—Ft. Smith—**CC, Rooms 104-105**

5. Arkansas Rehabilitation Services in the Schools: Catching Students Early—Eddie Hansford, Transition VR Counselor, Arkansas Rehabilitation Services—**CC, Rooms 203-204**

9:30 – 9:45 Morning Break—**CC, Hall B**

9:45 – 10:45 4th Team Planning Session (see Team Meeting Location Sheet)
Welcome to the Summit!

12:15p.m.-1:30p.m.  General Session—Lunch/Openi ng Session Past, Present, Future - A Look at Team Accomplishments/DCDT Awards Presentation—CC, Hall B

1:45p.m. – 2:45p.m.  Keynote Address—“Success with Autism and other Differences: Using our Strengths to lead Fulfilling and Productive Lives—Just Like Everyone Else” - Stephen Shore—CC, Rooms 207-209

Nonverbal until four and recommended for institutionalization, Dr. Shore completed his doctoral work on matching best practice to needs of people on the autism spectrum. Stephen is an internationally re-nowned consultant, speaker, and author on lifespan issues pertinent to education, relationships, employment, advocacy, and disclosure as discussed in his numerous publications. Dr. Shore serves in the Interagency autism Coordinating Committee, for the Board of Directors for Asperger’s Association of New England, the Autism Society of America, and several other autism related organizations.

“Success with Autism and other Differences: Using our Strengths to lead Fulfilling and Productive Lives—Just Like Everyone Else”

Considering autism and other conditions as an expression of the diversity of the human gene pool rather than a life limiting disorder, let’s look at how people with this condition are able to build fulfilling and productive lives. Drawing from the author’s own experiences as well as others on the autism spectrum, practical solutions in the areas of education, relationships, employment, self-advocacy, and disclosure shall be explored for maximizing the potential of people both on and off the autism spectrum.

3:00p.m. - 4:30p.m.  1st Team Planning Session (See Team Meeting Location Sheet)

4:30p.m.—5:15p.m.  Facilitator Debriefing (Facilitators Only) - CC, Rooms 207-209
Session Descriptions, October 12, 2010

7:30am—8:00am  Continental Breakfast/Exhibitors Open—CC, Hall B

8:00a.m. - 8:15a.m.  Overview of the Day/Debriefing of previous day—Jennifer Coyle—CC, Hall B

8:15a.m.—9:15a.m.  General Session - Family Involvement, Donna Wandry, Professor, West Chester University—CC, Rooms 207-209

9:15a.m.—9:30a.m.  Morning Break, CC, Hall B

9:30a.m.—10:30a.m.  Break out sessions

I.A.L.A.C. (I am lovable and capable) summer project—Judy Smith, Arkansas Rehabilitation Services—CC, Room 207
This presentation will provide specific details about organizing a special summer project for high school students living with disabilities and exiting the 9th grade in a cooperative, coordinated and collaborated manner; with limited funds.

All Day Every Day Is The Only Way—Marla Matthews and Lucille Polk, Forrest City School District—CC, Room 102-103
This session will focus on the students in the self-contained classroom with emphasis on parental involvement (COACH model), academics and transitions. If you love what you do learning can be fun, all day every day.

Real Life 101 Transition Fair—Susan Harris, ATS; JoAnn Johnson, West Memphis School District—CC, Rooms 203-204
Tired of the same old Transition Fair year after year? The Reality Store Curriculum will give you all the information to host a one day event for your Transition students. At the event the students will have an opportunity to choose an occupation they would like as an adult. They will be given a checkbook with the amount of money for month’s average salary of the profession they have chosen. The students go into the “store” and have the opportunity to spend their money on necessities and other expenses they see for their lifestyle. JoAnn Johnson of the West Memphis school district will share how they used this concept to create “Real Life 101” for their Transition Fair.

Everyone Works, Everyone Wins—Bernie Quell, Employability Project—CC, Rooms 201-202
SSI Work Incentives and community resources providing vocational related services that can assist with transition leading to potential employment will be the focus of this presentation. Contact information for these community agencies will be provided. A brief overview of the Ready, Set, Goals program will be presented and how it can be utilized for Person Centered Planning.

Real-Life Arkansas and Discover Arkansas—Ron White, Department of Workforce Services—CC, Rooms 104-105
Real Life Arkansas is an internet based Lifestyle Budget calculator that serves as a learning tool for students and jobseekers. It shows how education impacts earnings, how living expenses add up, and which careers can support a preferred type of lifestyle. Discover Arkansas is our Labor Market Information web portal site which contains Employment Statistics, Business Listings, Occupational Wage and Salary Information, Economic and Demographic Data, and Education and Training Information.

10:35a.m.—12:00p.m.  2nd Team Planning Session (see Team Meeting Location sheet)

12:00p.m.—1:15p.m.  Lunch/Youth Panel—CC, Hall B
1:30p.m.—2:30p.m.—Break out sessions

Empowering Will Light the Way—Deb Chapman, Fannie Evans, Forrest City School District—CC, Room 102-103
The NEXT S.T.E.P. Curriculum is used for the ninth grade transition classes. Students learn how to use important self-evaluation skills, as well as, how to choose goals and activities in the transition areas of personal life, education and training, jobs, and living on your own. Students are encouraged to take charge of a personal IEP/transition planning meeting.

OMG! How do I Add A/T to the IEP ASAP?—Paul Johnston, ATS—CC, Room 207
This presentation will include an overview of Assistive Technology centering on Planning and Transition. It will also have demonstrations of some common Assistive Technology.

Using the National Post School Outcomes Toolkit—Jody Fields, Holly Chason, Arkansas IDEA Data and Research Office—CC, Rooms 201-202
Learn about the NPSO Toolkit and how it can help you analyze and present your data. Learn to update and modify information in the toolkit to present your districts data to a variety of audiences.

Outreach to Co-Teach—Nonnie Carroll, Amy Oswalt, Forrest City School District—CC, Rooms 104-105
Finding time to teach transition skills to co-teach students is difficult. In this session we will discuss the development of our co-teaching transition program, including those strategies that we felt were unsuccessful. We feel that transition should be ongoing and ever changing. Join us on this wonderful ride!

SPP/APR Indicator 13: Writing Postsecondary and Annual Transition Goals—Jennifer Coyle, National Secondary Transition Technical Assistance Center—CC, Rooms 203-204
This presentation will be an SPP/APR Indicator 13 refresher, with an emphasis on writing postsecondary and annual transition goals, along with a comprehensive look at all of the components of Indicator 13.

2:30p.m.—3:00p.m.  Poster Sessions/Snack Break; various school districts—CC, Hall B
Come and join us for a snack break and some great examples of how different transitions classes, programs and fairs can be around the state!

• Monticello High School – How to Have a Successful Parent/Agency Fest
• Kerry Evans – McGehee High School – New Transitions Lab – The Results
• Deb Swink – LEA Clinton Schools - Check & Connect – Dropout Prevention Program
• Carrie Tuttle – Transition Consultant – College Bound
• Tina Mankey – UCA – So Do You Think OT has a Role in Transition Planning?
• Denise Files – Brinkley High School – Transition is Learning about Beginnings
• Annette Nalls – Monticello High School – Implementing Integrating Ideas
• Tamara Clark – White Hall High School – Transition Classes from I – IV Paige Dillinger & Rayfield Walker – Forrest City High School – “Learning to Live/Transition Tuesdays”
• Cheryl O’Neal – Crossett High School – Beginning Community Based Employment for Students
• Allison Dyer – Consortium Teacher Monticello/Drew Central – Successfully Assessing the Severe Profound Student for Transition
• Rene Burkholder – Dumas High School – Using Take Off! in your Transitions Class
• Melissa Higginbotham/Casey Brown – Arkansas School for the Deaf – Team READY
• Lucille Polk – Forrest City High School - A Transitions Class for the Self Contained
• JoAnn Johnson – West Memphis High School – Real Life Transition
• Angela Jackson – Monticello Middle School - Transition Classes at Middle School!
• Michelle Black & Laura Cunningham– DeWitt High School - ????
• Tad White – Fort Smith Schools - ?????
Session Descriptions, October 12-13, 2010

3:00p.m.—4:30p.m.  3rd Team Planning Session (see Team Meeting Location sheet)

4:30p.m.—5:00p.m.  Facilitator Debriefing (Facilitators Only) - CC, Rooms 207-209

7:15a.m.—8:00a.m.  Continental Breakfast—CC, Hall B

8:00a.m.—8:15a.m.  Overview of the Day, Jennifer Coyle—CC, Hall B

8:30a.m.—9:30a.m.  Breakout Sessions

iTunes U & You!—Shelley Dirst, ADE;  Paul Johnston, ATS—CC, Room 207

So You Think OT Has a Role in Secondary Transition Planning?—Tina Mankey, UCA—CC, Rooms 201-202
This session will focus on best practice of using occupational therapy services in secondary transition planning. An overview of secondary transition planning and the role of occupational therapy in public schools will be provided. Illustrations on how occupational therapy services can be implemented or utilized in secondary transition services will be given. In addition, the factors that facilitate or limit occupational therapy services within secondary transition services will be discussed.

Using the new Kuder® Navigator for Career-Focused Planning—Ruth Brown, KUDER—CC, Rooms 102-103
This session will give instructors ideas on how to use the Kuder® Navigator, and how to guide students to a more career-focused education and life planning, and how to use the system to meet IEP requirements. This comprehensive system will astound and amaze, and provide teachers and advisors with the tools and resources needed to afford their students more opportunities to achieve career goals.

Self-Advocacy—Ft. Smith—CC, Rooms 104-105

Arts, Rehabilitation Services in the Schools: Catching Students Early—Eddie Hansford, Arkansas Rehabilitation Services—CC, Rooms 203-204
Three years ago, Rehabilitation Services Administration declared that ARS increase focus on Transition in the schools. ARS’s yearly pattern of action was to call and visit with students once regarding their IEP plans. We basically signed up 80% of those we spoke to at each school. We closed 80% of those and about 10% graduated from some kind of post-secondary education. Ms. Judy Smith was hired to develop a program where Transition services were primary. We enter in the 10th grade and follow those referred until age 21. Throughout the years w would offer individualized counseling and guidance emphasizing post-secondary education with timely preparation.

9:30a.m.—9:45a.m.  Morning Break, CC Hall B

9:45a.m.—10:45a.m.  4th Team Planning Session (see Team Meeting Location Sheet)

11:00a.m.—12:00p.m.  Closing Session—Team Report Out—CC, Rooms 207-209
2008 Arkansas Transition Summit
"Focusing on What Matters in Arkansas"
February 6-7, 2008
Hot Springs, Arkansas
February 6, 2008

Dear 2008 Arkansas Transition Summit Attendees:

It is so thrilling to be holding our third annual Transition Summit! For those of you who have attended in the past, you know we've come a long way. For those who are just joining a team and attending the Summit, we hope your experience is a motivating and productive one.

For over two years we have worked with the staff at the National Secondary Transition Technical Assistance Center (NSTTAC), and we have learned so much in that time. Paula Kohler, Jennifer Hill, and Catherine Fowler were here to help us last year when we completely changed our "focus" and the format of our Summit to incorporate Paula Kohler's "Taxonomy for Transition Programming: A Model for Planning, Organizing, and Evaluating Transition Education, Services and Programs." It really helped us gain a new perspective and focus on what matters in our own communities. The results of last year's Summit were amazing! Teams were so excited and motivated to jump right in and get their team plans going! We have seen some great results from team plans and we know we will continue to see more every year.

We are fortunate to have the support of the Special Education Unit of the Arkansas Department of Education, the many agencies in the state who have contributed time and money toward our efforts, the national consultants from NSTTAC, but most of all, the wonderful, caring teachers in our state who know that hard work pays when it comes to students with disabilities. Thank you for all the work you do here at the Summit and throughout the rest of the year keeping the focus on what truly does matter in Arkansas.

We hope you enjoy your time and we thank you for coming and working towards positive post-school outcomes for students with disabilities.

Sincerely,

Bonnie Boaz
Arkansas State Transition Coordinator
Thank you! Merci beaucoup! Gracias! Dankel Grazie!

The Arkansas Department of Education, Special Education, Transition Services would like to give a special thanks to the Department of Workforce Education, Division of Rehabilitation Services and the Arkansas Department of Health and Human Services, Division of Services for the Blind. Their generosity in providing the “Little Italy” luncheon and help in planning and participating in the Summit is greatly appreciated! Thank you!

Also, a big thanks goes to the Division of Career Development and Transition for their generous donation toward the Exhibitor Social!

A special thanks to our Exhibitors!

Please visit the Exhibit Booths in the Grand Lobby of the Convention Center!
2008 ARKANSAS TRANSITION SUMMIT
FOCUSING ON WHAT MATTERS IN ARKANSAS
FEBRUARY 6, 2008

2:15-3:15 Breakouts:

"Building Transition-Rich IEPs," Paula Kohler—CC 203

"Age-Appropriate Transition Assessment: What Resources are Out There?" Catherine Fowler—CC 201-202

"Self-Determination: How to Promote It," Michael Wehmeyer—CC 205

"Local Transition Teams As a Tool for Interagency Collaboration," Ginger Blalock—CC 204

3:15-5:00 2nd Team Planning Session—see pink paper w/ various room assignments

5:00 Facilitator De-briefing (Team Facilitators Only)—CC 207-209

Dinner on your own

5:00 – 6:30 p.m. Exhibitor Reception (light hors d'oeuvres)—Grand Lobby, Convention Center

FEBRUARY 7, 2008

Arkansas Transition Summit, Day 2
February 7, 2008

7:15 – 7:45 Continental Breakfast/Exhibitors—Grand Lobby, Convention Center

7:45 – 8:00 Overview of the day—CC 207-209

8:00 – 9:30 3rd General Session—"Local Transition Teams As a Tool for Interagency Collaboration: Their Use, Their Support, and Their Sustainability," Ginger Blalock, New Mexico—CC 207-209

9:30 – 9:45 Break—Exhibitors—Grand Lobby, Convention Center

9:45 – 10:30 Breakouts

"Interagency Collaboration," Libby Wolf/Freddie Smith-ARS—CC 203

"Yes, You Can Work: School to Work Transition," Betsy Barnes Scott Holladay-DAAS—CC 204


"CHIRP: One Model for Interagency Collaboration," Peggy Hale-U of A—CURRENTS—CC 205

10:30 – 11:30 4th General Session—"A Bridge to Where? Self-Determination, Student-Involvement, and Transition" Michael Wehmeyer—CC 207-209

11:30 – 1:15 Working Lunch/3rd Team Planning Session—see pink paper w/ various room assignments

1:15 – 2:00 Breakout Sessions—Student Focused Planning

"Planning for Their Future," Carilyn Rouyer, Jane Jarboe-Walnut Ridge HS—CC 203

"Successes and Failures in Getting Kids to Work," Kaye Cripps, Eddie Hansford—Gentry—CC 205

"All About Me: Self-Determination in the Classroom," Tammy Sumners—Hector—CC 201-202

"Can't Today, Can Tomorrow," Adam Kirk-Workforce Center—CC 204

2:00 – 2:15 Break

2:15 – 3:15 4th Team Planning Session—see pink paper w/ various room assignments

3:15 – 4:00 Closing Session—Team report-out—CC 207-209
Paula D. Kohler, Ph.D., is a Professor in the Department of Special Education and Literacy Studies at Western Michigan University and previously a senior research associate with the Transition Research Institute at the University of Illinois. She also co-directs the National Secondary Transition Technical Assistance Center. Dr. Kohler conducts research regarding effective transition practices for youth with disabilities, including effective transition programs, transition-related competencies, career and technical education experiences, work-based education, and other aspects of transition-focused education. Dr. Kohler has accomplished this work through a variety of federally funded grants supported by the U.S. Department of Education and the National Science Foundation. Her Taxonomy for Transition Programming is recognized around the US as an effective model for planning, implementing, and evaluating transition-focused education for students with disabilities, and has influenced the implementation of transition services in a number of states. Dr. Kohler has a background in business administration, educational leadership, career and technical education, and special education. In 2001, Dr. Kohler received the Oliver P. Kolstoe award from the Council for Exceptional Children's Division on Career Development and Transition in recognition for her contributions through research and scholarship. In 2005, Dr. Kohler received the WMU College of Education's outstanding scholarship award; and in 2006, Paula was recognized by the Association on Career and Technical Education Research with the Outstanding Research Paper award at their national conference.

Dr. Catherine Fowler is the Project Coordinator for the National Secondary Transition Technical Assistance Center (NSTTAC). In this role she coordinates the work of the center across three sites (UNC Charlotte, WMU, ASU), including coordinating activities of other staff members, developing products, corresponding with state education agencies, providing professional development, and coordinating the communication among staff and stakeholders. Prior to her current role, Dr. Fowler was the project coordinator for two OSEP funded grants regarding model programs in self-advocacy and self-determination. She previously was employed as a developmental disabilities specialist for infants and toddlers at risk of or with disabilities. Her teaching experiences were with middle school students with autism and elementary students with cognitive disabilities. Dr. Fowler received her MEd and PhD in special education from the University of North Carolina at Charlotte and her BA from Wake Forest University.

Ginger Blalock is an educational consultant in the area of career development and transition for youth with special needs, currently serving as facilitator for the NMPED-funded Transition Outcomes Project and Statewide Transition Coordinating Council, advisory board member for Lifework Learning Division of N.M. Technet, and educational consultant for Technet's administration of the NM Dept. of Workforce Solutions' WIRED (Workforce Innovation in Regional Economic Development) Project. She retired from 21 years at the University of New Mexico, where she held a number of roles, including Division Director for Educational Specialties, Program Coordinator for Special Education and Coordinator for the Special Education Emphasis in Learning and Behavioral Exceptionalities. Her areas of research and development have primarily focused on preparing youth with special needs for adult life activities.

Michael L. Wehmeyer, Ph.D. is Professor of Special Education; Director, Kansas University Center on Developmental Disabilities; and Senior Scientist, Beach Center on Disability at the University of Kansas. Dr. Wehmeyer is engaged in teacher personnel preparation and directs multiple federally funded projects conducting research and model development pertaining to the education of students with intellectual and developmental disabilities. He is the author of more than 200 peer-reviewed articles or book chapters and has authored or edited more than 20 books on disability and education related issues. In 1999 Dr. Wehmeyer was the inaugural recipient of the Distinguished Early Career Research Award from the Council for Exceptional Children's Division for Research. Dr. Wehmeyer holds undergraduate and Masters degrees in special education from the University of Tulsa and a Masters degree in experimental psychology from the University of Sussex in Brighton, England, where he was a Rotary International Fellow. He earned his Ph.D. in Human Development and Communication Sciences from the University of Texas at Dallas.

Betsy Barnes is Program Administrator for the EmployAbility Project with Division of Aging and Adult Services. She earned a Master's degree in Public Administration from UALR and has years of experience administering Supported Employment and other employment assistance programs. She is a strong advocate for individuals with disabilities and serves on numerous committees, such as: Supported Employment Network of Arkansas, Arkansas Disability Coalition, Can Do Inc., Central Arkansas Workforce Investment Board and Pulaski Co. ADA Advisory Council.
Kaye Cripps is a transition/job coach for the Gentry, Decatur, Gravette, and Pea Ridge school districts. She is currently the Parent Involvement Coordinator for Gentry Middle School and is the chairperson for the Nutrition and Physical Activity Advisory Committee for the Gentry School District. She received her Master's degree at the University of Arkansas and her Master's degree at the University of Phoenix Arizona. Kaye also started the WATCHD.O.G.S. Dads program at Gentry Middle School. She is married and has four children.

Carri George is an organizational consultant with the University of Arkansas CURRENTS, providing training and technical assistance in the areas of independent living, transition and advocacy. The former director of a center for independent living in Texas, Carri has worked in the field of independent living for over 20 years. Carri is native Texan and graduate of the College of William and Mary in Virginia and currently lives in Hot Springs. She is the mother of two college-age young people in the process of making the transition to adult roles.

Peggy Hale is a nationally Certified Rehabilitation Counselor with over ten years experience in the field of rehabilitation. She worked as a transition counselor for MS Dept. of Rehabilitation Service, as well as Louisiana. She received her Bachelor's degree from the University of Maryland in Business Management in 1988, and a Master's degree in Rehabilitation Counseling from Mississippi State University in 1996. She completed a nine hour Community Placement Training Program at Auburn University in July 2002.

Eddie Hansford completed a degree in Psychology from NTSU followed with a Masters in Counseling. He became certified as a Vocational Teacher with several teaching and counseling areas at the Jr. and Sr. High levels. Mr. Hansford worked as a Special Education Counselor with several school districts in Central Texas. He then completed another Masters Degree at the U. of A. in Rehabilitation Counseling and subsequently became a Certified Rehabilitation Counselor. He has worked with the Department of Rehabilitation Services at the Hot Springs Rehabilitation Center as a Transition Counselor and as a Field Counselor in the Fayetteville Field office, where he is now the Transition Counselor for the high schools in NW AR.

Scott Holladay is Project Director for the National Academy for State Health Policy. His primary responsibility is directing the EmployAbility Project for the Arkansas Division of Aging and Adult Services. He has nearly 19 years experience working on aging and disability policy issues, including Medicare, Medicaid, home care, and disability employment. He has a Master's in Public Administration.

Jane Jarboe began her career as a Special Education Supervisor in 1976. After nine years she decided to be home with her three sons. She returned to the field as a Middle School Resource Teacher three years later. She has been at Walnut Ridge High School for seventeen years.

JoAnn Johnson has been a teacher in various districts in Tennessee and Georgia. She has served as Special Education Coordinator, Transition Consultant, and Service Learning Coordinator. She is currently Transition Specialist for the West Memphis School District and a proud recipient of a Sam's Wholesale Club Award for starting a Transitions class. Ms. Johnson was recently spotlighted in the Transition Tracks newsletter and is the mother of two, Jaden and Junius.

Adam Kirk is a Youth Coordinator with the Arkansas Workforce. He has worked with the most-in-need youth for the past five years. Adam is actively involved in his community as an adult mentor with the juvenile probation office and volunteers with many other organizations such as, Boy Scouts of America, and Habitat for Humanity. He currently lives in Malvern with his incredible wife, Jamie.

Carlynn Rouyer graduated from Lamar University with a degree in Elementary Education. She later earned her P-12 certificate in Special Education. She will proudly graduate this May from William Woods University with a Master's degree in Curriculum and Instruction. She has been in special education for 18 years and is currently a Resource Teacher at Walnut Ridge High School.

Tammy Sumners is a CBI teacher at Hector High School. She is a mentor teacher and is the team leader for the Pope County Transition Team. Tammy is currently the president of Division of Career Development and Transition and is a past recipient of the Transition Award for an outstanding transition program. She lives in Hector with her husband, Steve, and sons, Seth and Boone.

Reverend Freddie Smith graduated from Ouachita Baptist University where he received a Bachelor's Degree in Sociology with a minor in religion and psychology in 1974. He received a Master's degree in Secondary Education in 1975 and a BA degree in Theology in 1981. Reverend Smith has served as Senior Counselor for the Department of Rehabilitation Services for 30 years. He has been actively involved in the transition of youth with disabilities for many years and is currently on the Southwest AR local transition team.

Libby Wolf, MRC, CRC has worked as a Counselor for the Department of Rehabilitation Services/Office for the Deaf & Hearing Impaired for 15 yrs. She has been blessed to have worked with the Independent Living aspect of DRS allowing her to work with all ages educating the public on ADA and Accessibility as her primary job. Prior to this position, Ms. Wolf worked in the school districts for 12 years including the North Dakota School for the Deaf. Ms. Wolf earned her BS degree in Elementary Education from Western Kentucky University and her MS degree from UALR. She earned her CRC in 2004 and is a graduate of Leadership Institute, Oklahoma State University. She continues to work with students and parents and is currently the Chairperson SWAR Transition Team.
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A little bit about the Youth Panel...

Dylan Nulph is currently a senior at Clinton High School. Dylan lost his hearing two weeks before his second birthday due to meningitis. That never seemed to get in his way though. This determined young man will graduate this May and will head to Rochester, NY, to attend the Rochester Institute of Technology. He plans to major in Computer Graphic Design leaning toward Game Design while obtaining a minor in Cartooning and Drama. Dylan showed us all that he is college material when he attended College Bound last summer. Good luck Dylan!

Bethany Baldwin is a sophomore at Henderson State University. She is seeking a major in Psychology and a minor in Anthropology. Bethany has maintained a 3.5 G.P.A. and is involved in many student activities. This includes being a Reddie Ambassador, a tutor for the Disabilities office, an International student advisor, and a sister of the Alpha Sigma Tau house; among other activities. She is an active member of the Disability community by volunteering her time as a counselor for programs that help prepare young adults with disabilities for higher education and by being a spokes-person for the Can Do committee.

Carnell King is a graduate of Arkansas High School in Texarkana, AR. Carnell struggled to stay in high school but with the help of one of his favorite teachers, Mr. Edgar Piggie, he managed to graduate. His hard work and efforts paid off as he is now the owner of three barber shops, "The King of Fades," in Little Rock. Carnell loves his job and is currently enjoying his success with his wife and two children. He lives in Little Rock.
A COLLEGE TRANSITION
PROGRAM FOR STUDENTS
WITH DISABILITIES

UNIVERSITY OF CENTRAL ARKANSAS
JUNE 18 – 20, 2008

College Bound Arkansas is sponsored by the Arkansas Department of Educa-
tion, Special Education Unit, Transition and the University of Central Arkan-
sas.

The transition to college is a challenge for any student. For students with
disabilities who need accommodations to access services and programs,
the transition can be even more challenging.

AM I COLLEGE BOUND?
“What do colleges have in the way of assistance?”
“What accommodations and services do I need to be successful in college?
“Do the colleges I’m interested in offer this assistance?”
“What type of college best serves my needs and interests?”

College Bound Arkansas will increase students’ knowledge of accommodations,
assistive technologies, leadership skills, and other exciting aspects of college life.
The program is open to entering high school juniors, seniors and college freshmen
who reside in Arkansas.

For more information contact Carrie Tuttle at (501)329-7400 or
tuttle@conwaycorp.net

Thank you to the Facilitators of the 2008 Arkansas Transition Summit—we
appreciate your time and hard work! We couldn’t have done it without YOU!

Linda Teeter—Arkansas Department of Education, Special Education Unit
Scott Holladay—National Academy for State Health Policy
Stacy Lynch—Lake Hamilton Schools
Roy Albert—Department of Rehabilitation Services
Robert Sanders—Department of Rehabilitation Services
Terry Stevenson—Department of Rehabilitation Services
Barbara Lewis—Department of Rehabilitation Services
Karen Anderson—Department of Rehabilitation Services
Rebecca Austin—Special Education, Bauxite
Lisa Bryant—Special Education, Morrilton High School
Betsy Barnes—Division of Aging and Adult Services
Lia Lent—LCSW
Michele Ellis—Early Childhood, Monticello
Bernie Quell—Division of Aging and Adult Services
Lisa Johnson—Arkansas State Improvement Grant
Jennifer Hill—NSTTAC, Western Michigan University
Tina Mankey—University of Central Arkansas

Thanks for attending the 2008 Arkansas Transition
Summit! Drive safely!

Please Plan to attend the 2009 Arkansas Transition Sum-
mit with your local transition team. Watch our website;
www.highschoolmatters.com for details!
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Outside cover art...

Allison Timm, a sophomore at Bismarck High School created the “Green Fairy” artwork above and submitted it to be used at this year’s Transition Summit. She states that as a child her father would encourage her to draw when she became bored and a little “annoying.” Allison obviously enjoyed it and found that she has true talent. “Art is really the essence of freedom and I love it. When I draw I can create anything I want because my art is for me to enjoy. It’s the only time I can truly be unaffected by people’s harsh opinions of me. My art is something I’ve made and is an extension of my inner self and expresses my opinions in a subtle way. I love art so much that I’d probably go nuts without it!”

Thanks to Allison for sharing her talent with us and thanks to her Dad for encouraging her!
"Enhancing School Engagement, School Completion, and Post-school Outcomes for Students with Disabilities"

NEW MEXICO SUMMER TRANSITION INSTITUTE
JUNE 8-11, 2008
SAGEBRUSH INN & CONFERENCE CENTER
TAOS, N.M.

INSTITUTE AGENDA

SUNDAY, JUNE 8, 2008 - Pre-Institute Activities
(optional except for facilitators)

4:30-6:30 2008 Team Tool Facilitator Training
(mandatory for all facilitators)

Chamisa I

4:30-6:30 REGISTRATION (check in and collect materials;
also available Monday in Conference Center Lobby)

Lobby

Remainder of evening . . . get checked into the Inn, relax,
and prepare to learn, enjoy, and work hard for two and a half days!

SPONSORED BY:
• NEW MEXICO PUBLIC EDUCATION DEPARTMENT
• REGIONAL EDUCATION COOPERATIVES 4 AND 6
• NATIONAL SECONDARY TRANSITION TECHNICAL ASSISTANCE CENTER
• NATIONAL DROPOUT PREVENTION CENTER FOR STUDENTS WITH DISABILITIES
• NEW MEXICO DEPARTMENT OF HEALTH DEVELOPMENTAL DISABILITIES SUPPORTS DIVISION
• UNIVERSITY OF NEW MEXICO CENTER FOR DEVELOPMENT AND DISABILITY
• NEW MEXICO DIVISION ON CAREER DEVELOPMENT AND TRANSITION
• STATEWIDE TRANSITION COORDINATING COUNCIL
MONDAY, JUNE 9, 2008

7:30-on REGISTRATION and REFRESHMENTS Lobby

8:15-10:15 Welcome: Dr. James Alarid, Ben Lujan Policy & Chamisa I Leadership Institute, N.M. Highlands University

Blessing: Mr. Richard Archuleta, Taos Pueblo

Purpose: Ms. Cynthia Romero, Education Administrator (Transition Specialist), Special Education Bureau, New Mexico Public Education Department

Opening: Ms. Denise Koscielniak, State Director of Special Education, New Mexico Public Education Department

Overview of Institute and Introduction of Keynote Speaker: Dr. Paula Kohler, Co-Director, National Secondary Transition Technical Assistance Center

KEYNOTE: Dr. Loujeania Bost, Director, National Dropout Prevention Center for Students with Disabilities

“Navigating the Course of School Completion: Are We Willing to ROW?”

Today’s teachers, administrators, and related support personnel must respond to a host of new challenges, mandates, and missions while trying to improve outcomes for all youth. To do so, we must often individually and collectively challenge and adapt our belief systems to address the needs of youth with disabilities. In this keynote session, Dr. Bost discusses three key ingredients (Responsibility, Opportunities, and Will) for keeping youth with disabilities in school through graduation.
10:15-10:30 **BREAK and FIND TEAM LOCATIONS** (see separate list)

10:30-12:50 **Team Session I**

*(includes working lunch which will be provided @ 11:30 at the Conference Center to take back to your team sites)*

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<th>1:00-2:15</th>
<th>ROUND 1 CONTENT SESSIONS</th>
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<td><strong>YOUR DATA – What They Tell You, How to Use Them</strong></td>
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**“Integrating State Performance Plan (SPP) Indicator Data and Their Monitoring into the Educational Plan for Student Success (EPSS)”**:  
*Cynthia Romero, NMPED Special Education Bureau; Janice Ruf, Clayton Schools Special Education; Theresa Golden-Griffin, Rio Rancho Schools Secondary Special Education*

Participants will actively participate in the process of integrating the State Performance Plan (SPP) Indicators into the Educational Plan for Student Success (EPSS). You will learn strategies and see how other districts are monitoring their data in their EPSS.

**“Looking for Clues – Identifying Youth Who Are at Risk of Dropping Out”**:  
*Dr. Matthew Klare, National Dropout Prevention Center for Students with Disabilities*

This session will focus on data that can be used at the school and student level to identify areas of need and risk, as related to school completion and dropout. It will describe several school-level indicators and present guiding questions to assist schools in examining those factors. Next, it will describe signals to look for in middle-school students to identify dropout risk. Finally, we will preview an Excel-based risk calculator that schools can use to identify at-risk students and indicate the type of intervention they might need.

**“Changing Our Lens – Using What We Know to Improve What We Do”**:  
*Dr. Paula Kohler, National Secondary Transition Technical Assistance Center*

State and federal mandates require that we collect a variety of data regarding our transition education, services, and outcomes of our students. With a few strategies, we can use this information to tell us what’s working and what’s not. This presentation will provide examples of how we can make our data work for us.
2:15-2:30       **BREAK**

2:30-4:20       **Team Session II**  
                *Team Sites*

4:30-5:15       **Facilitator Debrief**  
                *Chamisa I*

4:45-6:15      **New Mexico Division on Career Development, Exhibitors, and Networking Reception!**  
                *Chamisa II*

- **Talk with Agency Staff** who have key resources for youth in transition

- **Take part in Cadre Connections** roundtable presentations:
  - Center for Self-Advocacy opportunities & resources
  - *Transition Planning Inventory* (TPI) as schoolwide tool for planning and data-based curricular decisions
  - *REC IX Guidelines* for Quality Transition Planning
  - Customized Employment Using the Employment Planning Process
  - School Showcase Strategies: Improving Graduation Outcomes
  - School Showcase Strategies: Student-led IEPs
  - Transition Resources for Youth Who are Deaf/Hard of Hearing

- **Share delicious refreshments** sponsored by NM DCDT

- **Witness NM DCDT** awards for excellence in transition services

- **Check your eligibility** for door prize drawings

- **Thank your various sponsors**, especially NMPED and our national partners, for this event!

- **Meet other members** of our statewide transition community you don’t already know, including those from different agencies, to learn strategies and resources that improve adult outcomes
# Tuesday, June 10, 2008

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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| 7:30-12:00    | Registration & Refreshments<br>
|               | Lobby                                                                |
| 8:00-8:15     | Overview of Day: Paula Kohler<br>
|               | Chamisa I                                                            |
| 8:15-9:15     | Keynote: Young Adult Panel<br>
|               | “If I were to design a transition program, it would look like …”<br>
|               | These “life experts” represent various ages and stages of transitioning from secondary to post-secondary outcomes (higher education/training, employment, etc). In response to questions by moderator Susan Lancaster, they each will share what worked for their transitions, what didn’t, and what they would recommend. |
| 9:15-9:30     | Break                                                                |
| 9:30-10:45    | Round 2 Content Sessions<br>
|               | Student-focused planning - making education relevant so students stay in school and graduate<br>
|               | **Chamisa I**                                                        |
|               | “Improving Life Outcomes for Adolescents with Emotional and Behavioral Disorders”: Dr. Deanne Unruh, National Postschool Outcomes Center; Marilyn D’Ottavio, Albuquerque Public Schools; Ginny Johnson, N.M. Dept. of Health Long-term Services Division<br>
|               | This presentation will provide a brief overview of the characteristics of youth with emotional and/or behavioral disorders (EB/D) along with the challenges in providing transition services to this high risk population. Effective collaborative service strategies between schools and community-based agencies (e.g., vocational rehabilitation, mental health) will be described that can support a young adult with EB/D to achieve positive life outcomes with examples of successful New Mexico programs. |
|               | **Chamisa II**                                                       |
|               | “Culturally Competent Self-determination: Promoting ALL Students’ Involvement in the IEP Transition Process”: Juan Portley, University of Oklahoma Zarrow Center<br>
|               | This session will involve a candid interactive discussion regarding minority student and family involvement in the transition process and how schools achieve self-determination components for communities from diverse backgrounds. |
“Summary of Performance as a Partnership Vehicle”:  
Nancy Phipps and Teresa Cunningham, Carlsbad High School; 
Theresa Golden-Griffin and B.J. Hartford, Rio Rancho High School

This session will feature the Summary of Performance (SOP) framework used by two different schools to support students in their transitions to eligibility-driven systems. In particular, the ways in which these SOPs have enhanced partnerships with higher education and adult agencies in their regions will be shared. Audience sharing and questions will be an important part of the session.

10:45-12:00 Team Session III  
12:00-12:45 LUNCH at the Conference Center – you decide how to spend the time (perhaps with team input?)

1:00-2:15 ROUND 3 CONTENT SESSIONS  
STUDENT DEVELOPMENT – Academic, Behavioral, Overall

“When They Miss School, Everybody Loses: Strategies to Improve School Attendance”: Dr. Loujeania Bost & Dr. Matthew Klare, National Dropout Prevention Center for Students with Disabilities

In this session, presenters will share negative forces that impact attendance, research findings on effective practices in attendance and truancy, and tips for taking action at the local level. Recommendations for administrators, teachers, and parents will be shared.

“Positive Behavior Supports: An Evidence-based Strategy to Enhance Student Success” - Kristine Noel, REC IX

Positive behavior supports will be explored as one evidence-based strategy to support effective outcomes for all students. Participants will learn what PBS looks like in a school, examine the evidence base for PBS, and become familiar with one tool to guide assessment and team action planning around the essential elements of effective schoolwide behavior support systems. Information on training opportunities will be shared.


This presentation will examine the connection of high school redesign with inclusive practices within career pathway programs. We will look at a collaborative consultation model integrated in career pathway programs, cluster knowledge and skill standards included in the curriculum.
as well as for student goals, and weaving in work based learning opportunities. We will look at national data regarding implementation of career cluster programs.

“Strategic Intervention Model (SIM): An Evidence-based Academic Support Piñon Approach”: Dr. Ginger Blalock, Consultant, REC 6 Transition Project

The University of Kansas Center for Research on Learning has conducted 30 years of research and development on adolescent learning and effective strategies. This session will present (a) the Content Literacy Continuum as an Response-to-Intervention framework, (b) Learning Strategies Curricula for youth, and (c) Content Enhancement Routines for teachers. Information on training opportunities and products will be shared.

2:15-2:30 BREAK

2:30-4:15 Team Session IV Team Sites

4:30-5:15 New Mexico Highlands University (NMHU) Chamisa II
Course Credit Enrollees Meet

4:30-5:15 Facilitator Debrief Chamisa I

WEDNESDAY, JUNE 11, 2008

8:00-8:15 Overview of Day: Paula Kohler Chamisa I

8:15-9:45 Team Session V & Evaluation of Institute Team Sites

9:45-10:00 BREAK

10:00-11:45 Teams Report Out Chamisa I

11:45-12:00 Closing Comments: National TA Centers Chamisa I
James Alarid is currently Professor of Special Education and director of the Ben Lujan Policy and Leadership Institute at New Mexico Highlands University. He has provided leadership in the state around transition to adulthood since the mid-1980s and served as a key Special Education faculty member at Highlands throughout that time. Over twenty years ago, he started the first supported employment program in New Mexico, Vistas Sin Limites, which continues today, and more recently he helped initiate youth leadership forums for teens with developmental disabilities. His expertise in support programs for young adults with significant support needs has led to frequent requests for his involvement in evaluating such programs around the nation. He serves as Chair of the Statewide Transition Coordinating Council and as member of the Developmental Disabilities Planning Council, among many other roles in New Mexico.

Ginger Blalock is an educational consultant in the area of career development and transition for youth with special needs, currently serving as facilitator for the NMPED-funded Transition Outcomes Project and Statewide Transition Coordinating Council, advisory board member for Lifework Learning Division of N.M. Technet, and educational consultant for Technet’s administration of the NM Dept. of Workforce Solutions’ WIRED Project (Workforce Innovation in Regional Economic Development). She retired from 21 years at the University of New Mexico, where she held a number of roles, including Division Director for Educational Specialties, Program Coordinator for Special Education, and Coordinator for the Special Education Emphasis in Learning and Behavioral Exceptionalities. Prior to UNM, she worked at Austin Community College as a career counselor with adults with disabilities and managed a paraprofessional training program. She also taught two years at Dripping Springs Jr./Sr. High School and one year at Ganado Elementary School, both in rural Texas towns. Her areas of research and development have primarily focused on helping educators prepare youth with special needs for adult life activities, particularly employment, within a collaborative framework.

Loujeania Williams Bost is the director of the National Dropout Prevention Center for Students with Disabilities (NDPC-SD) at Clemson University. Dr. Bost is responsible for
all operational aspects of the Center, including the development of strategic partnerships. NDPC-SD is a national technical assistance and dissemination center funded by the USDE/OSEP. Dr. Bost holds a Ph.D in Special Education from The Pennsylvania State University. She has an extensive background and experience working in state and local education agencies and in community programs. Loujeania has worked with students with disabilities and special education personnel in several states including 13 years with the Pennsylvania Department of Education’s Bureau of Special Education where she served as Chief for both compliance and technical assistance. She has been a public school teacher, a program administrator for agencies serving adults and adolescents with mental retardation, and a researcher. Dr. Bost serves as an advisory committee member of the National Secondary Transition Technical Assistance Center and as part of the technical work group for the National Post School Outcomes Center. Dr. Bost has also held adjunct appointments at Penn State and Temple Universities.

Wendy Corry is currently the Dir. of Developmental Disabilities Services with ValueOptions New Mexico, the managed behavioral healthcare organization for New Mexico. Wendy has over 20 years experience working in the disability community including the NM DOH/DDSD (Developmental Disabilities Support Division), S.C. Protection and Advocacy for People with Disabilities, and various residential community settings as direct staff and management.

Marilyn D'Ottavio is the Coordinator for Transition Services for the Albuquerque Public Schools. She has a an Educational Specialist degree in Administration and a Master's Degree in Special Education from the University of Nebraska-Lincoln. Her professional experience includes two years as a general education English teacher, three years as a special education resource teacher, four years as a vocational evaluator, seven years transition specialist, three years as a program support specialist, and she is currently the Transition Services Coordinator for the Albuquerque Public Schools.

Theresa Griffin-Golden has been the Director of Secondary Special Education with Rio Rancho Public Schools for the past four years. She has completed twelve years in education. She previously served RRPS as an educational diagnostician and Albuquerque Public Schools as a special education teacher with a dual licensure.

BJ Hartford currently serves the Rio Rancho Public Schools as the Director of Elementary Special Education. Although this is her first year as a director she has been
with RRPS for eleven years serving as both a site specialist and a special education teacher.

**Matthew Klare** joined the NDPC-SD in March 2005, coming from American Institutes for Research in Washington, DC. Dr. Klare’s background is in the areas of assessment development and test operations. While at ACT in Iowa City, IA, he was instrumental in the development of the Work Keys system and assessments, as well as ACT’s computerized testing system. At AIR, he worked on alternate assessments, Braille and LEP accommodations for state achievement tests at grades K-8. As Project Coordinator and Research Associate at NDPC-SD, Dr. Klare’s focus is on assisting states in using their dropout and graduation data to identify technical-assistance needs and on developing and delivering technical assistance to build capacity to support school completion.

**Paula D. Kohler**, Ph.D., is a Professor in the Department of Special Education and Literacy Studies at Western Michigan University and previously a senior research associate with the Transition Research Institute at the University of Illinois. She also co-directs the National Secondary Transition Technical Assistance Center. Dr. Kohler conducts research regarding effective transition practices for youth with disabilities, including effective transition programs, transition-related competencies, career and technical education experiences, work-based education, and other aspects of transition-focused education. Dr. Kohler has accomplished this work through a variety of federally funded grants supported by the U.S. Department of Education and the National Science Foundation. Her *Taxonomy for Transition Programming* is recognized around the US as an effective model for planning, implementing, and evaluating transition-focused education for students with disabilities, and has influenced the implementation of transition services in a number of states. Dr. Kohler has a background in business administration, educational leadership, career and technical education, and special education. In 2001, Dr. Kohler received the Oliver P. Kolstoe award from the Council for Exceptional Children’s Division on Career Development and Transition in recognition for her contributions through research and scholarship. In 2005, Dr. Kohler received the WMU College of Education’s outstanding scholarship award; and in 2006, Paula was recognized by the Association on Career and Technical Education Research with the Outstanding Research Paper award at their national conference.
Kristine Noel, M.S., CCC-SLP, is a speech-language pathologist and the Program Development Coordinator for Region IX Education Cooperative. She also works as a lecturer in the Department of Special Education at the University of New Mexico and as a speech-language pathologist providing speech-language therapy services to children and youth at KidPower Therapy Associates. She is currently working on a PhD in special education at UNM. Kristi holds certification as a SIM Learning Strategy Professional Developer from the University of Kansas and as a New Mexico PBS Trainer. Her professional and research interests include language, literacy, and behavior with high-risk adolescents.

Juan Portley currently attends the University of Oklahoma in the Special Education doctoral program. Prior to admission at OU, Juan worked in New Mexico where he trained teachers on state and federal legislation and curriculum development in transition for special education staff. Mr. Portley earned his M.Ed in special education from Pennsylvania State University in 2001, and worked for five years as a resource teacher, and special education coordinator, and transition coordinator.

Janis Ruf is currently the Special Education Director for Clayton Municipal Schools. She has taught Special Education for over 12 years including in Chicago, IL, and Albuquerque, NM.

Christopher Sanger has been an employee with the State of New Mexico for fourteen years. He has worked for the Children, Youth and Families Division as the Assistant Clinical Director for the Youth Diagnostic and Development Center from 1994 – 2004. From 2004 to the present he has worked for the Department of Health with the Developmental Disabilities Supports Division as a Clinical Counselor/School Psychologist-A. His responsibilities include reviewing files for individuals who seek eligibility for the Developmental Disabilities Waiver. Mr. Sanger has been licensed as an LPCC with the state of New Mexico since 1994. He was in private practice, in Albuquerque, from 1999 – 2007. His therapeutic expertise included issues involving: men, adolescent, marriage and spirituality. Mr. Sanger is married and has two children.

Michael Stanton is currently assistant principal responsible for Special Programs including Special Education and Career Academies at Rio Grande High School in Albuquerque. He is completing his research study for the PhD in Education at UNM in Organizational Learning and Instructional Technology. Mike has consulted in recent years with schools in Albuquerque, Dallas, Chicago, Florida, and South Bend, Indiana.
in high school redesign with career academies and small learning communities. He has taught students with special needs since 1991 while receiving his Masters Degree in Special Education from UNM in 1997. Providing a smooth transition for all students to post secondary programs, education, and employment drives much of his work. His research is concerned with building the framework and supports for teachers in professional learning communities to work collaboratively for greater success for all of our at risk students.

**Deanne Unruh**, Ph.D., is a Senior Research Scientist at the University of Oregon in the College of Education in the Secondary Special Education and Transition (SSET) research unit with research expertise in high risk adolescents involved in the juvenile justice system. She has received $5.3 million of research funding from the U.S. Department of Justice, Office of Juvenile Justice and Delinquency Prevention and the U.S. Department of Education, Office of Special Education Programs, and Institute of Educational Sciences. Her recent work is in collaboration with Oregon’s juvenile justice agency and local community agencies to develop facility-to-community transition programming and target employability social skills for adolescents involved in the juvenile justice system. She is also co-editor with Dr. Hewitt B. Clark of the upcoming book *Transition of Young People with Emotional or Behavioral Difficulties: An Evidence-Informed Handbook*. In 2003, Dr. Unruh was appointed to the State of Oregon Transition (TAC) and currently is a board member and past president of the Oregon Association of Vocational Special Needs Personnel. Prior to coming to the University of Oregon, Dr. Unruh was a teacher and administrator in alternative education schools for high-risk youth in urban settings for more than 12 years. During this tenure she was a certified trainer for the National Diffusion Network and trained state, district, and school staff nationwide on effective instructional strategies for working with at-risk youth.
Third Annual Oklahoma Transition Institute

Metro Technology Center
Springlake Campus

Wednesday, September 3 - Friday, September 5, 2008
**Wednesday, September 3**

9:00-3:00  **Facilitator Training (Lunch will be provided.)** - Paula Kohler  
- Calypso Room  
**Session Description:** This session will prepare team facilitators to work with the regional transition teams throughout the Institute.

1:00-4:00  **Train the Trainer Follow-Up Meeting** - Denise North and Monica McFarlin  
- Alpine Room  
**Session Description:** During the 2007-2008 school year, four regional meetings were held around the state to train trainers to go into local communities and train others in transition services for students with special needs. If you attended the second day of that training, you are requested to attend this preconference session to discuss the trainings you have completed as well as any assistance needed from the Oklahoma Transition Council.

2:00-5:00  **Transition 101** - Kim Osmani and Dr. James Martin  
- Carousel Room  
**Session Description:** This pre-Institute workshop provides an overview of transition education concepts and practices. It will first introduce the Institute format, including a discussion of the team approach and plan development to improve transition education capacity. Second, participants will learn the “why” behind the current emphasis on transition education. Third, participants learn about transition assessment, transition practices including self-determination practices and student involvement in the transition education process, and how to complete the transition IEP pages. This workshop is designed for first-time Institute participants and for those who want a better understanding of basic transition education practices and the Institute’s format.

**Thursday, September 4**

8:30-9:15  **Opening Session**  
- Big Dipper Room  
Welcome - Linda Parker, State Director of the Oklahoma Department of Rehabilitation Services  
Overview of the Oklahoma Transition Institute and Transition Taxonomy - Paula Kohler  
Logistics: The Travel Claim Process - Kim Osmani

9:15-10:30  **Keynote**  
- Big Dipper Room  
Family Involvement - Sean Stephenson

10:30-10:45  **Break**

10:45-12:45  **Team Meeting 1/Working Lunch (Lunch will be provided.)**  
- See specific team room assignments in your packet.

1:00-2:00  **Breakout Session 1**
Breakout Sessions

Transfer of Parental Rights in Special Education - Jo Anne Blades
- Springlake Room
  **Session Description:** When students in need of special education turn 18, they become the decision makers of their own education. Many students are not yet ready to take on this responsibility. What options are available to the parent, to help with their transition? What is the role of the transition team in addressing the student’s transition to the age of majority?

Empowering Families for a Better Future - Nancy Garner and Joni Bruce
- Alpine Room
  **Session Description:** This session is for families and professionals alike. Participants will learn skills for empowering families to meet their own needs. Peer-to-peer mentorship philosophy and how to implement the Oklahoma Individual and Family Support Principles will be addressed.

Families in Student-Centered Roles in the Transition Process - Dr. Donna Wandry
- Big Dipper Room
  **Session Description:** This is an overview of mandatory foundations for parent/family involvement in special education and specifically in transition-related programming. It describes specific literature- and research-based, student-centered roles for parents and families in the transition process. Attendees will have the opportunity to work within an “Indicators of Success” framework to create a foundation for more effective parent partnerships in these roles.

Overview of Rehabilitation Programs for Transition - Teresa McDermott and Shanel Armstrong
- Forrest Room
  **Session Description:** This session is designed to give a basic overview of the cooperative agreement between the Department of Rehabilitation Services and the State Department of Education regarding transition issues and trends. It will examine the relationship that should exist between the rehabilitation professional and each individual school and its personnel—counselor, special educators, etc. It will also cover the protocol for referral and service provision between the two agencies.

Competencies for Transition Coordinators/Creating Transition Coordinators - John Hilborn, Kathy Curtis, Glinna Fleming, Deana Lemons, Linda Modenbach, and Tammie Lore
- Calypso Room
  **Session Description:** This panel discussion deals with transition coordinator competencies and what it takes to create this position in a school district.

Developing a Good Local Transition Team - Allan King and Esther Watkins
- Twilight Room
  **Session Description:** This review of our experiences in developing the local transition teams in our areas—problems encountered, common concerns, recruitment, and plans for the future—will also include a brief history of Vocational Rehabilitation involvement. The need for commitment from VR and the school staff will be emphasized with suggestions for improvement.

Working with Foster Families and Nontraditional Guardians - Nancy Hurst
- Rose Room
  **Session Description:** Transition services to youth in the custody of the state of Oklahoma presents a unique set of challenges. Many of these youth suffer from the after-effects of abuse or neglect and require additional supports and encouragement to succeed academically and vocationally. The possibility of placement and school changes, multiple social workers involved in making decisions for the youth, and high levels of uncertainty regarding future plans also exist. Placement with a legal guardian provides more stability, but many of the background issues for these youth are the same. This workshop will explore both the challenges and rewards of working with youth in out-of-home care.
**Transition Education Opportunities for Students with Disabilities in General Education Classes** - Diane S. Bassett  
- **Carousel Room**  
**Session Description:** Many times, students with disabilities who spend the major part of their day in general education classrooms do not have the time or opportunity to practice transition-focused activities. This presentation will provide a brief overview on how to blend transition-focused competencies into the standards-based world of general education. Participants will receive guidance on ways to collaborate with general education teachers, to use principles of Universal Design for all students, to allow for student self-determination and self-advocacy, and to create relevant educational curricula that reflects a transition focus.

2:00-2:15 Break

2:15-3:15 Breakout Session 2

**Breakout Sessions**

**DRS/OESC Joint Project to Help Individuals with Disabilities Gain Employment** - Marlene Harris and Frank Boswell  
- **Twilight Room**  
**Session Description:** The focus of this session is on a special project with the Department of Rehabilitation Services and Workforce Oklahoma and how special education instructors can access this program to help prepare their students for employment.

**Families in Systems-Centered Roles in the Transition Process** - Dr. Donna Wandry  
- **Big Dipper Room**  
**Session Description:** This is an overview of mandatory foundations for parent/family involvement in special education and specifically in transition-related programming. It describes specific literature- and research-based, systems-centered roles for parents and families in the transition process. Attendees will have the opportunity to work within an “Indicators of Success” framework to create a foundation for more effective parent partnerships in these roles.

**Education for Families of Students of Culturally and Linguistically Diverse Backgrounds** - Juan Portley  
- **Alpine Room**  
**Session Description:** Explore several components of transition difficulties faced by schools serving students from diverse backgrounds. Discussion will include a multicultural view of transition programs and planning components, self-determination for minority students, and parent and student involvement in the planning process. Learn the impact of culture on learning and why postsecondary outcomes for students from diverse backgrounds fall short of expectations and how these results can improve.

**Transition and Assistive Technology** - Sandra Stevenson  
- **Calypso Room**  
**Session Description:** Parents/families need to be directly involved in the process of the student’s program (assessment, service delivery, IEP meetings, natural supports, etc.), but they also need to be empowered and trained to be effective in their role. Parents of students who use or need assistive technology should be provided additional training and exposure to assistive technology. Learn how to provide families the necessary training as described in Kohler’s Taxonomy for Transition Programming.

**Tech Now** - Jeff Arnold, Janet Furr, and Janet Parker  
- **Forrest Room**  
**Session Description:** This session focuses on the Tech Now program and how it addresses the transition to the workplace and postsecondary programs.
Transition Assessments - Deana Lemons
  Rose Room
  **Session Description:** The focus of this presentation is the "free" transition assessments available, including areas and ages covered.

Transition Education Opportunities for Students with Disabilities in General Education Classes - Diane S. Bassett
  Carousel Room
  **Session Description:** Many times, students with disabilities who spend the major part of their day in general education classrooms do not have the time or opportunity to practice transition-focused activities. This presentation will provide a brief overview on how to blend transition-focused competencies into the standards-based world of general education. Participants will receive guidance on ways to collaborate with general education teachers, to use principles of Universal Design for all students, to allow for student self-determination and self-advocacy, and to create relevant educational curricula that reflects a transition focus.

3:15-3:30  Break

3:30-5:00  Team Meeting 2
  - See specific team room assignments in your packet.

5:00-5:30  Facilitator Debrief
  - Big Dipper Room

**Friday, September 5**

8:30-9:00  Opening Session
  - Big Dipper Room
  Welcome - Kim Osmani
  Recap of Yesterday and Overview for the Day - Paula Kohler

9:00-10:00  Keynote
  - Big Dipper Room
  My Journey to Success - Brad Mays
  **Session Description:** Join Brad Mays as he discusses how cerebral palsy has impacted his life, the difficult transitions he has faced, and the important role his family and educators have had on his journey to becoming a college graduate.

10:00-10:15  Break

10:15-11:15  Breakout Session 3
Breakout Sessions

A Blueprint for Providing Transition-Focused Content in a Standards-Based World - Diane S. Bassett
  Carousel Room
  **Session Description:** Students with disabilities can flourish in general education classrooms when opportunities for learning are relevant, challenging, and understandable. Contextual learning (also known as applied academics) blends the concepts of a meaningful transition-focused education with the mandates of standards-based content. This presentation will demonstrate how to incorporate contextual learning into general education curriculum and instruction, either as a sole instructor, or in collaboration with general education content teachers. As you practice these concepts through our two models, you will discover how opportunities for student involvement and empowerment can change the way you teach!

Social Security Work Incentives for People with Disabilities - Jason Price and Janette Crow
  Calypso Room
  **Session Description:** This session will provide people with disabilities the information they need to make an informed choice of entering competitive employment instead of relying on disability benefits. Benefits available through Social Security and Supplemental Security Income will be discussed and the work incentives that apply will be described.

18-21 Community-Based Transition Services - Deborah Thompson
  Big Dipper Room
  **Session Description:** Learn about 18-21 transition services that have been a part of the special education continuum since 1991. Each year the transition staff of eight works with approximately 100 students whose IEPs identify a variety of handicapping conditions. Attendees will be provided examples of reporting and evaluation forms for documenting student progress. Case studies will be shared on students with differing levels of need and support with the focus on district and community collaboration.

How to Involve Native American Parents - Mary Lee
  Twilight Room
  **Session Description:** Transition planning is an important part of a student’s Individualized Education Plan. This session will include an open discussion for audience members to share concerns or issues they have encountered working with American Indian youth. The overall objective is to develop solutions for problems encountered in the transition process of American Indian youth and their families.

Integrating Health Care into Transition Plans—Care Notebooks - Louis Worley and Dee Kessler
  Alpine Room
  **Session Description:** Participants will learn the importance of including healthcare planning in the transition plan and be provided with tools and techniques for supporting youth as they assume more independence with management of their own healthcare.

How to Prepare for the Next Step: Postsecondary Education - Denise North
  Forrest Room
  **Session Description:** Beyond the basic academics, what should students know to enter a technology center or college? Lots of STUFF!! Students need to learn how to discuss their disability, how to ask for services, where to find the service providers, and how to adapt to the rigor of postsecondary education. Then they need to find a job and keep it. Learn what students and their teachers need to know to prepare for these transitions and how to make the transition smoother and easier for all involved.

Developing a Partnership Between Educators and VR/VS Counselors - Robert Eames and Diana Kizor
  Springlake Room
  **Session Description:** This session will assess strategies and recommendations for building effective relationships between teachers and vocational rehabilitation counselors.
Collaboration: The Power of Local Control - Vincent Jay Harper

Rose Room

Session Description: Developing and implementing effective transition plans are a complex process requiring collaborative integrated actions between members of a multidisciplinary-interprofessional team. Collaboration can facilitate and strengthen student-centered services for individuals with disabilities. Learn key ways that local schools can develop collaborative processes through an incremental-participatory approach to address students' transition needs. This session encourages secondary special education teachers to become catalysts in developing a sense of community and a shared commitment to student success in their local schools.

11:15-12:15  Team Meeting 3
- See specific team room assignments in your packet.

12:15-1:15  Lunch Buffet
- Big Dipper Room

1:15-2:45  Team Meeting 4
- See specific team room assignments in your packet.

2:45-3:45  Team Report Out/Closing/Door Prizes
- Auditorium
Committee Members

Marla Baker
Frank Boswell
Joni Bruce
Dana Cantwell
Regina Chace
Mike Chapman
David Couch
Brett Cunningham
Kathy Curtis
Rick DeRennaux
Anita Eccard
Janet Felton
Nancy Garner
Kahle Goff
Theresa Hamrick
John Hilborn
Sharon Isbell
Linda Jaco
Sue Keller
Mary Lee
Pam Lindsey
Valeria Littlecreek
Tammie Lore
Dr. James Martin
Teresa McDermott
Monica McFarlin
Denise North
Kim Osmani
Jacqueline Pereira
Candi Robinson
Anita Selvidge
Mike Shuttic
Louis Worley

Affiliations

Broken Arrow Public Schools
Jenks Public Schools
Metro Technology Center
Norman Public Schools, Norman North High School
Oklahoma Department of Human Services, Developmental Disabilities Services Division
Oklahoma Department of Human Services, Family Support Services
Oklahoma Department of Rehabilitative Services
Oklahoma Department of Mental Health and Substance Abuse Services
Oklahoma State Department of Education, Special Education Services
Oklahoma Department of Career and Technology Education
Oklahoma Development Disabilities Council
Oklahoma Employment Security Commission
Oklahoma Family Network
Oklahoma Rehabilitation Council
Oklahoma State University
Oklahoma Tribal Vocational Rehabilitation Programs, Muscogee (Creek) Nation
Owasso Public Schools
Oklahoma ABLE Tech, Seretean Wellness Center, Oklahoma State University
Parent Training and Information Center of Oklahoma
Tech-Now Inc.
University of Oklahoma Health Sciences Center, Child Study Center
University of Oklahoma, Zarrow Center for Learning Enrichment

Taxonomy for Transition Programming

- Student-Focused Planning
- Interagency Collaboration
- Program Structures
- Family Involvement
- Student Development
**Jason Price** is a program manager with the Oklahoma Department of Rehabilitation Services, overseeing the metro area adult vocational rehabilitation services. He is a former vocational rehabilitation client and statewide speaker on disability etiquette.

- **email**: jprice@okdrs.gov

**Monica McFarlin** is a project coordinator for the Oklahoma State Department of Education, Special Education Services. She serves as a member of the Oklahoma Transition Council and aids in training Oklahoma special education teachers in the area of Secondary Transition. While teaching, Monica taught students with special needs across all grade levels.

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**Deborah Thompson** received her B.A. degree in special education from the University of Northern Colorado, an M.A. in special education from the University of Colorado at Colorado Springs, and a work experience vocational credential from Colorado State University. Since 1973, Deborah has taught students with severe and moderate needs and coordinated high school work experience in Colorado and Wyoming. She has also been a transition coordinator since 1991.

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- **fax**: 719-630-2247
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**Marlene Harris** has worked as a vocational rehabilitation counselor and employment consultant for the Department of Rehabilitation Services for more than 20 years. As a counselor, she helped people with disabilities obtain services they needed to gain employment. As an employment consultant, Marlene now works with businesses and employers in northeast Oklahoma on disability issues in the workplace.

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**Frank Boswell** is the lead navigator for Oklahoma’s Disability Program Navigator Project.

- **telephone**: 580-323-1341
- **fax**: 580-323-9176
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**Dr. Donna Wandry** has worked with children and youth with disabilities for more than 10 years in school and agency settings and as project director for a transition systems change grant at the State Department of Education in Kansas. She is a past president of the CEC Division on Career Development and Transition. Areas of interest include special education legislation, movement from school to adult life for persons with disabilities, and working in school settings to create systemic programming changes to facilitate that movement. A long-time parent advocate, she has written several articles and book chapters.

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**Teresa McDermott** is entering her 18th year with the Department of Rehabilitation Services, having worked as a vocational rehabilitation specialist in the Ada field office for 17 years. She is transition programs manager for the Visual Services Division of DRS with offices in Oklahoma City, Tulsa, and Muskogee, all of which work with visually impaired and diabetic transition students, ages 14-21.

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Janet Furr, special education teacher at Bethany High School, is the program coordinator for Tech-Now. Janet has a master’s degree in special education from the University of Oklahoma and has worked in the Tech-Now program since 1999. She has 30 years of teaching experience in Virginia, Texas, and Oklahoma.

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- fax: 405-912-7978
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- address: 11800 Lanceshire Circle, Oklahoma City, OK 73162

Anita Selvidge has directed the Muscogee (Creek) Nation Vocational Rehabilitation for 10 years and is a fluent Musco-gee language speaker. She became involved in the transition process after seeing the struggles of her grandson, who went undiagnosed with a learning disability until he reached middle school.

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John Hilborn earned a B.S. degree in special education from Illinois State University and his M. Ed. degree from Northeastern State University, where he serves as an adjunct instructor to special education majors. He has worked 30 years in special education and currently serves as the Special Education Department chair and transition coordinator for Broken Arrow Public Schools.

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Denise North, director of Disability Services at Metro Technology Centers in Oklahoma City, helps secondary and adult students with disabilities attend the technology center and works with staff to ensure they receive appropriate services. In the past 16 years, Denise has taught special education K-12, served as a transition specialist at Gordon Cooper Technology Center, and worked as disabilities services specialist for the Oklahoma Department of CareerTech.

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Sandra Stevenson is the assistive technology specialist for Oklahoma ABLE Tech. She provides training and technical support for assistive technology throughout Oklahoma. Sandra received her B.A. in special education from Oklahoma State University. She has extensive experience in working with families and teams, both as a DDSD case manager and director of a provider agency, with a primary focus in residential and vocational services.

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- fax: 405-744-2487
- email: sandra.stevenson@okstate.edu
- address: Oklahoma ABLE Tech, 1514 West Hall of Fame, Seretean Wellness Center, Oklahoma State University, Stillwater, OK 74078

Vincent Harper, a second-year doctoral student in special education at the University of Oklahoma, has 10 years’ experience in teaching and school administration. His research focus is helping local educators develop effective collaborative processes to increase student, family, community, and human service agency involvement in the transition planning process.

- telephone: 405-325-8951
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- address: 840 Asp Avenue, Room 111, Norman, OK 73019
Janet Parker is a Tech Now instructor at Memorial High School in Tulsa, Oklahoma.

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- fax: 918-833-9659
- email: parkeja@tulsaschools.org
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Brad Mays earned his B.A. in journalism and a master’s degree in human relations before co-teaching a MHR course at OU-Tulsa titled Psychological Aspects of Disability in the summer of 2006. He is currently at OU pursuing a master’s in adult and higher education while working at the Zarrow Center for Learning Enrichment as a graduate research assistant.

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- address: 2657 Classen Boulevard, Apartment 2107, Oklahoma City, OK 73106

Shanel M. Armstrong came to Oklahoma from Colorado in 1999 to attend Langston University. After she earned her master’s degree in vocational rehabilitation counseling, she received the Carl Albert internship and has worked the past 3 ½ years for the Department of Rehabilitation Services in the transition unit, where she serves Oklahoma Centennial, Northwest Classen, and John Marshall High Schools.

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- email: sarmstrong@drs.state.ok.us
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Juan Portley is a third-year doctoral student at the University of Oklahoma. His research interests include transition program development, transition planning in rural schools, and the planning process for students from diverse backgrounds.

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- address: 840 Asp Avenue, Carpenter Hall, Norman, OK 73019

Allan King has been a vocational rehabilitation counselor for 33 years with the last 24 years spent working with transition in Rogers County and elsewhere. Allan has initiated numerous transition agreements during those years.

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Kim Osmani earned master’s degrees in special education and educational administration. She taught special education K-12 for 10 years before joining the State Department of Education in 2004. Kim currently oversees data and reporting, grants, personnel development, secondary transition, and mental health.

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Presenter Biographies

**Louis Worley** is state coordinator of Sooner SUCCESS and the University of Oklahoma Health Sciences Center’s Medical Home program, which provides training and technical assistance to primary care practices to improve their support to families of children and youth with special healthcare needs.

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**Dee Kessler** is a practice improvement coordinator with the University of Oklahoma Health Sciences Center’s Medical Home program, which provides training and technical assistance to primary care practices to improve their support to families of children and youth with special healthcare needs.

- **telephone**: 405-271-6824, ext. 45131
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**Janette Crow** began her career with Social Security in 1975 in Tulsa. Following a 16-year break to raise children, she worked in the Office of Hearings and Appeals, the Oklahoma City field office, and now serves as area work incentive coordinator for Social Security in Oklahoma City.

- **telephone**: 405-605-3001, ext. 3002
- **fax**: 405-605-3078
- **email**: p.janette.crow@ssa.gov
- **address**: Social Security Administration, 2615 Villa Prom, Oklahoma City, OK 73107

**James Martin**, Ph.D., holds the Zarrow Chair in Special Education and is the director of the University of Oklahoma’s Zarrow Center. He received his doctoral degree from the University of Illinois. Prior to opening the Zarrow Center in 2000, he was a professor at the University of Colorado at Colorado Springs and the director of the Center for Self-Determination.

- **telephone**: 405-325-8951
- **fax**: 405-325-7841
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- **address**: University of Oklahoma, Zarrow Center, 555 Constitution, Room 119, Norman, OK 73091

**Esther Watkins** has been a vocational rehabilitation specialist for three years in the High School Transition program for the Department of Rehabilitation. She serves as team leader for the Tulsa North/Owasso Transition Team.

- **telephone**: 918-382-7700, ext. 222
- **fax**: 918-583-5414
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**Nancy Hurst** has worked with foster and adoptive families and youth in care in a direct service or training capacity for 18 years. She currently serves as a training specialist for the Department of Rehabilitation and contracts to provide pre-service training to resource families and new child welfare workers.

- **telephone**: 405-635-2774
- **email**: nhurst@drs.state.ok.us
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**Deana Lemons** is a special education teacher of 26 years and special education director for 10 years.

- **telephone**: 918-476-8334, ext. 101
- **fax**: 918-476-8372
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Jeff Arnold has been a teacher/coach in regular and special education in two states over the past 19 years. He currently teaches special education and Tech Now in class and after school in the Bixby Public School System.

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Diane S. Bassett, Ph.D., is a professor in the School of Special Education at the University of Northern Colorado. She has taught general and special education in elementary, secondary, and postsecondary institutions. She is the co-author of two books, *Student-Focused Conferencing and Planning* and *Aligning Transition and Standards-Based Education*:

- **telephone:** 970-351-1648
- **fax:** 970-351-1061
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Robert Eames, CRC, has served as a transition rehabilitation counselor in the Tulsa area for approximately eight years. He is currently working on Project Search with Jenks Public School. He serves as transition team leader for Jenks, Union, Broken Arrow, and Sapulpa Public Schools. He is a member of OK-AHEAD.

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- **email:** rteames@drs.state.ok.us
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Diana Kizer, CRC, LPC, has served as rehabilitation counselor in southeastern Oklahoma for the past seven years. She serves as transition team leader for the Kiamichi Hugo Team and is a member of the Kiamichi Durant Team.

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- **fax:** 580-924-0208
- **email:** dlkizer@drs.state.ok.us
- **address:** VR #7, 801 West Main, Suite A, Durant, OK 74701

Joni Bruce B.S. is the executive director of The Oklahoma Family Network, (OFN) Oklahoma’s Parent-to-Parent and Family-to-Family Health Care Resource and Education Center for families of children with special health care needs. Joni is a graduate of Resolve Through Sharing grief counselor training and Partners in Policymaking. She is the mother of three children. One died from a genetic disorder, and the other two have special needs. Among her many duties are supporting the development of new family leaders who have expertise in their children’s special health care needs and implementing OFNs’s new Family-to-Family grant.

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- **fax:** 405-271-1459
- **email:** jbruceofn@sbcglobal.net
- **address:** Oklahoma Family Network, Inc., P.O. Box 21072, Oklahoma City, OK 73156

Nancy Garner B.S. is the director of Special Projects for The Oklahoma Parents Center, Oklahoma’s Parent Training and Information Center. Nancy is the mother of three children, one of them an adult daughter with developmental disabilities. She has been a teacher, trainer, and child advocate for over 14 years.

- **telephone:** 405-601-1599
- **fax:** 918-619-6147
- **email:** ngarner@oklahomaparentscenter.org
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Business Conference Center (BCC)
Springlake Campus
1900 Springlake Drive

- Conference Rooms
- Possible Conference Rooms
- Team Meeting Locations

Parking
# Agenda

**Tuesday, June 19, 2007**

<table>
<thead>
<tr>
<th>Time</th>
<th>Program</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:30-12:30</td>
<td><strong>Team Leader Orientation</strong></td>
<td>Pine Room</td>
</tr>
<tr>
<td>1:00 pm</td>
<td><strong>Opening and Welcome</strong></td>
<td>Ballroom</td>
</tr>
<tr>
<td></td>
<td>Dr. Ed Steinberg, Assistant Commissioner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Colorado Department of Education</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Overview of Institute: Dr. Paula Kohler</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Co-Principal Investigator, National Secondary</td>
<td></td>
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<tr>
<td></td>
<td>Transition Technical Assistance Center</td>
<td></td>
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<tr>
<td></td>
<td><strong>BREAK - Stretch</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>&quot;It's All About Outcomes&quot;</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IDEA and File Review Activity</td>
<td></td>
</tr>
<tr>
<td>4:00-5:30 pm</td>
<td><strong>Work Session I</strong></td>
<td>Assigned</td>
</tr>
<tr>
<td>6:30-8:00 pm</td>
<td><strong>Group Dinner</strong></td>
<td>Ballroom</td>
</tr>
<tr>
<td>TIME</td>
<td>PROGRAM</td>
<td>LOCATION</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>7:00-8:00 am</td>
<td>Breakfast - fruit, breads, coffee, tea</td>
<td>Ballroom</td>
</tr>
<tr>
<td>8:00-8:20 am</td>
<td>Overview of the Day: Paula Kohler</td>
<td>See Schedule</td>
</tr>
<tr>
<td>8:30-9:30 am</td>
<td>Breakout Session One</td>
<td>See Schedule</td>
</tr>
<tr>
<td></td>
<td>Break - Coffee refresh</td>
<td></td>
</tr>
<tr>
<td>9:45-10:45 am</td>
<td>Breakout Session Two (repeat)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Break - move to assigned team rooms</td>
<td></td>
</tr>
<tr>
<td>11:00-12:30</td>
<td>Work Session II</td>
<td>Assigned</td>
</tr>
<tr>
<td>12:30-2:00 pm</td>
<td>Buffet Lunch -- Guest Speaker</td>
<td>Ballroom</td>
</tr>
<tr>
<td></td>
<td>Dr. Ed O'Leary, MPRRC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mountain Plains Regional Resource Center</td>
<td></td>
</tr>
</tbody>
</table>

Dr. Ed O’Leary is a Program Specialist for Mountain Plains Regional Resource Center and has been involved in the provision of transition services for over three decades. Dr. O’Leary’s message is both timely and universal: if young adults with disabilities are to become successful adults, they need effective advocacy and coordinated transition services to help them to achieve their dreams. This is accomplished through many avenues including appropriate transition-focused IEPs, student self-determination, coordinated interagency collaboration, mastery of academic skills, family involvement, and solid professional expertise. Dr. O’Leary will address our critical need to build capacity in our regions to enhance effective transition services and to provide students with opportunities to explore the dreams that will affect their future lives.

Break - move to assigned team rooms

2:30 - ??? | Work Session III - | Assigned |
|           | Content Experts Available until 5:00 pm     |           |
|           | Work Rooms open until 9:00 pm               |           |

???

Dinner on your own | Out and About
<table>
<thead>
<tr>
<th>TIME</th>
<th>PROGRAM</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00-8:00 am</td>
<td>Breakfast - eggs, bacon, ham, potatoes</td>
<td>Ballroom</td>
</tr>
<tr>
<td>8:00-8:15 am</td>
<td>Overview of the Day: Paula Kohler</td>
<td>Ballroom</td>
</tr>
<tr>
<td>8:15-10:15 am</td>
<td>Finalize Plan</td>
<td>Assigned Rooms</td>
</tr>
<tr>
<td></td>
<td>Prioritize goals - first thing to do by Sept. 30</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>BREAK - Coffee Refresh</strong></td>
<td></td>
</tr>
<tr>
<td>10:30-11:45 am</td>
<td>Debrief team priorities</td>
<td>Ballroom</td>
</tr>
<tr>
<td>11:45-12:15 pm</td>
<td>Wrap-up and Next Steps</td>
<td>Ballroom</td>
</tr>
<tr>
<td>12:15 pm</td>
<td>Adjourn</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Evaluations - Certificates - Reimbursements</td>
<td></td>
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<tr>
<td></td>
<td><strong>Box Lunches - eat onsite or take on the road</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Thank You -- Safe Travels !!</strong></td>
<td></td>
</tr>
</tbody>
</table>
### BREAKOUT SESSIONS

<table>
<thead>
<tr>
<th>Session</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transition Assessment – More Than Interest Inventories</strong></td>
<td>Spruce</td>
</tr>
<tr>
<td>Jon Paul Burden, CDE</td>
<td></td>
</tr>
<tr>
<td>Participants in this session will understand the components of age</td>
<td></td>
</tr>
<tr>
<td>appropriate transition assessment and will explore a variety of</td>
<td></td>
</tr>
<tr>
<td>resources.</td>
<td></td>
</tr>
<tr>
<td><strong>Developing Self-Determined Classrooms and Students</strong></td>
<td>Birch</td>
</tr>
<tr>
<td>Laura Huber-Marshall, UCCS</td>
<td></td>
</tr>
<tr>
<td>This session will present an overview of strategies to enhance student</td>
<td></td>
</tr>
<tr>
<td>self-determination and will include useful resources.</td>
<td></td>
</tr>
<tr>
<td><strong>Contextual Learning in a Standards Based World</strong></td>
<td>Lark</td>
</tr>
<tr>
<td>Diane Bassett, UNC</td>
<td></td>
</tr>
<tr>
<td>This presentation will introduce ways to blend content standards with</td>
<td></td>
</tr>
<tr>
<td>real world applications and will highlight available resources.</td>
<td></td>
</tr>
<tr>
<td><strong>Interagency Collaboration Strategies</strong></td>
<td>Pine</td>
</tr>
<tr>
<td>Cheryl Carver and Howard Fallik, DVR</td>
<td></td>
</tr>
<tr>
<td>Participants in this session will become aware of the responsibilities</td>
<td></td>
</tr>
<tr>
<td>of schools for fostering linkages with appropriate adult agencies and</td>
<td></td>
</tr>
<tr>
<td>will learn easy techniques for establishing collaborative working</td>
<td></td>
</tr>
<tr>
<td>relationships with community partners.</td>
<td></td>
</tr>
<tr>
<td><strong>Strategies for Involving Parents in the Transition Process</strong></td>
<td>Bighorn</td>
</tr>
<tr>
<td>Gina Quintana, CDE</td>
<td></td>
</tr>
<tr>
<td>This session will emphasize key considerations when involving parents</td>
<td></td>
</tr>
<tr>
<td>and families and specific strategies.</td>
<td></td>
</tr>
<tr>
<td><strong>Educational Supports in Postsecondary Settings</strong></td>
<td>Centennial</td>
</tr>
<tr>
<td>JoAnna Bennett, Front Range Community College</td>
<td></td>
</tr>
<tr>
<td>This session will clarify the differences between high school and</td>
<td></td>
</tr>
<tr>
<td>postsecondary education settings and describe supports and resources</td>
<td></td>
</tr>
<tr>
<td>available to assist students.</td>
<td></td>
</tr>
<tr>
<td><strong>Non-Traditional Supports and Services</strong></td>
<td>Denver</td>
</tr>
<tr>
<td>Beth Schaffner, PEAK Parent Center</td>
<td></td>
</tr>
<tr>
<td>So what do you do when there are long waiting lists for services?</td>
<td></td>
</tr>
<tr>
<td>This session will discuss creative options and strategies for building</td>
<td></td>
</tr>
<tr>
<td>supports.</td>
<td></td>
</tr>
<tr>
<td><strong>18-21 yr old Services - Basics and Best Practices</strong></td>
<td>Columbine</td>
</tr>
<tr>
<td>Barbara Palmer, CDE</td>
<td></td>
</tr>
<tr>
<td>This session will provide a comprehensive overview of program structures</td>
<td></td>
</tr>
<tr>
<td>and guiding principles for providing appropriate services for 18-21</td>
<td></td>
</tr>
<tr>
<td>year old students including documentation requirements for funding.</td>
<td></td>
</tr>
</tbody>
</table>
Section 5

Transition Institute Team
Planning Tools

New Mexico 2011
Oklahoma 2010
Arkansas 2008
New Mexico 2008
Oklahoma 2008
Colorado 2007
NEW MEXICO 2011 SUMMER INSTITUTE
TRANSITION STRAND

Team Planning Tool for
Student-Focused Planning Practices

June 14 - 16, 2011

Hotel Albuquerque
Albuquerque, New Mexico

Team Name: ________________________________
Team Planning Tool for Student-Focused Planning Practices

Developed by:

Paula D. Kohler, Ph.D., Professor and Co-Principal Investigator
National Secondary Transition Technical Assistance Center
Department of Special Education and Literacy Studies
Western Michigan University
3506 Sangren Hall
Kalamazoo, MI 49008
269.387.6181 or 269.387.8283

June 2009, revised June 2011

Additional resources are available at:

http://www.nsttac.org
http://www.wmich.edu/ccrc
http://homepages.wmich.edu/~kohlerp/research
  ‣ Taxonomy for Transition Programming
  ‣ Worksheet for Student-Focused Planning
  ‣ Worksheet for Student Development
  ‣ Worksheet for Interagency Collaboration
  ‣ Worksheet for Family Involvement
  ‣ Worksheet for Program Structures and Practices

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Team Information ................................................................................................................................................................................................... 8
Part 1 – Assessing Current Implementation ........................................................................................................................................................ 9
Part 2 – Identifying Strengths and Needs ........................................................................................................................................................... 13
Part 3 – Setting Goals and Planning ................................................................................................................................................................. 16
Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes ................................................................. 17
TRANSITION-FOCUSED EDUCATION

This planning tool focuses on assisting school-community teams to review and plan their strategies for implementing transition-focused education. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The Taxonomy for Transition Programming, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect broadly on your application of the student-focused planning practices in the taxonomy.
TAXONOMY FOR TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation
- Planning Strategies

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Student Development
- Life Skills Instruction
- Employment Skills Instruction
- Career and Vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

Program Structure
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery
### Taxonomy for Transition Programming

#### Student-Focused Planning

<table>
<thead>
<tr>
<th>IEP Development</th>
<th>Student Participation</th>
<th>Planning Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>· Options identified for each outcome area or goal</td>
<td>· Planning team includes student, family members, and school and participating agency personnel</td>
<td>· Self-determination facilitated within the planning process</td>
</tr>
<tr>
<td>· Post-secondary education or training goals and objectives specified</td>
<td>· Assessment information is used as basis for planning</td>
<td>· Planning decisions driven by student and family</td>
</tr>
<tr>
<td>· Occupational goals and objectives specified</td>
<td>· Transition-focused planning begins no later than age 14</td>
<td>· Planning process is student-centered</td>
</tr>
<tr>
<td>· Community-related and residential goals and objectives specified (e.g., voting)</td>
<td>· Meeting time adequate to conduct planning</td>
<td>· Student involvement in decision making</td>
</tr>
<tr>
<td>· Recreation and leisure goals and objectives specified</td>
<td>· Preparation time adequate to conduct planning</td>
<td>· Documentation of student interests and preferences</td>
</tr>
<tr>
<td>· Educational program corresponds to specific goals</td>
<td>· Planning meeting time and place conducive to student and family participation</td>
<td>· IEP education for students</td>
</tr>
<tr>
<td>· Goals are measurable</td>
<td>· Accommodations made for communication needs (e.g., interpreters)</td>
<td>· Career counseling services provided to student</td>
</tr>
<tr>
<td>· Personal needs are addressed in planning (e.g., financial, medical, guardianship)</td>
<td>· Referral to adult service provider(s) occurs prior to student’s exit from school</td>
<td>· Student self-evaluation of process</td>
</tr>
<tr>
<td>· Specific goals and objectives result from consumer choices</td>
<td>· Planning team leader identified</td>
<td></td>
</tr>
<tr>
<td>· Progress or attainment of goals is reviewed annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>· Responsibility of participants or agencies specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>· Evaluation of participant fulfillment of responsibilities</td>
<td></td>
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</tbody>
</table>
Overview of Team Planning Tool

Adapted for the New Mexico 2011 Summer Institute – Transition Strand, this planning tool focuses on assisting teams to review specific practices within the Student-Focused Planning category of the Taxonomy for Transition Programming, such as identifying and articulating students’ post-secondary goals, collecting and using transition-related assessment information, and planning and implementing educational programs that prepare students to achieve their goals. This effort is aligned with the work of the New Mexico Public Education Department to provide a variety of resources to assist districts and local schools to collect and evaluate data that provide specific information about students’ outcomes, including data regarding the transition indicators 1, 2, 13, and 14 of the Special Education State Performance Plan (SPP) and Annual Performance Report (APR). Effective for the 2011 data collection cycle and 2012 annual performance report, these indicators are described as follows:

**Indicator 1:**
Percent of youth with IEPs graduating from high school with a regular diploma compared to percent of all youth in the State graduating with a regular diploma.

(20 U.S.C. 1416 (a)(3)(A))

**Indicator 2:**
Percent of youth with IEPs dropping out of high school compared to the percent of all youth in the State dropping out of high school.

(20 U.S.C. 1416 (a)(3)(A))

**Indicator 13:**
Percent of youth with IEPs aged 16 and above with an IEP that includes appropriate measurable postsecondary goals that are annually updated and based upon an age appropriate transition assessment, transition services, including courses of study, that will reasonably enable the student to meet those postsecondary goals, and annual IEP goals related to the student’s transition services needs. There also must be evidence that the student was invited to the IEP Team meeting where transition services are to be discussed and evidence that, if appropriate, a representative of any participating agency was invited to the IEP Team meeting with the prior consent of the parent or student who has reached the age of majority.

(20 U.S.C. 1416 (a)(3)(B))

**Indicator 14:**
Percent of youth who are no longer in secondary school, had IEPs in effect at the time they left school, and were:
A. Enrolled in higher education within one year of leaving high school.
B. Enrolled in higher education or competitively employed within one year of leaving high school.
C. Enrolled in higher education or in some other postsecondary education or training program; or competitively employed or in some other employment within one year of leaving high school.

(20 U.S.C. 1416 (a)(3)(B))
This planning tool focuses specifically on assisting local teams to summarize implementation of their transition practices associated with Indicator 13, which are aligned with those in the Student-Focused Planning practices of the Taxonomy. Institute content sessions will provide information about the practices and strategies for implementation; team planning meetings will allow you to apply this information to the local context and (a) reflect on the extent to which and how you currently implement these practices, (b) determine your current strengths and needs, and (c) develop specific goals to address your needs. This planning tool is designed to help guide you through this process. Further, this tool will help you identify effectiveness of the practices, and assess the availability and integrity of the data associated with determining program effectiveness in terms of student achievement and outcomes.

Use Part 1—Current Implementation Assessment, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators for the student-focused planning practices. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection. Evaluation findings and data you have collected regarding the SPP/APR indicators will help you identify implementation levels, as well as effectiveness.

In Part 2—Needs Assessment, consider your findings from Part 1 to identify your current strengths regarding the transition practices. Also indicate areas where you find need for improvement. For example, you may determine that you have only some of your students and their parents involved in IEP development. In this case, you might determine that you need to provide professional development regarding student involvement and/or implement new curriculum or planning practices that foster student involvement.

Use Part 3—Setting Goals and Planning, to develop plans that address your needs. In developing your plans, be specific. Refer to the checklist provided to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you expect to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! Thus, one’s efforts must begin and end with the knowledge of what students are achieving after leaving high school (SPP/APR Indicator 14). The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your decisions regarding educational and transition programs and services.

**Fundamental Questions**

Regarding short-term outcomes, do your students have the skills they need to be successful?
- Academic skills?
- Independent living skills?
- Occupational skills and work behaviors?
- Self-determination skills?
- Do your students stay in school and graduate?

Regarding long-term outcomes, are your students
- Employed?
- Attending postsecondary education?
- Living independently?

Do your students have the educational and community supports and services they need to be successful?
## Team Planning Tool for Student-Focused Planning Practices

### Team Information

<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Member:</th>
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<tbody>
<tr>
<td></td>
<td>Position:</td>
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<td>Organization:</td>
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<td>Team Leader:</td>
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<td>Position:</td>
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<td>Organization:</td>
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To include all members, use additional pages if necessary.
Part 1: Assessing Current Implementation

This section of the team planning tool guides you to reflect on the extent to which you are implementing the taxonomy practices included in the Student-focused Planning category. Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in your school or district. Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

<table>
<thead>
<tr>
<th>Implementation Rating Scale</th>
<th>Evidence Rating Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK - We don’t know what or how we are doing in this area.</td>
<td>DK - We don’t know if data are available, or if so, what they indicate.</td>
</tr>
<tr>
<td>1 - This activity or practice is not occurring.</td>
<td>1 - We do not have any data regarding this practice.</td>
</tr>
<tr>
<td>2 - We are developing this activity or practice, but it is not yet occurring.</td>
<td>2 - We have very limited data regarding this practice OR the quality of the data we have is not very good.</td>
</tr>
<tr>
<td>3 - This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
<td>3 - We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
</tr>
<tr>
<td>4 - This activity or practice occurs regularly, widely, and consistently.</td>
<td>4 - We have high quality data that indicate implementation and/or effectiveness.</td>
</tr>
</tbody>
</table>

Example: Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living</td>
<td>DK 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:** Review of IEPs in our school indicated that 30% of students’ IEPs include measurable post-school goals. So – we have limited implementation, but *good quality data* showing where we need to improve. However, our IEP forms were somewhat difficult to evaluate, because people were not consistent about where they put the information. Need to improve content of IEPs, quality of IEP planning; new form would help.
## Student-Focused Planning Practices

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<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent of Evidence</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>4. Age-appropriate transition assessment information is collected and (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
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<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
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</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions

- To what extent do students and their parents actively participate in the development of their individual education program (IEP)? What strategies are used to foster student and parent participation? How are students prepared to participate?
- How is information regarding students’ interests, preferences, and needs used to identify postsecondary goals?
- What transition-related assessment information is collected (i.e., academic, career/occupational, and/or adaptive behavior information)? When is it collected? By whom? How is it collected?
- To what extent and how is transition-related assessment information (i.e., academic, cognitive, occupational, and/or adaptive behavior assessment information) used in developing annual goals and objectives and to determine related service needs?
- To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student’s educational program?
- To what extent do students’ educational programs include goals and objectives identified by the student?
- To what extent are the goals and objectives identified in students’ educational programs (including “transition services”) implemented and evaluated?
- What strategies are used to insure that agency personnel (with parent/guardian permission) and other appropriate individuals actively participate in planning meetings?
- To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered?

#### Suggested Indicators

- # students whose present level of academic achievement and functional performance (PLAAFP) regarding transition goals and services are based on transition-related assessments
- # students with measurable post-school goals
- # IEP goals that are student-initiated
- # students with goal-related annual objectives and transition services
- # students attending their IEP meeting; level of student participation
- # students whose course of study aligns with post-school goals

#### Notes and/or Ideas
Part 2: Identifying Strengths and Needs

Use the information from Part 1—Assessing Current Implementation to summarize the current strengths of your transition-focused education and services. Building on the information regarding your strengths, identify specific transition education or service needs.

You may find that your needs include a range of activities. In some cases, you may determine that you need to change practice in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a policy change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a form can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

To help develop plans that address your needs, use the space provided to code your identified needs with respect to their priority and/or immediacy (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

<table>
<thead>
<tr>
<th>Priority:</th>
<th>Immediacy:</th>
</tr>
</thead>
<tbody>
<tr>
<td>› High</td>
<td>› Immediate</td>
</tr>
<tr>
<td>› Medium</td>
<td>› Intermediate</td>
</tr>
</tbody>
</table>

Example: Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>STUDENT-FOCUSED PLANNING PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY/IMMEDIACY</th>
</tr>
</thead>
</table>
| 6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting. | › IEP review indicated about 75% of students attended their IEP meeting  
› Site review indicates some teachers integrating IEP planning and involvement strategies in their curricula | › Evaluations of the IEP meetings indicated many students were only passively involved in identifying their interests and preferences  
› Greater implementation of evidence-based strategies to support student involvement is needed | High Immediate |
### Student-Focused Planning Practices

<table>
<thead>
<tr>
<th><strong>STUDENT-FOCUSED PLANNING PRACTICES</strong></th>
<th><strong>CURRENT STRENGTHS</strong></th>
<th><strong>NEEDS</strong></th>
<th><strong>PRIORITY/IMMEDIACY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
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</tbody>
</table>
### Current Strengths

1. Age-appropriate transition assessment information is collected and (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.

2. Students, families, educators, and relevant service providers (with parent/guardian permission) work together to plan and provide instruction and services.

3. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the next page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Example

<table>
<thead>
<tr>
<th>Student-Focused Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Our focus for student-focused planning is on:</strong></td>
</tr>
<tr>
<td><strong>Our goal for student-focused planning is:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
<th>TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>› Identify additional transition-related assessments</td>
<td>› Scott and Emily</td>
<td>› By Oct. 15</td>
</tr>
<tr>
<td>› Establish assessment schedule/context</td>
<td>› Transition council</td>
<td>› By Dec. 15</td>
</tr>
<tr>
<td>› Implement at least 1 assessment with current 11th graders</td>
<td>› Scott oversee, with teachers</td>
<td>› By March 15</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>› List of assessments</td>
<td>› Increased student, teacher, family, service provider knowledge of students’ transition-related skills and/or behaviors</td>
<td>› Student scores</td>
<td>› Assessment profile, report</td>
</tr>
<tr>
<td>› Assessment schedule</td>
<td>› Increased # of student IEPs with PLAAFP regarding transition goals</td>
<td>› # students assessed</td>
<td>› IEP documents</td>
</tr>
<tr>
<td>› Assessment report for each student</td>
<td></td>
<td>› # IEPs with assessment info</td>
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</table>

**Additional stakeholders and/or TA needs:** Need professional development from district on using transition assessment info as basis for post-secondary and annual goals.
<table>
<thead>
<tr>
<th>FOCUS AREA</th>
<th>CONSIDERATIONS AND CRITERIA</th>
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<tbody>
<tr>
<td>Goals</td>
<td>• Be specific.</td>
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<td>• Identify what you are trying to accomplish.</td>
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<td>• Think in terms of outcomes rather than process or products.</td>
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<td>• Is the goal achievable within the specified timeframe?</td>
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<tr>
<td>Activities</td>
<td>• Is the activity action-oriented?</td>
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<td>• Will the activity move you toward your goal?</td>
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<tr>
<td>Outputs</td>
<td>• Think in terms of “product” – something that will be produced?</td>
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<tr>
<td>Expected Outcomes</td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
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<td></td>
<td>• Is the expected outcome an important aspect of your goal(s)?</td>
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<tr>
<td>Outcome Indicators</td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?)</td>
</tr>
<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
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<td></td>
<td>• Is the indicator specific?</td>
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<tr>
<td>Outcome Data Collection</td>
<td>• Are information sources identified?</td>
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<td>• Available from existing sources?</td>
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<td></td>
<td>• New sources must be developed?</td>
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<td></td>
<td>• What methods will you use to collect information?</td>
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<td></td>
<td>• Must information be collected about all students?</td>
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<td></td>
<td>• Can sampling methods be used?</td>
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</table>
### Student-Focused Planning Practices

Our focus for student-focused planning is on:

Our goal for student-focused planning is:

<table>
<thead>
<tr>
<th>Specific Goal-Related Activities</th>
<th>Person Responsible</th>
<th>Timeframe</th>
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<th>Outputs/Products</th>
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<th>Potential Indicators</th>
<th>Data Sources</th>
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Additional stakeholders and/or TA needs:
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Additional stakeholders and/or TA needs:
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<th>Person Responsible</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outputs/Products</th>
<th>Expected Outcomes</th>
<th>Potential Indicators</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional stakeholders and/or TA needs:
Section A: Overview and Examples

Team Planning Tool for Student-Focused Planning and Student Development Practices

2010 Oklahoma Transition Institute
September 14 - 16, 2010
Norman, OK
2010 Oklahoma Transition Institute Team Planning Tool

Developed by:

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June 2008, modified June 2009 and August 2010

Additional resources are available at:

http://www.nsttac.org
http://www.wmich.edu/ccrc
http://homepages.wmich.edu/~kohlerp/research
  ‣ Taxonomy for Transition Programming
  ‣ Worksheet for Student-Focused Planning
  ‣ Worksheet for Student Development
  ‣ Worksheet for Interagency Collaboration
  ‣ Worksheet for Family Involvement
  ‣ Worksheet for Program Structures and Practices

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**Transition-Focused Education**

This planning tool focuses on assisting school-community teams to review and plan their strategies for implementing *transition-focused education*. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The Taxonomy for Transition Programming, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect on your application of specific student-focused planning practices and student development practices — two categories of practices in the taxonomy.
TAXONOMY FOR TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation
- Planning Strategies

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Student Development
- Life Skills Instruction
- Employment Skills Instruction
- Career and Vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

Program Structures
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery
**STUDENT-FOCUSED PLANNING**

<table>
<thead>
<tr>
<th><strong>IEP Development</strong></th>
<th><strong>Student Participation</strong></th>
<th><strong>Planning Strategies</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Options identified for each outcome area or goal</td>
<td>Planning team includes student, family members, and school and participating agency personnel</td>
<td>Self-determination facilitated within the planning process</td>
</tr>
<tr>
<td>Post-secondary education or training goals and objectives specified in the IEP</td>
<td>Assessment information is used as basis for planning</td>
<td>Planning decisions driven by student and family</td>
</tr>
<tr>
<td>Occupational goals and objectives specified</td>
<td>Transition-focused planning begins no later than age 14</td>
<td>Planning process is student-centered</td>
</tr>
<tr>
<td>Community-related and residential goals and objectives specified (e.g., voting)</td>
<td>Meeting time adequate to conduct planning</td>
<td>Student involvement in decision making</td>
</tr>
<tr>
<td>Recreation and leisure goals and objectives specified</td>
<td>Preparation time adequate to conduct planning</td>
<td>Documentation of student interests and preferences</td>
</tr>
<tr>
<td>Educational program corresponds to specific goals</td>
<td>Planning meeting time and place conducive to student and family participation</td>
<td>IEP education for students</td>
</tr>
<tr>
<td>Goals are measurable</td>
<td>Accommodations made for communication needs (e.g., interpreters)</td>
<td>Career counseling services provided to student</td>
</tr>
<tr>
<td>Personal needs are addressed in planning (e.g., financial, medical, guardianship)</td>
<td>Referral to adult service provider(s) occurs prior to student’s exit from school</td>
<td>Student self-evaluation of process</td>
</tr>
<tr>
<td>Specific goals and objectives result from consumer choices</td>
<td>Planning team leader identified</td>
<td></td>
</tr>
<tr>
<td>Progress or attainment of goals is reviewed annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responsibility of participants or agencies specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation of participant fulfillment of responsibilities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## TAXONOMY FOR TRANSITION PROGRAMMING

### STUDENT DEVELOPMENT

<table>
<thead>
<tr>
<th><strong>Life Skills Instruction</strong></th>
<th><strong>Employment Skills Instruction</strong></th>
<th><strong>Career and Vocational Curricula</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Leisure skills training</td>
<td>• Work-related behaviors and skills training</td>
<td></td>
</tr>
<tr>
<td>• Social skills training</td>
<td>• Job seeking skills training</td>
<td>• Career education curriculum</td>
</tr>
<tr>
<td>• Self-determination skills training, including goal setting, decision making, and self-advocacy</td>
<td>• Occupation-specific vocational skill training</td>
<td></td>
</tr>
<tr>
<td>• Independent living skills training</td>
<td></td>
<td>• Tech prep curriculum</td>
</tr>
<tr>
<td>• Learning strategies skills training</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Support Services

<table>
<thead>
<tr>
<th><strong>Assessment</strong></th>
<th><strong>Structured Work Experience</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Career assessments (including curriculum-based and situational assessment)</td>
<td>• Apprenticeships</td>
</tr>
<tr>
<td>• Academic, cognitive, and adaptive behavior assessments</td>
<td>• Paid work experience</td>
</tr>
</tbody>
</table>

### Employment Skills Instruction

- Work-related behaviors and skills training
- Job seeking skills training
- Occupation-specific vocational skill training

### Career and Vocational Curricula

- Career education curriculum
- Tech prep curriculum

### Support Services

- Identification and development of environmental adaptations
- Identification and development of accommodations
- Identification and development of natural supports
- Provision of related services (e.g., OT, PT, speech therapy, transportation)
- Mentoring

### Structured Work Experience

- Apprenticeships
- Paid work experience
- Work study program
- Job placement services (prior to school exit)
Overview of Team Planning Tool

Adapted for the 2010 Oklahoma Transition Institute, this planning tool focuses on assisting teams to review specific practices within the Student-Focused Planning and Student Development categories of the Taxonomy for Transition Programming, such as collecting and using transition-related assessment information; planning and implementing educational programs, such as work experience, that prepare students to achieve their goals. This effort is aligned with the work of the Oklahoma State Department of Education to provide a variety of resources to assist districts and local schools to collect and evaluate data that provide specific information about students’ outcomes, including data regarding transition indicators 1, 2, 13, and 14 of the Special Education State Performance Plan (SPP) and Annual Performance Report (APR). These indicators are described as follows:

**Indicator 1:**
Percent of youth with IEPs graduating from high school with a regular diploma compared to percent of all youth in the State graduating with a regular diploma.

(20 U.S.C. 1416 (a)(3)(A))

**Indicator 2:**
Percent of youth with IEPs dropping out of high school compared to the percent of all youth in the State dropping out of high school.

(20 U.S.C. 1416 (a)(3)(A))

**Indicator 13:**
Percent of youth with IEPs aged 16 and above with an IEP that includes appropriate measurable postsecondary goals that are annually updated and based upon an age appropriate transition assessment, transition services, including courses of study, that will reasonably enable the student to meet those postsecondary goals, and annual IEP goals related to the student’s transition services needs. There also must be evidence that the student was invited to the IEP Team meeting where transition services are to be discussed and evidence that, if appropriate, a representative of any participating agency was invited to the IEP Team meeting with the prior consent of the parent or student who has reached the age of majority.

(20 U.S.C. 1416 (a)(3)(B))

**Indicator 14:**
Percent of youth who are no longer in secondary school, had IEPs in effect at the time they left school, and were:
A. Enrolled in higher education within one year of leaving high school.
B. Enrolled in higher education or competitively employed within one year of leaving high school.
C. Enrolled in higher education or in some other postsecondary education or training program; or competitively employed or in some other employment within one year of leaving high school.

(20 U.S.C. 1416 (a)(3)(B))
Part 1: Assessing Current Implementation

This part of the team planning tool guides you to reflect on the extent to which you are implementing specific taxonomy practices included in the Student-Focused Planning and Student Development categories. Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in your school or district. Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

<table>
<thead>
<tr>
<th>Implementation Rating Scale</th>
<th>Evidence Rating Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK  - We don't know what or how we are doing in this area.</td>
<td>DK  - We don’t know if data are available, or if so, what they indicate.</td>
</tr>
<tr>
<td>1  - This activity or practice is not occurring.</td>
<td>1  - We do not have any data regarding this practice.</td>
</tr>
<tr>
<td>2  - We are developing this activity or practice, but it is not yet occurring.</td>
<td>2  - We have very limited data regarding this practice OR the quality of the data we have is not very good.</td>
</tr>
<tr>
<td>3  - This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
<td>3  - We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
</tr>
<tr>
<td>4  - This activity or practice occurs regularly, widely, and consistently.</td>
<td>4  - We have high quality data that indicate implementation and/or effectiveness.</td>
</tr>
</tbody>
</table>

Example: From Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <strong>measurable post-school goals</strong> in (a) education and/or training, (b) employment, and (c) independent living</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:** Review of IEPs in our school indicated that 30% of students’ IEPs include measurable post-school goals. So – we have limited implementation, but good quality data showing where we need to improve. However, our IEP forms were somewhat difficult to evaluate, because people were not consistent about where they put the information. Need to improve content of IEPs, quality of IEP planning; new form would help.
Student Focused Planning Practices

**Reflective Questions**

- To what extent do students and their parents actively participate in the development of their individual education program (IEP)? What strategies are used to foster student and parent participation? How are students prepared to participate?
- How is information regarding students’ interests, preferences, and needs used to identify postsecondary goals?
- To what extent and how is transition-related assessment information (i.e., academic, cognitive, occupational, and/or adaptive behavior assessment information) used in developing annual goals and objectives and to determine related service needs?
- To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student’s educational program?
- To what extent do students’ educational programs include goals and objectives identified by the student?
- To what extent are the goals and objectives identified in students’ educational programs (including “transition services”) implemented and evaluated?
- What strategies are used to insure that agency personnel (with parent/guardian permission) and other appropriate individuals actively participate in planning meetings?
- To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered?
- What procedures are used to address discrepancies between services promised and services provided?

**Suggested Indicators**

- # students whose present level of academic achievement and functional performance (PLAAFP) regarding transition goals and services are based on transition-related assessments
- # students with measurable post-school goals
- # IEP goals that are student-initiated
- # students with goal-related annual objectives and transition services
- # students attending their IEP meeting; level of student participation
- # students whose course of study aligns with post-school goals

**Notes and/or Ideas**
### Reflective Questions

- What transition-related assessment information is collected (i.e., academic, career/occupational, and/or adaptive behavior information)?
  - When is it collected? By whom? How is it collected?
- How are target skills determined and subsequently evaluated? What do these assessments indicate regarding student learning/achievement of target skills?
- Do students’ educational programs align with their post-school goals?
- To what extent do all students participate in work-based education, including paid and/or unpaid work experiences, during high school?
- In which occupational areas are students employed during their work experiences?
- Are students’ work experiences aligned with their post-school goals?
- Are students’ work experiences aligned with their course of study?
- How are students informed of and recruited for co-curricula and extra-curricular activities?
- Do students have the skills they need to be successful, including: Academic skills? Independent living skills? Occupational skills? Employability and work behaviors? Self-determination skills?
- To what extent do students have the supports, accommodations, and/or related services they need to access work experiences?
- How are student accommodation needs identified?
- What methods are used to help students generalize their accommodation needs from school to community environments?

### Suggested Indicators

- # and % of students receiving services in specific settings
- Cognitive, academic, occupational, and adaptive behavior assessments used; student performance on assessments
- Specific strategies for student recruitment to co- and extracurricular activities
- # students participating in work-based, co-curricular, and extracurricular activities
- # and % of accommodation needs met and unmet
- % mastery of target skills

### Notes and/or Ideas:
Part 2: Identifying Strengths and Needs
Student-Focused Planning Practices and Student Development Practices

Use the information from Part 1—Assessing Current Implementation to summarize the current strengths of your transition-focused education and services. Building on the information regarding your strengths, identify specific transition education or service needs.

You may find that your needs include a range of activities. In some cases, you may determine that you need to change practice in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a policy change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a form can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

To help develop plans that address your needs, use the space provided to indicate the kind of action required to address each need you identify (practice, policy, or form) and then code your identified needs with respect to their priority and/or immediacy (e.g., high priority/Immediate need, moderate priority/intermediate need, or lower priority/long-term need).

Kinds of Actions:
- Practice
- Policy
- Form
- Other

Priority:
- High
- Low

Immediacy:
- Immediate
- Medium
- Long-term

Example: From Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>KIND OF ACTION</th>
<th>PRIORITY/ IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Students are prepared to participate and do participate meaningfully</td>
<td>‣ IEP review indicated about 75% of students attended their IEP meeting</td>
<td>‣ Evaluations of the IEP meetings indicated many students were only</td>
<td>Practice</td>
<td>High Immediate</td>
</tr>
<tr>
<td>in development of their IEP and in their IEP meeting.</td>
<td>‣ Site review indicates some teachers integrating IEP planning and involvement</td>
<td>passively involved in identifying their interests and preferences</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>strategies in their curricula</td>
<td>‣ Greater implementation of evidence-based strategies to support</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>student involvement is needed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the last page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Example:

<table>
<thead>
<tr>
<th>STUDENT DEVELOPMENT PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOCUS: Employment and occupational skills development, including paid work experience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GOAL: Increase # of students participating in work experience and/or work-based training</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPECIFIC GOAL-RELATED ACTIVITIES</td>
</tr>
<tr>
<td>1. Identify possible community liaisons to develop training sites</td>
</tr>
<tr>
<td>2. Establish expected outcomes and expectations for students and community liaisons</td>
</tr>
<tr>
<td>3. Complete task analysis of work tasks for skill training in classrooms</td>
</tr>
<tr>
<td>4. Conduct student tours of potential training sites and “new employee orientation”</td>
</tr>
<tr>
<td>5. Identify key contacts (employers, job coaches, teachers)</td>
</tr>
<tr>
<td>6. Assess skills to determine readiness for sites</td>
</tr>
<tr>
<td>7. Place students at training sites</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task analyses for various job skills</td>
<td>Increased student participation in work experiences</td>
<td># of students participating in work experiences</td>
<td>Teacher records</td>
</tr>
<tr>
<td>Creation guide (how to create training sites)</td>
<td>Increased student employment</td>
<td># of students employed after training</td>
<td>Job coach evaluations/records</td>
</tr>
<tr>
<td></td>
<td>Increased life skills (budgeting)</td>
<td># of students opening banking accounts, purchasing</td>
<td>Community member surveys</td>
</tr>
</tbody>
</table>
# Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Considerations and Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>‣ Be specific.</td>
</tr>
<tr>
<td></td>
<td>‣ Identify what you are trying to accomplish.</td>
</tr>
<tr>
<td></td>
<td>‣ Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>‣ Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the goal measurable?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the goal within the scope of your control?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the goal action-oriented?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the goal realistic?</td>
</tr>
<tr>
<td>Activities</td>
<td>‣ Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>‣ Will the activity move you toward your goal?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the activity theoretically-based?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the activity do-able with available resources?</td>
</tr>
<tr>
<td>Outputs</td>
<td>‣ Think in terms of “product” — something that will be produced?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the “product” producible with the available resources?</td>
</tr>
<tr>
<td></td>
<td>‣ Will the outputs move you toward your goal?</td>
</tr>
<tr>
<td>Expected Outcomes</td>
<td>‣ Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the expected outcome an important aspect of your goal(s)?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the expected outcome specific?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the expected outcome meaningful?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the expected outcome measurable?</td>
</tr>
<tr>
<td>Outcome Indicators</td>
<td>‣ Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?)</td>
</tr>
<tr>
<td></td>
<td>‣ What information do you need to answer the important evaluation question(s)?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the indicator specific?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the indicator measurable?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the indicator meaningful?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the indicator short or long-term (need both)?</td>
</tr>
<tr>
<td></td>
<td>‣ Is the indicator possible with available resources?</td>
</tr>
<tr>
<td>Outcome Data Collection</td>
<td>‣ Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>‣ Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>‣ New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>‣ What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>‣ Must information be collected about all students?</td>
</tr>
<tr>
<td></td>
<td>‣ Can sampling methods be used?</td>
</tr>
<tr>
<td></td>
<td>‣ Who will collect the information?</td>
</tr>
<tr>
<td></td>
<td>‣ Do arrangements need to be made for data collection?</td>
</tr>
<tr>
<td></td>
<td>‣ Do data collection instruments need to be developed?</td>
</tr>
</tbody>
</table>
Section B: Planning Template

Team Planning Tool for Student-Focused Planning Practices and Student Development Practices

2010 Oklahoma Transition Institute

September 14 - 16, 2010
Norman, OK
<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Leader:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Position:</td>
</tr>
<tr>
<td></td>
<td>Organization:</td>
</tr>
<tr>
<td></td>
<td>Best Address:</td>
</tr>
<tr>
<td></td>
<td>Best Phone:</td>
</tr>
<tr>
<td></td>
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<td>1. Students' IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals. (from Student-Focused Planning practices)</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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**Related Breakout Sessions:**
- Developing Transition Activities: Students and Families (LeFrancois and Oliver)
- Summary of Performance and Self-Directed Transition Planning (Sylvestre)
- A Framework for Supporting Individuals with Autism (Daman and Smith)
- Teaching Transition Education Skills in an Inclusive High School Classroom (Sears and Farley)
- What Students Need to be Taught Before They Graduate (North)

**Description:**

2. Students, families, educators, and relevant service providers work together to plan and provide instruction and services. (from Student-Focused Planning practices)

**Related Breakout Sessions:**
- Parent Involvement and Self-Advocacy in Transition (Burzio)
- Student Involvement in the IEP and Transition Planning Process (Martin)
- Involving Parents of Elementary Students in the Transition Planning Process (Hilborn)
- Understanding DRS and Services (Osborn and Lucas)
- Community Resources for an Effective Transition (Bruce and Garner)

**Description:**
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<td>· Summary of Performance and Self-Directed Transition Planning (Sylvester)</td>
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<tr>
<td>· Outside the Box: Community Based Work Experiences after High School (Blose and Smith)</td>
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<td>4. Life skills development, including self-determination skills (from Student Development practices)</td>
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<td>· Creating Transition Electives (Heller and Teague)</td>
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<td>· Empowerment, Independence, and Equal Access: Students with Disabilities in Postsecondary Education (Cheng)</td>
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<tr>
<td>· Lessons Learned: Beginning a Transition Program (Parker and Cook)</td>
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<td>· Person-Centered Thinking (Long and Randle)</td>
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<td>· Tools for Developing Self-Determined Students (Cantley, McConnell, and Little)</td>
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<td>· Teaching Transition Education Skills in an Inclusive High School Classroom (Sears and Farley)</td>
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<td>· Transition in Mid-Del Schools (Winkler, Wilson, and Hurt)</td>
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<td>· What Students Need to be Taught Before They Graduate (North)</td>
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<td>5. Employment and occupational skills development, including paid work experience (from Student Development practices)</td>
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**Related Breakout Sessions:**
- Creating Transition Electives (Heller and Teague)
- Transition Made Easy…(ier): Computer Applications & Entrepreneurial Projects via Tech Now (DeRennaux)
- How to Prepare 9th and 10th Grade Students for Career Tech (Eason)
- Lessons Learned: Beginning a Transition Program (Parker and Cook)
- Transition in Mid-Del Schools (Winkle, Wilson and Hurt)
- What Students Need to be Taught Before They Graduate (North)

**Description:**

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<td>6. Identification and provision of support services that foster students’ skill development and achievement of post-school goals (e.g., environmental adaptations; accommodations; related services such as AT, OT; etc.) (from Student Development practices)</td>
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**Related Breakout Sessions:**
- Empowerment, Independence, and Equal Access: Students with Disabilities in Postsecondary Education (Cheng)
- Understanding DRS and Services (Osborn and Lucas)
- Community Resources for an Effective Transition (Bruce and Garner)
- NIMAS: Providing Accessible Materials for Students with Print Disabilities (Jaco and Stinnett)

**Description:**
## Part 2: Identifying Strengths and Needs

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# Part 3: Setting Goals and Planning

## Student-Focused Planning Practices and Student Development Practices

### STUDENT-FOCUSED PLANNING PRACTICES

**Focus:**

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**Goal:**

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<th>Expected Outcomes</th>
<th>Potential Indicators</th>
<th>Data Sources</th>
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**Additional stakeholders and/or TA needs:**

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Oklahoma Team Planning Tool • Part 3—Setting Goals and Planning  
September 2010 • 8
# Student-Focused Planning Practices

**Focus:**

**Goal:**

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Additional stakeholders and/or TA needs:
## STUDENT DEVELOPMENT PRACTICES

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**Additional stakeholders and/or TA needs:**
Team Planning Tool for Student - Focused Planning and Interagency Collaboration

2008 Arkansas Transition Summit

February 6 – 7, 2008
Hot Springs, AR
Team Planning Tool for Student-Focused Planning and Interagency Collaboration

Developed by:

Paula D. Kohler, Ph.D., Professor and Co-Principal Investigator
National Secondary Transition Technical Assistance Center
Department of Special Education and Literacy Studies
Western Michigan University
3506 Sangren Hall
Kalamazoo, MI 49008
269.387.6181

November 2007

Additional resources are available at:

http://www.nsttac.org
http://www.wmich.edu/ccrc
http://homepages.wmich.edu/~kohlerp/research

◆ Taxonomy for Transition Programming
◆ Worksheet for Student-Focused Planning
◆ Worksheet for Student Development
◆ Worksheet for Interagency Collaboration
◆ Worksheet for Family Involvement
◆ Worksheet for Program Structures and Practices

Bibliography


# 2008 Arkansas Transition Summit

**Team Planning Tool for Student-Focused Planning and Interagency Collaboration**

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<td>Team Planning Tool Overview</td>
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<td>Part 1 – Assessing Current Implementation</td>
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<tr>
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<tr>
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Team Planning Tool for Student-Focused Planning and Interagency Collaboration

Team Name: ___________________________________________
Primary Contact: _______________________________________
Position: ____________________________
Organization: ____________________________
Address: ____________________________________________
Phone: __________________ Fax: __________
E mail: ____________________________________________

Team Member: _________________________________________
Position: ____________________________
Organization: ____________________________
Address: ____________________________________________
Phone: __________________ Fax: __________
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Team Member: _________________________________________
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Team Member: _________________________________________
Position: ____________________________
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Phone: __________________ Fax: __________
E mail: ____________________________________________

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**TRANSITION-FOCUSED EDUCATION**

This planning tool focuses on assisting school-community teams to review and plan their strategies for implementing *transition-focused education*. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The *Taxonomy for Transition Programming*, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect broadly on your application of *student-focused planning and interagency collaboration* practices—two categories of practices in the taxonomy.
TAXONOMY FOR TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation

Life Skills Instruction
Employment Skills Instruction
Career and Vocational Curricula
Structured Work Experience
Assessment
Support Services

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Program Structure
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery

Student Development
STUDENT-FOCUSED PLANNING

<table>
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<th>IEP Development</th>
<th>Student Participation</th>
<th>Planning Strategies</th>
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<tbody>
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<td>Options identified for each outcome area or goal</td>
<td>Planning team includes student, family members, and school and participating agency personnel</td>
<td>Self-determination facilitated within the planning process</td>
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<tr>
<td>Post-secondary education or training goals and objectives specified in the IEP</td>
<td>Assessment information is used as basis for planning</td>
<td>Planning decisions driven by student and family</td>
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<tr>
<td>Occupational goals and objectives specified</td>
<td>Transition-focused planning begins no later than age 14</td>
<td>Planning process is student-centered</td>
</tr>
<tr>
<td>Community-related and residential goals and objectives specified (e.g., voting)</td>
<td>Meeting time adequate to conduct planning</td>
<td>Student involvement in decision making</td>
</tr>
<tr>
<td>Recreation and leisure goals and objectives specified</td>
<td>Preparation time adequate to conduct planning</td>
<td>Documentation of student interests and preferences</td>
</tr>
<tr>
<td>Educational program corresponds to specific goals</td>
<td>Planning meeting time and place conducive to student and family participation</td>
<td>IEP education for students</td>
</tr>
<tr>
<td>Goals are measurable</td>
<td>Accommodations made for communication needs (e.g., interpreters)</td>
<td>Career counseling services provided to student</td>
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<tr>
<td>Personal needs are addressed in planning (e.g., financial, medical, guardianship)</td>
<td>Referral to adult service provider(s) occurs prior to student’s exit from school</td>
<td>Student self-evaluation of process</td>
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<tr>
<td>Specific goals and objectives result from consumer choices</td>
<td>Planning team leader identified</td>
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<td>Progress or attainment of goals is reviewed annually</td>
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<tr>
<td>Responsibility of participants or agencies specified</td>
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<td>Evaluation of participant fulfillment of responsibilities</td>
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Team Planning Tool for Student-Focused Planning and Interagency Collaboration
### Taxonomy for Transition Programming

#### Interagency Collaboration

**Collaborative Service Delivery**
- Coordinated requests for information (e.g., to parents, employers)
- Reduction of system barriers to collaboration
- Collaborative funding and staffing of transition services
- Collaborative development and use of assessment data
- Coordinated and shared delivery of transition-related services
- Systems information disseminated among cooperating agencies
- Collaborative program planning and development, including employer involvement
- Collaborative consultation between special, “regular,” and vocational educators
- Collaboration between post-secondary education institutions and the school district

**Collaborative Framework**
- Interagency coordinating body that includes consumers, parents, service providers, and employers
- Formal interagency agreement
- Roles of service providers clearly articulated
- Established methods of communication among service providers
- Student information shared among agencies via established procedures (with appropriate release of information and confidentiality)
- Single-case management system
- “Lead” agency identified
- Designated transition contact person for all service providers
TEAM PLANNING TOOL OVERVIEW

Adapted for the 2008 Arkansas Transition Summit, this planning tool focuses on assisting teams to review specific practices within the Student-Focused Planning and Interagency Collaboration categories of the Taxonomy for Transition Programming, such as identifying and articulating students’ post-secondary goals, collecting and using transition-related assessment information, and creating collaborative interagency agreements that prepare students to achieve their goals. Team planning sessions during the transition summit will focus on three primary activities – reflecting on the extent to which and how you currently implement these practices, determining your current strengths and needs, and developing specific goals to address your needs. This planning tool is designed to help guide you through this process.

Use Part 1—Assessing Current Implementation, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators that focus on each general area. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection.

In Part 2—Identifying Strengths and Needs, synthesize your findings from Part 1 to identify your strengths and needs that emerged during your discussions.

Use Part 3—Setting Goals and Planning to develop plans that address your needs. In developing your plans, be specific. Refer to the checklist on the last page of this tool to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you expect to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! Thus, one’s efforts must begin and end with the knowledge of what students are achieving after leaving high school (SPP indicator 14). The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your decisions regarding educational and transition programs and services.

Fundamental Questions

› Regarding short-term outcomes, do your students have the skills they need to be successful?
  • Academic skills?
  • Independent living skills?
  • Social skills?
  • Occupational skills?
  • Work behaviors?
  • Self-determination skills?

› Regarding long-term outcomes, are your students
  • Employed?
  • Attending postsecondary education?
  • Living independently?
  • Participating in their communities?

› Do your students have the educational and community supports and services they need to be successful?
Part 1: Assessing Current Implementation

This section of the team planning tool guides you to reflect on the extent to which you are implementing the taxonomy practices included in: (A) Student-Focused Planning and (B) Interagency Collaboration. Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in your school or district. Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

<table>
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<th>Implementation Rating Scale</th>
<th>Evidence Rating Scale</th>
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<tr>
<td>DK - We don't know what or how we are doing in this area.</td>
<td>DK - We don’t know if data are available, or if so, what they indicate.</td>
</tr>
<tr>
<td>1 - This activity or practice is not occurring.</td>
<td>1 - We do not have any data regarding this practice.</td>
</tr>
<tr>
<td>2 - We are developing this activity or practice, but it is not yet occurring.</td>
<td>2 - We have very limited data regarding this practice OR the quality of the data we have is not very good.</td>
</tr>
<tr>
<td>3 - This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
<td>3 - We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
</tr>
<tr>
<td>4 - This activity or practice occurs regularly, widely, and consistently.</td>
<td>4 - We have high quality data that indicate implementation and/or effectiveness.</td>
</tr>
</tbody>
</table>

Example: Part A – Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students’ IEPs include <strong>measurable post-school goals</strong> in (a) education and/or training, (b) employment, and (c) independent living</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:** Review of IEPs in our school indicated that 30% of students’ IEPs include measurable post-school goals. So – we have **limited** implementation, but **good quality data** showing where we need to improve. However, our IEP forms were somewhat difficult to evaluate, because people were not consistent about where they put the information. Need to improve content of IEPs, quality of IEP planning; new form would help.
## A. Student-Focused Planning Practices

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</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
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</tr>
<tr>
<td>Description:</td>
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<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
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<td></td>
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</tbody>
</table>
### Practices

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<tr>
<td>4. Age-appropriate transition assessment information is (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.</td>
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<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:**

5. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.

**Description:**

6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.

**Description:**
## Reflective Questions and Indicators

### Reflective Questions

- To what extent do students and their parents actively participate in the development of their individual education program (IEP)? What strategies are used to foster student and parent participation? How are students prepared to participate?
- How is information regarding students’ interests, preferences, and needs used to identify postsecondary goals?
- To what extent and how is transition-related assessment information (i.e., academic, cognitive, occupational, and/or adaptive behavior assessment information) used in developing annual goals and objectives and to determine related service needs?
- To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student’s educational program?
- To what extent do students’ educational programs include goals and objectives identified by the student?
- To what extent are the goals and objectives identified in students’ educational programs (including “transition services”) implemented and evaluated?
- What strategies are used to insure that agency personnel (with parent/guardian permission) and other appropriate individuals actively participate in planning meetings?
- To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered?
- What procedures are used to address discrepancies between services promised and services provided?

### Suggested Indicators

- # students whose present level of academic achievement and functional performance (PLAAFP) regarding transition goals and services are based on transition-related assessments
- # students with measurable post-school goals
- # IEP goals that are student-initiated
- # students with goal-related annual objectives and transition services
- # students attending their IEP meeting; level of student participation
- # students whose course of study aligns with post-school goals

### Notes and/or Ideas
### B. Interagency Collaboration Practices

<table>
<thead>
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<th>Practices</th>
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<tr>
<td>1. Formal collaborative agreements and structures are established among</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>schools, employers, employment-related agencies, and post-secondary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>institutes. These agreements clearly articulate the roles and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>responsibilities to assure the following occur in culturally</td>
<td></td>
<td></td>
</tr>
<tr>
<td>appropriate ways:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Methods of communication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Information sharing protocols</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Referral protocols</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Service and task responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Funding responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Points of contact</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description:**
<table>
<thead>
<tr>
<th>Practices</th>
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<td>Description:</td>
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<td></td>
</tr>
</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions
- How many schools have up-to-date collaborative agreements with their local service agencies, employment agencies, youth development programs, etc.?
- What agencies and/or organizations are included in the agreements?
- Are formal meetings held? How often?
- Is information available and disseminated regarding agency services, eligibility requirements, and referral protocols?
- How and to what extent do various educators and service agencies coordinate, collect, and share assessment information?
- To what extent do rehabilitation counselors, and/or other relevant service providers actively participate in IEP development and/or meetings?
- How are parents and students informed about the differences between secondary IDEA services and post-secondary and/or adult services under 504 and ADA?
- How are businesses and labor unions involved in identifying standards, developing curricula, participating in career awareness and exploration, providing work-based education, and providing professional development for teachers?
- How are community-level transition service needs identified?
- What services do students need but do not get?

#### Suggested Indicators
- # and content of agreements
- Action plans; assessment results of action plan implementation
- Agency information products; dissemination records
- Agency fairs: # participants, # attendees, attendee satisfaction
- Record of student service needs identified by students, parents, educators, service providers
- # of service providers invited and attending IEP meetings
- # and description of business and community partners
- # and type of projected service needs; # and type of unmet needs
- # students referred for agency services; # students receiving services

#### Notes and/or Ideas:
**Part 2: Identifying Strengths and Needs**

**(A) Student-Focused Planning Practices and (B) Interagency Collaboration Practices**

Use the information from **Part 1—Assessing Current Implementation** to summarize the current strengths of your transition-focused education and services. Building on the information regarding your strengths, identify specific transition education or service *needs*.

You may find that your needs include a range of activities. In some cases, you may determine that you need to change *practice* in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a *policy* change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a *form* can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

To help develop plans that address your needs, use the space provided to indicate the *kind of action* required to address each need you identify (practice, policy, or form) and then code your identified needs with respect to their *priority and/or immediacy* (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

<table>
<thead>
<tr>
<th>Kinds of Actions:</th>
<th>Practice</th>
<th>Form</th>
<th>Policy</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority:</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Immediacy:</td>
<td>Immediate</td>
<td>Long-term</td>
<td>Intermediate</td>
<td></td>
</tr>
</tbody>
</table>

**Example: Student-Focused Planning Practices**

<table>
<thead>
<tr>
<th><strong>STUDENT-FOCUSED PLANNING PRACTICES</strong></th>
<th><strong>CURRENT STRENGTHS</strong></th>
<th><strong>NEEDS</strong></th>
<th><strong>PRIORITY/IMMEDIACY</strong></th>
</tr>
</thead>
</table>
| 6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting. | ‣ IEP review indicated about 75% of students attended their IEP meeting  
‡ Site review indicates some teachers integrating IEP planning and involvement strategies in their curricula | ‣ Evaluations of the IEP meetings indicated many students were only passively involved in identifying their interests and preferences  
‡ Greater implementation of evidence-based strategies to support student involvement is needed | High  
Immediate |
## A. Student-Focused Planning Practices

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<tr>
<td>5. Students, families, educators, and relevant service providers (with parent/guardian permission) work together to plan and provide instruction and services.</td>
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<td></td>
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</tbody>
</table>
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the last page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Example:

<table>
<thead>
<tr>
<th>Interagency Collaboration Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Focus:</strong> Formal collaborative agreements and structures are established among schools, employers, human service agencies, and post-secondary institutions through which roles and responsibilities are clearly articulated, including:</td>
</tr>
<tr>
<td>a. Methods of communication</td>
</tr>
<tr>
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</tr>
<tr>
<td>c. Referral protocols</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Goal:</strong> Increase student referrals and # of students receiving services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Specific Goal-Related Activities</strong></td>
</tr>
<tr>
<td>1. Develop an interagency council</td>
</tr>
<tr>
<td>2. Develop a memorandum of agreement (MOU)</td>
</tr>
<tr>
<td>3. Establish new referral procedures</td>
</tr>
<tr>
<td>4. Develop agency information guides</td>
</tr>
<tr>
<td>5. Identify transition contact for each agency</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Outputs/Products</strong></th>
<th><strong>Expected Outcomes</strong></th>
<th><strong>Potential Indicators</strong></th>
<th><strong>Data Sources</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>· Interagency council</td>
<td>· Increased student referral</td>
<td>· # referrals by agency &amp; service</td>
<td>· Agency referral records</td>
</tr>
<tr>
<td>· MOUs</td>
<td>· Increased # students receiving specific services</td>
<td>· # students receiving services/agency/service</td>
<td>· Agency service records</td>
</tr>
<tr>
<td>· Information guide</td>
<td>· Increased student employment</td>
<td>· # students employed</td>
<td>· Agency “closure” records</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>· Follow-up survey</td>
</tr>
<tr>
<td>Specific Goal-Related Activities</td>
<td>Person Responsible</td>
<td>Timeframe</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------</td>
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Additional stakeholders and/or TA needs:
## Student-Focused Planning Practices

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<tr>
<th>Focus:</th>
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<tbody>
<tr>
<td>Goal:</td>
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Additional stakeholders and/or TA needs:
### STUDENT-FOCUSED PLANNING PRACTICES

**Focus:**

**Goal:**

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
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**Additional stakeholders and/or TA needs:**
### INTERAGENCY COLLABORATION PRACTICES

**Focus:**  

**Goal:**

<table>
<thead>
<tr>
<th>Specific Goal-Related Activities</th>
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<th>Timeframe</th>
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Additional stakeholders and/or TA needs:
Part 3: Setting Goals and Planning for Student-Focused Planning and Interagency Collaboration Practices

### INTERAGENCY COLLABORATION PRACTICES

**FOCUS:**

**GOAL:**

<table>
<thead>
<tr>
<th><strong>SPEcIFIC GOAL-RELATED ACTIVITIES</strong></th>
<th><strong>PERSON RESPONSIBLE</strong></th>
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**Additional stakeholders and/or TA needs:**

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### INTERAGENCY COLLABORATION PRACTICES

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Additional stakeholders and/or TA needs:
Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th>FOCUS AREA</th>
<th>CONSIDERATIONS AND CRITERIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>• Be specific.</td>
</tr>
<tr>
<td></td>
<td>• Identify what you are trying to accomplish.</td>
</tr>
<tr>
<td></td>
<td>• Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>• Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal within the scope of your control?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal realistic?</td>
</tr>
<tr>
<td>Activities</td>
<td>• Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Will the activity move you toward your goal?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity theoretically-based?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity do-able with available resources?</td>
</tr>
<tr>
<td>Outputs</td>
<td>• Think in terms of “product” – something that will be produced?</td>
</tr>
<tr>
<td></td>
<td>• Is the “product” producible with the available resources?</td>
</tr>
<tr>
<td></td>
<td>• Will the outputs move you toward your goal?</td>
</tr>
<tr>
<td>Expected Outcomes</td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome an important aspect of your goal(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome specific?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome measurable?</td>
</tr>
<tr>
<td>Outcome Indicators</td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?)</td>
</tr>
<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator specific?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator short or long-term (need both)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator possible with available resources?</td>
</tr>
<tr>
<td>Outcome Data Collection</td>
<td>• Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>• Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>• New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>• What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>• Must information be collected about all students?</td>
</tr>
<tr>
<td></td>
<td>• Can sampling methods be used?</td>
</tr>
<tr>
<td></td>
<td>• Who will collect the information?</td>
</tr>
<tr>
<td></td>
<td>• Do arrangements need to be made for data collection?</td>
</tr>
<tr>
<td></td>
<td>• Do data collection instruments need to be developed?</td>
</tr>
</tbody>
</table>
New Mexico 2008 Summer Transition Institute:
Enhancing School Engagement, School Completion, and Post-School Outcomes for Students with Disabilities

Team Planning Tool for Transition Education and Services

June 8 - 11, 2008
Sagebrush Inn and Conference Center
Taos, New Mexico
New Mexico Transition Institute

Developed by:

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June 2008

Team Planning Tool for Transition Education and Services

Additional resources are available at:

http://www.nsttac.org
http://www.wmich.edu/ccrc
http://homepages.wmich.edu/~kohlerp/research

Taxonomy for Transition Programming
Worksheet for Student-Focused Planning
Worksheet for Student Development
Worksheet for Interagency Collaboration
Worksheet for Family Involvement
Worksheet for Program Structures and Practices

Bibliography


**TRANSITION-FOCUSED EDUCATION**

This planning tool focuses on assisting school-community teams in New Mexico to review and plan their strategies for implementing transition-focused education. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The Taxonomy for Transition Programming, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect broadly on implementation and effectiveness of these practices in your school or district.
TAXONOMY FOR TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation
- Planning Strategies

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Student Development
- Life Skills Instruction
- Employment Skills Instruction
- Career and Vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

Program Structure
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery
### STUDENT-FOCUSED PLANNING

<table>
<thead>
<tr>
<th>IEP Development</th>
<th>Student Participation</th>
<th>Planning Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Options identified for each outcome area or goal</td>
<td>‣ Planning team includes student, family members, and school and participating agency personnel</td>
<td>‣ Self-determination facilitated within the planning process</td>
</tr>
<tr>
<td>‣ Post-secondary education or training goals and objectives specified in the IEP</td>
<td>‣ Assessment information is used as basis for planning</td>
<td>‣ Planning decisions driven by student and family</td>
</tr>
<tr>
<td>‣ Occupational goals and objectives specified</td>
<td>‣ Transition-focused planning begins no later than age 14</td>
<td>‣ Planning process is student-centered</td>
</tr>
<tr>
<td>‣ Community-related and residential goals and objectives specified (e.g., voting)</td>
<td>‣ Meeting time adequate to conduct planning</td>
<td>‣ Student involvement in decision making</td>
</tr>
<tr>
<td>‣ Recreation and leisure goals and objectives specified</td>
<td>‣ Preparation time adequate to conduct planning</td>
<td>‣ Documentation of student interests and preferences</td>
</tr>
<tr>
<td>‣ Educational program corresponds to specific goals</td>
<td>‣ Planning meeting time and place conducive to student and family participation</td>
<td>‣ IEP education for students</td>
</tr>
<tr>
<td>‣ Goals are measurable</td>
<td>‣ Accommodations made for communication needs (e.g., interpreters)</td>
<td>‣ Career counseling services provided to student</td>
</tr>
<tr>
<td>‣ Personal needs are addressed in planning (e.g., financial, medical, guardianship)</td>
<td>‣ Referral to adult service provider(s) occurs prior to student's exit from school</td>
<td>‣ Student self-evaluation of process</td>
</tr>
<tr>
<td>‣ Specific goals and objectives result from consumer choices</td>
<td>‣ Planning team leader identified</td>
<td></td>
</tr>
<tr>
<td>‣ Progress or attainment of goals is reviewed annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Responsibility of participants or agencies specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Evaluation of participant fulfillment of responsibilities</td>
<td></td>
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</tr>
</tbody>
</table>
**TAXONOMY FOR TRANSITION PROGRAMMING**

### STUDENT DEVELOPMENT

<table>
<thead>
<tr>
<th>Life Skills Instruction</th>
<th>Employment Skills Instruction</th>
<th>Career and Occupational Curricula</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Leisure skills training</td>
<td></td>
<td></td>
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<tr>
<td>‣ Social skills training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Self-determination skills training, including goal setting, decision making, and self-advocacy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Independent living skills training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Learning strategies skills training</td>
<td></td>
<td></td>
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<tr>
<td>‣ Work-related behaviors and skills training</td>
<td></td>
<td></td>
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<tr>
<td>‣ Job seeking skills training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Occupation-specific vocational skill training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Career education curriculum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Tech prep curriculum</td>
<td></td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Support Services</th>
<th>Assessment</th>
<th>Structured Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Identification and development of environmental adaptations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Identification and development of accommodations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Identification and development of natural supports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Provision of related services (e.g., OT, PT, speech therapy, transportation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Mentoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Career assessments (including curriculum-based and situational assessment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Academic, cognitive, and adaptive behavior assessments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Apprenticeships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Paid work experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Work study program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Job placement services (prior to school exit)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note.* These student development practices are **in addition** to academic skills development, which provide a fundamental basis for transition education.
### INTERAGENCY COLLABORATION

<table>
<thead>
<tr>
<th>Collaborative Service Delivery</th>
<th>Collaborative Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Coordinated requests for information (e.g., to parents, employers)</td>
<td>‣ Interagency coordinating body that includes consumers, parents, service providers, and employers</td>
</tr>
<tr>
<td>‣ Reduction of system barriers to collaboration</td>
<td>‣ Formal interagency agreement</td>
</tr>
<tr>
<td>‣ Collaborative funding and staffing of transition services</td>
<td>‣ Roles of service providers clearly articulated</td>
</tr>
<tr>
<td>‣ Collaborative development and use of assessment data</td>
<td>‣ Established methods of communication among service providers</td>
</tr>
<tr>
<td>‣ Coordinated and shared delivery of transition-related services</td>
<td>‣ Student information shared among agencies via established procedures (with appropriate release of information and confidentiality)</td>
</tr>
<tr>
<td>‣ Systems information disseminated among cooperating agencies</td>
<td>‣ Single-case management system</td>
</tr>
<tr>
<td>‣ Collaborative program planning and development, including employer involvement</td>
<td>‣ “Lead” agency identified</td>
</tr>
<tr>
<td>‣ Collaborative consultation between special, “regular,” and vocational educators</td>
<td>‣ Designated transition contact person for all service providers</td>
</tr>
<tr>
<td>‣ Collaboration between post-secondary education institutions and the school district</td>
<td></td>
</tr>
</tbody>
</table>
## TAXONOMY FOR TRANSITION PROGRAMMING

### FAMILY INVOLVEMENT

<table>
<thead>
<tr>
<th>Family Involvement</th>
<th>Family Empowerment</th>
<th>Family Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Participation in program policy development</td>
<td>• Pre-IEP planning activities for parents/families</td>
<td>• Training about promoting self-determination</td>
</tr>
<tr>
<td>• Participation in service delivery</td>
<td>• Parents/families presented with choices</td>
<td>• Training about advocacy</td>
</tr>
<tr>
<td>• Involvement in student assessment</td>
<td>• Transition information provided to parents/families prior to student’s age 14</td>
<td>• Training about natural supports</td>
</tr>
<tr>
<td>• Participation in evaluation of student’s program</td>
<td>• Structured method to identify family needs</td>
<td>• Training focused on their own empowerment</td>
</tr>
<tr>
<td>• Parents/families exercise decision making</td>
<td>• Parent/family support network</td>
<td>• Training on transition-related planning process (e.g., IEP, ITP)</td>
</tr>
<tr>
<td>• Parent/family attendance at IEP meeting</td>
<td>• Child care for transition-related planning meetings (e.g., IEP, ITP)</td>
<td>• Training about agencies and services</td>
</tr>
<tr>
<td>• Parents/family members as trainers</td>
<td>• Respite care</td>
<td>• Training on legal issues</td>
</tr>
<tr>
<td>• Parents/family members as mentors</td>
<td>• Information to parents/families provided in their ordinary language</td>
<td></td>
</tr>
<tr>
<td>• Parents/family role in natural support network</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Taxonomy for Transition Programming

## Program Structures

<table>
<thead>
<tr>
<th>Program Philosophy</th>
<th>Program Evaluation</th>
<th>Strategic Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curricula reflect community values, standards, and needs</td>
<td>Data collection is implemented to provide process and outcome information</td>
<td>Strategic planning activities focus on:</td>
</tr>
<tr>
<td>Program planning and curricula are outcome-oriented</td>
<td>Program evaluation is ongoing, used for program improvement, and includes evaluation of student outcomes</td>
<td></td>
</tr>
<tr>
<td>Education is provided in least restrictive environments</td>
<td>Students and families participate in program evaluation</td>
<td>• Community-level issues and services</td>
</tr>
<tr>
<td>Education is provided in integrated settings</td>
<td>Needs assessments provide basis for secondary-level education and post-school community services</td>
<td>• Regional-level issues and services</td>
</tr>
<tr>
<td>Students with diverse needs have access to all educational options</td>
<td>Evaluation of interdisciplinary policy and procedures is conducted annually</td>
<td>• State-level issues and services</td>
</tr>
<tr>
<td>Program planning and options are sensitive to and reflect cultural and ethnic diversity</td>
<td></td>
<td>Collaborative transition bodies and procedures provide structure and process for systemic change</td>
</tr>
<tr>
<td>Program options are flexible to meet individual student needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student transitions are addressed across educational levels</td>
<td></td>
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</tr>
</tbody>
</table>

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**Student-Focused Planning**

**Student Development**

**Interagency Collaboration**

**Family Involvement**
Overview of Team Planning Tool

Over the past decade, New Mexico transition initiatives have focused on facilitating local schools and districts to evaluate their students’ with disabilities in-school and post-school outcomes, and to implement transition-focused education activities designed to improve these outcomes. Further, the New Mexico PED has provided a variety of resources to assist districts and local schools to collect and evaluate data that provide specific information about students’ outcomes, including data regarding the transition indicators 1, 2, 13, and 14 of the Special Education State Performance Plan (SPP) and Annual Performance Report (APR) These indicators are described as follows:

Indicator 1:
Percent of youth with IEPs graduating from high school with a regular diploma compared to percent of all youth in the State graduating with a regular diploma.

(20 U.S.C. 1416 (a)(3)(A))

Indicator 2:
Percent of youth with IEPs dropping out of high school compared to the percent of all youth in the State dropping out of high school.

(20 U.S.C. 1416 (a)(3)(A))

Indicator 13:
Percent of youth aged 16 and above with an IEP that includes coordinated, measurable, annual IEP goals and transition services that will reasonably enable the student to meet the post-secondary goals.

(20 U.S.C. 1416 (a)(3)(B))

Indicator 14:
Percent of youth who had IEPs, are no longer in secondary school and who have been competitively employed, enrolled in some type of postsecondary school, or both, within one year of leaving high school.

(20 U.S.C. 1416 (a)(3)(B))

This planning tool focuses specifically on assisting local teams to summarize their implementation of their transition practices, identify effectiveness of these practices, and assess the availability and integrity of the data associated with determining program effectiveness in terms of student achievement and outcomes. The transition practices are organized through the Taxonomy for Transition Programming and include student-focused planning, student development, interdisciplinary and interagency collaboration, family involvement, and program structures and attributes.

Use Part 1—Current Implementation Assessment, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators that focus on each Taxonomy area. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection. Evaluation findings and data you have collected regarding the SPP/APR indicators will help you identify implementation levels, as well as effectiveness.

In Part 2—Needs Assessment, consider your findings from Part 1 to identify your current strengths regarding the transition practices. Also indicate areas where you find need for improvement. For example, you may determine that you have only some of your students and their parents involved in IEP development. In this case, you might determine that you need to provide professional development regarding student involvement and/or implement new curriculum or planning practices that foster student involvement.
Use **Part 3—Setting Goals and Planning**, to develop plans that address your needs. In developing your plans, be specific. Refer to the checklist on the last page of this tool to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you expect to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! **Thus, one's efforts must begin and end with the knowledge of what students are achieving after leaving high school (SPP/APR Indicator 14).** The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your decisions regarding educational and transition programs and services.

**Fundamental Questions**

Regarding short-term outcomes, do your students have the skills they need to be successful?
- Academic skills?
- Independent living skills?
- Occupational skills and work behaviors?
- Self-determination skills?
Do your students stay in school and graduate?

Regarding long-term outcomes, are your students
- Employed?
- Attending postsecondary education?
- Living independently?
Do your students have the educational and community supports and services they need to be successful?
<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Member:</th>
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<tbody>
<tr>
<td></td>
<td>Position:</td>
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<tr>
<td></td>
<td>Organization:</td>
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<td>Best Address:</td>
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To include all members, use additional pages if necessary.
<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Member:</th>
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<td>Best e-mail:</td>
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To include all members, use additional pages if necessary.
Part 1: Assessing Current Implementation and Effectiveness

This section of the team planning tool guides you to reflect on the extent to which you are implementing the taxonomy practices. Use the **Implementation Rating Scale** to indicate the extent to which the practices or activities are implemented in your school or district. Use the **Evidence Rating Scale** to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

<table>
<thead>
<tr>
<th>Implementation Rating Scale</th>
<th>Evidence Rating Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK - We don’t know what or how we are doing in this area.</td>
<td>DK - We don’t know if data are available, or if so, what they indicate.</td>
</tr>
<tr>
<td>1 - This activity or practice is not occurring.</td>
<td>1 - We do not have any data regarding this practice.</td>
</tr>
<tr>
<td>2 - We are developing this activity or practice, but it is not yet occurring.</td>
<td>2 - We have very limited data regarding this practice OR the quality of the data we have is not very good.</td>
</tr>
<tr>
<td>3 - This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
<td>3 - We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
</tr>
<tr>
<td>4 - This activity or practice occurs regularly, widely, and consistently.</td>
<td>4 - We have high quality data that indicate implementation and/or effectiveness.</td>
</tr>
</tbody>
</table>

**Part 1 Example: Student-Focused Planning Practices**

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living</td>
<td>DK</td>
<td>1</td>
</tr>
</tbody>
</table>

**Description:** Review of IEPs in our school indicated that 30% of students’ IEPs include measurable post-school goals. So – we have limited implementation, but good quality data showing where we need to improve. However, our IEP forms were somewhat difficult to evaluate, because people were not consistent about where they put the information. Need to improve content of IEPs, quality of IEP planning; new form would help.
### A. Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent of Evidence</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>4. Age-appropriate transition assessment information is (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; (c) used as the basis for the IEP; and (d) presented in the summary of performance at school exit.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>Description:</td>
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<tr>
<td>5. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
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<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
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</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions
- To what extent do students and their parents actively participate in the development of their individual education program (IEP)? What strategies are used to foster student and parent participation? How are students prepared to participate?
- How is information regarding students’ interests, preferences, and needs used to identify *postsecondary goals*?
- To what extent and how is transition-related assessment information (i.e., academic, cognitive, occupational, and/or adaptive behavior assessment information) used in developing *annual goals and objectives* and to determine related *service needs*?
- To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student’s educational program?
- To what extent do students’ educational programs include goals and objectives identified by the student?
- To what extent are the goals and objectives identified in students’ educational programs (including “transition services”) implemented and evaluated?
- What strategies are used to insure that agency personnel (with parent/guardian permission) and other appropriate individuals actively participate in planning meetings?
- To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered?
- What procedures are used to address discrepancies between services promised and services provided?

#### Suggested Indicators
- # students whose present level of academic achievement and functional performance (PLAAFP) regarding transition goals and services are based on transition-related assessments
- # students with measurable post-school goals
- # IEP goals that are student-initiated
- # students with goal-related annual objectives and transition services
- # students attending their IEP meeting; level of student participation
- # students whose course of study aligns with post-school goals

#### Notes and/or Ideas
# B. Student Development Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Age-appropriate transition assessment information (e.g., academic,</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>cognitive, career/occupational, adaptive behavior, etc.) is routinely</td>
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<tr>
<td>collected.</td>
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<tr>
<td><strong>Description:</strong></td>
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</tr>
<tr>
<td>2. Academic skill development</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
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</tr>
<tr>
<td>3. Life skills development, including self-determination skills</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent of Evidence</td>
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<tr>
<td>--------------------------------------------------------------------------</td>
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<tr>
<td>4. Employment and occupational skills development, including paid work experience</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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<tr>
<td>5. Identification and provision of support services that foster students’ skill development and achievement of post-school goals (e.g., environmental adaptations; accommodations; related services such as AT, OT, etc; positive behavior supports.)</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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</tbody>
</table>
### Reflective Questions

- What transition-related assessment information is collected (i.e., academic, career/occupational, and/or adaptive behavior information)? When is it collected? By whom? How is it collected?
- How are target skills determined and subsequently evaluated? What do these assessments indicate regarding student learning/achievement of target skills?
- Do students’ educational programs align with their post-school goals?
- To what extent do all students participate in work-based education, including paid and/or unpaid work experiences, during high school?
- In which occupational areas are students employed during their work experiences?
- Are students’ work experiences aligned with their post-school goals?
- Are students’ work experiences aligned with their course of study?
- How are students informed of and recruited for co-curricula and extra-curricular activities?
- Do students have the skills they need to be successful, including: Academic skills? Independent living skills? Occupational skills? Employability and work behaviors? Self-determination skills?
- To what extent do students have the supports, accommodations, and/or related services they need to access work experiences?
- How are student accommodation needs identified?
- What methods are used to help students generalize their accommodation needs from school to community environments?

### Suggested Indicators

- # and % of students receiving services in specific settings
- Cognitive, academic, occupational, and adaptive behavior assessments used; student performance on assessments
- Specific strategies for student recruitment to co- and extracurricular activities
- # students participating in work-based, co-curricular, and extracurricular activities
- # and % of accommodation needs met and unmet
- % mastery of target skills

### Notes and/or Ideas:
### C. Interagency Collaboration Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Formal collaborative agreements and structures are established among</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>schools, employers, employment-related agencies, and post-secondary institutes.</td>
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<tr>
<td>These agreements clearly articulate the roles and responsibilities to assure the following occur in culturally appropriate ways:</td>
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<tr>
<td>a. Methods of communication</td>
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<tr>
<td>b. Information sharing protocols</td>
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<tr>
<td>c. Referral protocols</td>
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<tr>
<td>d. Service and task responsibilities</td>
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<tr>
<td>e. Funding responsibilities</td>
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<td></td>
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<tr>
<td>f. Points of contact</td>
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</tbody>
</table>

Description:
<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Educators, service providers, and employers work together to identify and address transition education and service needs of individual students in ways that are responsive to their cultural and linguistic backgrounds.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Educators, service providers, and employers work together to identify and address school and community level transition education and service issues, including program development and evaluation, based upon the community context.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions
- How many schools have up-to-date collaborative agreements with their local service agencies, employment agencies, youth development programs, etc.?
- What agencies and/or organizations are included in the agreements?
- Are formal meetings held? How often?
- Is information available and disseminated regarding agency services, eligibility requirements, and referral protocols?
- How and to what extent do various educators and service agencies coordinate, collect, and share assessment information?
- To what extent do rehabilitation counselors, and/or other relevant service providers actively participate in IEP development and/or meetings?
- How are parents and students informed about the differences between secondary IDEA services and post-secondary and/or adult services under 504 and ADA?
- How are businesses and labor unions involved in identifying standards, developing curricula, participating in career awareness and exploration, providing work-based education, and providing professional development for teachers?
- How are community-level transition service needs identified?
- What services do students need but do not get?

#### Suggested Indicators
- # and content of agreements
- Action plans; assessment results of action plan implementation
- Agency information products; dissemination records
- Agency fairs: # participants, # attendees, attendee satisfaction
- Record of student service needs identified by students, parents, educators, service providers
- # of service providers invited and attending IEP meetings
- # and description of business and community partners
- # and type of projected service needs; # and type of unmet needs
- # students referred for agency services; # students receiving services

#### Notes and/or Ideas:
## D. Family Involvement Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Families are <em>involved</em> in the education of their children and</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
</tr>
<tr>
<td>educational planning process in a variety of ways.</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
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<tr>
<td><strong>Description:</strong></td>
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<tr>
<td>2. Parent and family involvement and <em>empowerment</em> are promoted and</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
</tr>
<tr>
<td>supported through a variety of strategies based on their needs.</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. <em>Training</em> opportunities and <em>resources</em> are provided for parents and</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
</tr>
<tr>
<td>families regarding transition education and services.</td>
<td>DK 1  2  3  4</td>
<td>DK 1  2  3  4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
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</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions

- To what extent and how are parents and/or families of all students included in providing professional development activities, program planning, program implementation, and/or program evaluation?
- How satisfied are parents and family members with their involvement program activities?
- How are family needs identified?
- How is information regarding IEP and other school meetings communicated to families?
- How are family decisions supported?
- How and when is transition services information provided?
- Are parents aware of services available for their children?
- To what extent are training opportunities provided for parents and family members? How effective are these activities in increasing parents’ knowledge and skills?
- Do parents understand their legal rights?

#### Suggested Indicators

- # and % of parents/family members who attend their child’s IEP meeting
- # and % who participate in specific program activities
- # and % who participate in some aspect of their child’s education (e.g., provide assessment information)
- Parent satisfaction with transition education and services their individual children receive
- # and % of parent IEP notices that include: purpose of meeting is transition, student is invited, agency is invited with parent consent
- Parent/family knowledge of transition services and potential providers, transition planning procedures, their legal rights, family resources
- # of positive contacts with parents; ratio of positive to negative
- # and % of family needs identified, addressed, and met
- # and types of training activities provided
- # and % of parents who attend training activities
- Parent satisfaction with training activities

#### Notes and/or Ideas:
## E. Program Structures

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Educational planning, programs, and curricula are transition-oriented</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>and feature outcome-based education, cultural and linguistic sensitivity,</td>
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<tr>
<td>a range of curricular options, and emphasize access and success for all</td>
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<tr>
<td>students.</td>
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<tr>
<td>Description:</td>
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<tr>
<td>2. Ongoing program evaluation that includes analysis of post-school</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>outcomes is used for community needs assessment and program improvement.</td>
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<tr>
<td>Description:</td>
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<tr>
<td>3. Strategic planning is conducted to identify and address community,</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>district, and state-level issues and services regarding transition</td>
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<td>education and services.</td>
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<td>Description:</td>
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<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent/Quality of Evidence</td>
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<tr>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>4. Specific and consistent policies and procedures that support implementation of effective practices are established, clearly communicated, and implemented within and between educational and community service agencies.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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</tr>
<tr>
<td>5. Educators and other transition service providers meet established transition-related competencies through initial and continuing professional development that includes technical assistance and transition resources regarding evidence-based practices.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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</tr>
<tr>
<td>6. With student and family input, sufficient resources are allocated to meet identified needs and optimize impact, including provision of services in integrated, community-based settings.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td><strong>Description:</strong></td>
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</table>
### Reflective Questions and Indicators

#### Reflective Questions

- To what extent is transition-focused education reflected in local and district mission statements? To what extent is this mission implemented?
- What are local schools’ expectations for all their students, including students of different abilities, genders, and cultural and language backgrounds?
- To what extent are a range of placement and service options available? How are placement decisions made?
- What aspects of transition-related education and services are evaluated? How are they evaluated?
- What outcomes do students achieve with respect to employment, postsecondary education, independent living, social and recreation, and community participation?
- Do current data collection systems at local and district levels satisfy data information needs? Are these systems compatible?
- To what extent and how are data collected, combined, and used to identify and address service and funding needs?
- To what extent and how are student outcome data and other program evaluation information used in strategic planning?
- How is information generated through state and local strategic planning used to inform regional and state planning and service delivery?
- How do local and district policies facilitate and/or inhibit implementation of effective transition practices?
- How are results for students with disabilities included in accountability standards? What incentives and/or disincentives are used to foster accountability for students’ post-school outcomes at the local level?
- Do educators and service providers meet transition-related competency standards?
- To what extent are state and local resources adequate to meet the education and transition service needs of all students?
- How do resource policies need to be changed to enhance or expand resource allocation for transition education and services?

#### Notes and/or Ideas:
### Suggested Indicators

- Existence of inclusive mission statement; list of activities and policy actions that indicate implementation of mission
- # and % of students receiving services in specific settings and/or programs (e.g., career and technical education)
- Evaluation plans that include evaluation questions, information sources, time frame, analysis, and reporting procedures
- Students’ post-school outcomes (Indicator 14 data)
- Summary of student service needs generated from IEP documents
- Strategic plans
- Protocol for providing local needs information to regional and state bodies
- Policies and/or criteria for student participation in academic programs, career and technical education, and co-curricular and extracurricular activities, including paid work experience
- Policies regarding IEP planning and development
- Policies regarding collaboration within education, and with families, service providers, and businesses
- Transition-related competencies for educators and service providers
- Performance on state certification exams
- Accountability standards and evidence
- Needs assessment regarding transition resource materials, professional development (PD), and technical assistance (TA)
- Student, family, educator, and service provider satisfaction with resource materials, professional development, and TA
- Educational and service agency funds allocated for transition services
- Service delivery needs assessments with corresponding cost projections and funding sources
- Transition-related positions funded by “blended” sources (e.g., rehabilitation counselor licensure)
- Analysis of funding-related policies (e.g., use of state education funds for providing transition education and services)

### Notes and/or Ideas:
Part 2: Identifying Strengths and Needs

Use the information from Part 1—Assessing Current Implementation to summarize the current strengths of your transition-focused education and services. Building on the information regarding your strengths, identify specific transition education or service needs. To help develop plans that address your needs, use the space provided to code your identified needs with respect to their priority and/or immediacy (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

You may find that your needs include a range of activities. In some cases, you may determine that you need to change practice in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a policy change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a form can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

Priority: Immediacy:
- High    ∘ Immediate
- Medium  ∘ Intermediate
- Low     ∘ Long-term

Part 2 Example: Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>STUDENT-FOCUSED PLANNING PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY/ IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
<td>♦ IEP review indicated about 75% of students attended their IEP meeting ♦ Site review indicates some teachers integrating IEP planning and involvement strategies in their curricula</td>
<td>♦ Evaluations of the IEP meetings indicated many students were only passively involved in identifying their interests and preferences ♦ Greater implementation of evidence-based strategies to support student involvement is needed</td>
<td>High Immediate</td>
</tr>
</tbody>
</table>
## A. Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>STUDENT-FOCUSED PLANNING PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY/IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living.</td>
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<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
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<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
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<tr>
<td>STUDENT-FOCUSED PLANNING PRACTICES</td>
<td>CURRENT STRENGTHS</td>
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<tr>
<td>4. Age-appropriate transition assessment information is (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.</td>
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<tr>
<td>5. Students, families, educators, and relevant service providers (with parent/guardian permission) work together to plan and provide instruction and services.</td>
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</tr>
<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
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</table>
### B. Student Development Practices

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<thead>
<tr>
<th>STUDENT-DEVELOPMENT PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Age-appropriate transition assessments</td>
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<tr>
<td>2. Academic skill development</td>
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<tr>
<td>3. Life skills development, including self-determination skills</td>
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<tr>
<td>4. Employment skills development, including paid work experience</td>
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<tr>
<td>5. Identification and provision of support services</td>
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</table>
## C. Interagency Collaboration Practices

<table>
<thead>
<tr>
<th>Interagency Collaboration Practices</th>
<th>Current Strengths</th>
<th>Needs</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Formal collaborative agreements and structures are established that facilitate collaborative service delivery, including designated roles and responsibilities of educators and service providers.</td>
<td></td>
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<tr>
<td>2. Educators, service providers, and employers work together to identify and address transition education and service needs of individual students in ways that are responsive to their cultural and linguistic backgrounds.</td>
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<tr>
<td>3. Educators, service providers, and employers work together to identify and address school and community level transition education and service issues, including program development and evaluation, based upon the community context.</td>
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</tbody>
</table>
D. Family Involvement Practices

<table>
<thead>
<tr>
<th>FAMILY INVOLVEMENT PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Families are <em>involved</em> in the education of their children and educational planning process in a variety of ways.</td>
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</tr>
<tr>
<td>2. Parent and family involvement and <em>empowerment</em> are promoted and supported through a variety of strategies based on their needs.</td>
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</tr>
<tr>
<td>3. <em>Training</em> opportunities and <em>resources</em> are provided for parents and families regarding transition education and services.</td>
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</tbody>
</table>
## E. Program Structures

<table>
<thead>
<tr>
<th>PROGRAM STRUCTURES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Educational planning, programs, and curricula are transition-oriented and feature outcome-based education, cultural and linguistic sensitivity, a range of curricular options, and emphasize access and success for all students.</td>
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</tr>
<tr>
<td>2. Ongoing program evaluation that includes analysis of post-school outcomes is used for community needs assessment and program improvement.</td>
<td></td>
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</tr>
<tr>
<td>3. Strategic planning is conducted to identify and address community, district, and state-level issues and services regarding transition education and services.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROGRAM STRUCTURES CONT’D</td>
<td>CURRENT STRENGTHS</td>
<td>NEEDS</td>
<td>PRIORITY</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>4. Specific and consistent policies and procedures that support implementation of effective practices are established, clearly communicated, and implemented within and between educational and community service agencies.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Educators and other transition service providers meet established transition-related competencies through initial and continuing professional development that includes technical assistance and transition resources regarding evidence-based practices.</td>
<td></td>
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</tr>
<tr>
<td>6. With student and family input, sufficient resources are allocated to meet identified needs and optimize impact, including provision of services in integrated, community-based settings.</td>
<td></td>
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</tr>
</tbody>
</table>
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the next page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Part 3 Example: Student Development Practices

<table>
<thead>
<tr>
<th>STUDENT DEVELOPMENT PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Our focus for student-focused planning is on:</strong> Employment and occupational skills development, including paid work experience</td>
</tr>
<tr>
<td><strong>Our goal for student-focused planning is:</strong> Increase # of students participating in work experience and/or work-based training</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
<th>TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify possible community liaisons to develop training sites</td>
<td>Ellen (education) with Lynn and Anna (job coaches/para-educators), Audrey R. (rehab), Julia (transition coordinator), and community members</td>
<td>1. Complete by December 31</td>
</tr>
<tr>
<td>2. Establish expected outcomes and expectations for students and community liaisons</td>
<td></td>
<td>2. Complete by December 31</td>
</tr>
<tr>
<td>3. Complete task analysis of work tasks for skill training in classrooms</td>
<td></td>
<td>3. Complete by January 20</td>
</tr>
<tr>
<td>4. Conduct student tours of potential training sites and “new employee orientation”</td>
<td></td>
<td>4. Complete by February 10</td>
</tr>
<tr>
<td>5. Identify key contacts (employers, job coaches, teachers)</td>
<td></td>
<td>5. Complete by February 28</td>
</tr>
<tr>
<td>6. Assess skills to determine readiness for sites</td>
<td></td>
<td>6. Complete by February 28</td>
</tr>
<tr>
<td>7. Place students at training sites</td>
<td></td>
<td>7. Complete by March 10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Task analyses for various job skills</td>
<td>• Increased student participation in work experiences</td>
<td>• # of students participating in work experiences</td>
<td>• Teacher records</td>
</tr>
<tr>
<td>• Creation guide (how to create training sites)</td>
<td>• Increased student employment</td>
<td>• # of students employed after training</td>
<td>• Job coach evaluations/records</td>
</tr>
<tr>
<td></td>
<td>• Increased life skills (budgeting)</td>
<td>• # of students opening banking accounts, purchasing</td>
<td>• Community member surveys</td>
</tr>
</tbody>
</table>
### Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Considerations and Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goals</strong></td>
<td>• Be specific.</td>
</tr>
<tr>
<td></td>
<td>• Identify what you are trying to accomplish.</td>
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<tr>
<td></td>
<td>• Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>• Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal within the scope of your control?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal realistic?</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td>• Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Will the activity move you toward your goal?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity theoretically-based?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity do-able with available resources?</td>
</tr>
<tr>
<td><strong>Outputs</strong></td>
<td>• Think in terms of “product” – something that will be produced?</td>
</tr>
<tr>
<td></td>
<td>• Is the “product” producible with the available resources?</td>
</tr>
<tr>
<td></td>
<td>• Will the outputs move you toward your goal?</td>
</tr>
<tr>
<td><strong>Expected Outcomes</strong></td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome specific?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome measurable?</td>
</tr>
<tr>
<td><strong>Outcome Indicators</strong></td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.)?</td>
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<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
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<tr>
<td></td>
<td>• Is the indicator specific?</td>
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<tr>
<td></td>
<td>• Is the indicator measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator short or long-term (need both)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator possible with available resources?</td>
</tr>
<tr>
<td><strong>Outcome Data Collection</strong></td>
<td>• Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>• Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>• New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>• What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>• Must information be collected about all students?</td>
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<td></td>
<td>• Can sampling methods be used?</td>
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<td></td>
<td>• Who will collect the information?</td>
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<td></td>
<td>• Do arrangements need to be made for data collection?</td>
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<td></td>
<td>• Do data collection instruments need to be developed?</td>
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</table>
### Student-Focused Planning Practices

Our focus for student-focused planning is on:

Our goal for student-focused planning is:

<table>
<thead>
<tr>
<th>Specific Goal-Related Activities</th>
<th>Person Responsible</th>
<th>Timeframe</th>
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<thead>
<tr>
<th>Outputs/Products</th>
<th>Expected Outcomes</th>
<th>Potential Indicators</th>
<th>Data Sources</th>
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Additional stakeholders and/or technical assistance needs:
**STUDENT DEVELOPMENT PRACTICES**

Our focus for student development is on:

Our goal for student development is:

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**Additional stakeholders and/or technical assistance needs:**
**INTERAGENCY COLLABORATION PRACTICES**

Our focus for interagency collaboration is on:

Our goal for interagency collaboration is:

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Additional stakeholders and/or technical assistance needs:
**FAMILY INVOLVEMENT PRACTICES**

Our focus for family involvement is on:

Our goal for family involvement is:

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
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Additional stakeholders and/or technical assistance needs:
**PROGRAM STRUCTURES**

Our focus for program structures is on:

Our goal for program structures is:

<table>
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</table>

Additional stakeholders and/or technical assistance needs:
Team Planning Tool for
Family Involvement and Program Characteristics

September 4 -5, 2008
Metro Technology Center
Oklahoma City, Oklahoma
Oklahoma Transition Institute  

Team Planning Tool for Family Involvement and Program Characteristics

Developed by:
Paula D. Kohler, Ph.D., Professor and Co-Principal Investigator  
National Secondary Transition Technical Assistance Center  
Department of Special Education and Literacy Studies  
Western Michigan University  
3506 Sangren Hall  
Kalamazoo, MI 49008  
269.387.6181  

September 2008

Additional resources are available at:

- http://www.nsttac.org
- http://www.wmich.edu/ccrc
- http://homepages.wmich.edu/~kohlerp/research

Worksheet for Student-Focused Planning  
Worksheet for Student Development  
Worksheet for Interagency Collaboration  
Worksheet for Family Involvement  
Worksheet for Program Structures and Practices

Bibliography


Transition-Focused Education

This planning tool focuses on assisting school-community teams in New Mexico to review and plan their strategies for implementing transition-focused education. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The Taxonomy for Transition Programming, represented on the next page, provides concrete practices—identified from effective programs—for implementing family involvement and program characteristics. As described in the next section, this tool is designed to help you reflect broadly on implementation and effectiveness of these practices in your school or district.
TAXONOMY FOR TRANSITION PROGRAMMING

Student-Focused Planning
- IEP Development
- Student Participation
- Planning Strategies

Family Involvement
- Family Training
- Family Involvement
- Family Empowerment

Student Development
- Life Skills Instruction
- Employment Skills Instruction
- Career and Vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

Program Structure
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

Interagency Collaboration
- Collaborative Framework
- Collaborative Service Delivery
## Taxonomy for Transition Programming

### Family Involvement

<table>
<thead>
<tr>
<th>Family Involvement</th>
<th>Family Empowerment</th>
<th>Family Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Participation in program policy development</td>
<td>• Pre-IEP planning activities for parents/families</td>
<td>• Training about promoting self-determination</td>
</tr>
<tr>
<td>• Participation in service delivery</td>
<td>• Parents/families presented with choices</td>
<td>• Training about advocacy</td>
</tr>
<tr>
<td>• Involvement in student assessment</td>
<td>• Transition information provided to parents/families prior to student’s age 14</td>
<td>• Training about natural supports</td>
</tr>
<tr>
<td>• Participation in evaluation of student’s program</td>
<td>• Structured method to identify family needs</td>
<td>• Training focused on their own empowerment</td>
</tr>
<tr>
<td>• Parents/families exercise decision making</td>
<td>• Parent/family support network</td>
<td>• Training on transition-related planning process (e.g., IEP, ITP)</td>
</tr>
<tr>
<td>• Parent/family attendance at IEP meeting</td>
<td>• Child care for transition-related planning meetings (e.g., IEP, ITP)</td>
<td>• Training about agencies and services</td>
</tr>
<tr>
<td>• Parents/family members as trainers</td>
<td>• Respite care</td>
<td>• Training on legal issues</td>
</tr>
<tr>
<td>• Parents/family members as mentors</td>
<td>• Information to parents/families provided in their ordinary language</td>
<td></td>
</tr>
<tr>
<td>• Parents/family role in natural support network</td>
<td></td>
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</tbody>
</table>
## TAXONOMY FOR TRANSITION PROGRAMMING

<table>
<thead>
<tr>
<th>Program Philosophy</th>
<th>Program Evaluation</th>
<th>Strategic Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curricula reflect community values, standards, and needs</td>
<td>Data collection is implemented to provide process and outcome information</td>
<td>Strategic planning activities focus on:</td>
</tr>
<tr>
<td>Program planning and curricula are outcome-oriented</td>
<td>Program evaluation is ongoing, used for program improvement, and includes evaluation of student outcomes</td>
<td>- Community-level issues and services</td>
</tr>
<tr>
<td>Education is provided in least restrictive environments</td>
<td>Students and families participate in program evaluation</td>
<td>- Regional-level issues and services</td>
</tr>
<tr>
<td>Education is provided in integrated settings</td>
<td>Needs assessments provide basis for secondary-level education and post-school community services</td>
<td>- State-level issues and services</td>
</tr>
<tr>
<td>Students with diverse needs have access to all educational options</td>
<td>Evaluation of interdisciplinary policy and procedures is conducted annually</td>
<td>Collaborative transition bodies and procedures provide structure and process for systemic change</td>
</tr>
<tr>
<td>Program planning and options are sensitive to and reflect cultural and ethnic diversity</td>
<td></td>
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<tr>
<td>Program options are flexible to meet individual student needs</td>
<td></td>
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<tr>
<td>Student transitions are addressed across educational levels</td>
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</table>
Overview of Team Planning Tool

Adapted for the Third Annual Oklahoma Transition Institute, this planning tool focuses on assisting teams to review specific practices within the Family Involvement and Program Structures categories of the Taxonomy for Transition Programming, such as increasing family involvement in the IEP, and the use of evaluation for continuous program improvement to help students to achieve their goals. Team planning sessions during the transition institute will focus on three primary activities—reflecting on the extent to which and how you currently implement these practices, determining your current strengths and needs, and developing specific goals to address your needs. This planning tool is designed to help guide you through this process.

Use Part 1—Current Implementation Assessment, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators that focus on each Taxonomy area. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection. Evaluation findings and data you have collected regarding the SPP/APR indicators will help you identify implementation levels, as well as effectiveness.

In Part 2—Needs Assessment, consider your findings from Part 1 to identify your current strengths regarding the transition practices. Also indicate areas where you find need for improvement. For example, you may determine that you have only some of your students and their parents involved in IEP development. In this case, you might determine that you need to provide professional development regarding student involvement and/or implement new curriculum or planning practices that foster student involvement.

Use Part 3—Setting Goals and Planning, to develop plans that address your needs. In developing your plans, be specific. Refer to the checklist on the last page of this tool to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you expect to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! Thus, one’s efforts must begin and end with the knowledge of what students are achieving after leaving high school (SPP/APR Indicator 14). The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your decisions regarding educational and transition programs and services.

Fundamental Questions

Regarding short-term outcomes, do your students have the skills they need to be successful?

- Academic skills?
- Independent living skills?
- Occupational skills and work behaviors?
- Self-determination skills?

Do your students stay in school and graduate?

Regarding long-term outcomes, are your students

- Employed?
- Attending postsecondary education?
- Living independently?

Do your students have the educational and community supports and services they need to be successful?
<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Member:</th>
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<tbody>
<tr>
<td>Team Leader:</td>
<td>Position:</td>
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<tr>
<td>Position:</td>
<td>Organization:</td>
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To include all members, use additional pages if necessary.
Part 1: Assessing Current Implementation and Effectiveness

This section of the team planning tool guides you to reflect on the extent to which you are implementing the family involvement and program structures practices. Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in your school or district. Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

### Implementation Rating Scale

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK</td>
<td>We don't know what or how we are doing in this area.</td>
</tr>
<tr>
<td>1</td>
<td>This activity or practice is not occurring.</td>
</tr>
<tr>
<td>2</td>
<td>We are developing this activity or practice, but it is not yet occurring.</td>
</tr>
<tr>
<td>3</td>
<td>This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
</tr>
<tr>
<td>4</td>
<td>This activity or practice occurs regularly, widely, and consistently.</td>
</tr>
</tbody>
</table>

### Evidence Rating Scale

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK</td>
<td>We don't know if data are available, or if so, what they indicate.</td>
</tr>
<tr>
<td>1</td>
<td>We do not have any data regarding this practice.</td>
</tr>
<tr>
<td>2</td>
<td>We have very limited data regarding this practice or the quality of the data we have is not very good.</td>
</tr>
<tr>
<td>3</td>
<td>We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
</tr>
<tr>
<td>4</td>
<td>We have high quality data that indicate implementation and/or effectiveness.</td>
</tr>
</tbody>
</table>

---

**Part 1 Example: Family Involvement**

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Families are involved in the education of their children and educational planning process in a variety of ways.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:**
- 95% of grades 9-12 parents attended their child’s IEP meeting
- 60% of grades 9-12 parents participated in a specific program activity:
  - Parent trainer as partner in 100% of professional dev. workshops for teachers
  - PAC implemented transition needs assessment used for program improvement
- 100% of parents invited to provide career info to class; 60% attended
- 50% parents or family member provided assessment information
### A. Family Involvement Practices

<table>
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</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Parent and family involvement and <em>empowerment</em> are promoted and supported through a variety of strategies based on their needs.</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>3. <em>Training</em> opportunities and <em>resources</em> are provided for parents and families regarding transition education and services.</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
### Reflective Questions and Indicators

#### Reflective Questions
- To what extent and how are parents and/or families of all students included in providing professional development activities, program planning, program implementation, and/or program evaluation?
- How satisfied are parents and family members with their involvement in program activities?
- How are family needs identified?
- How is information regarding IEP and other school meetings communicated to families?
- How are family decisions supported?
- How and when is transition services information provided?
- Are parents aware of services available for their children?
- To what extent are training opportunities provided for parents and family members? How effective are these activities in increasing parents’ knowledge and skills?
- Do parents understand their legal rights?

#### Suggested Indicators
- # and % of parents/family members who attend their child’s IEP meeting
- # and % who participate in specific program activities
- # and % who participate in some aspect of their child’s education (e.g., provide assessment information)
- Parent satisfaction with transition education and services their individual children receive
- # and % of parent IEP notices that include: purpose of meeting is transition, student is invited, agency is invited with parent consent
- Parent/family knowledge of transition services and potential providers, transition planning procedures, their legal rights, family resources
- # of positive contacts with parents; ratio of positive to negative
- # and % of family needs identified, addressed, and met
- # and types of training activities provided
- # and % of parents who attend training activities
- Parent satisfaction with training activities

#### Notes and/or Ideas:
### B. Program Structures

<table>
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<tr>
<th>Practices</th>
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<tr>
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<tr>
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</tr>
<tr>
<td>4. Specific and consistent policies and procedures that support implementation of effective practices are established, clearly communicated, and implemented within and between educational and community service agencies.</td>
<td>DK 1 2 3 4</td>
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<tr>
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</tr>
<tr>
<td>5. Educators and other transition service providers meet established transition-related competencies through initial and continuing professional development that includes technical assistance and transition resources regarding evidence-based practices.</td>
<td>DK 1 2 3 4</td>
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<td>6. With student and family input, sufficient resources are allocated to meet identified needs and optimize impact, including provision of services in integrated, community-based settings.</td>
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<td><strong>Description:</strong></td>
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<td></td>
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</table>
### Reflective Questions and Indicators

#### Reflective Questions

- To what extent is transition-focused education reflected in local and district mission statements? To what extent is this mission implemented?
- What are local schools’ expectations for all their students, including students of different abilities, genders, and cultural and language backgrounds?
- To what extent are a range of placement and service options available? How are placement decisions made?
- What aspects of transition-related education and services are evaluated? How are they evaluated?
- What outcomes do students achieve with respect to employment, postsecondary education, independent living, social and recreation, and community participation?
- Do current data collection systems at local and district levels satisfy data information needs? Are these systems compatible?
- To what extent and how are data collected, combined, and used to identify and address service and funding needs?
- To what extent and how are student outcome data and other program evaluation information used in strategic planning?
- How is information generated through state and local strategic planning used to inform regional and state planning and service delivery?
- How do local and district policies facilitate and/or inhibit implementation of effective transition practices?
- How are results for students with disabilities included in accountability standards? What incentives and/or disincentives are used to foster accountability for students’ post-school outcomes at the local level?
- Do educators and service providers meet transition-related competency standards?
- To what extent are state and local resources adequate to meet the education and transition service needs of all students?
- How do resource policies need to be changed to enhance or expand resource allocation for transition education and services?

#### Notes and/or Ideas:
<table>
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<th>Suggested Indicators</th>
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<tr>
<td>‣ Existence of inclusive mission statement; list of activities and policy actions that indicate implementation of mission</td>
</tr>
<tr>
<td>‣ # and % of students receiving services in specific settings and/or programs (e.g., career and technical education)</td>
</tr>
<tr>
<td>‣ Evaluation plans that include evaluation questions, information sources, time frame, analysis, and reporting procedures</td>
</tr>
<tr>
<td>‣ Students’ post-school outcomes (Indicator 14 data)</td>
</tr>
<tr>
<td>‣ Summary of student service needs generated from IEP documents</td>
</tr>
<tr>
<td>‣ Strategic plans</td>
</tr>
<tr>
<td>‣ Protocol for providing local needs information to regional and state bodies</td>
</tr>
<tr>
<td>‣ Policies and/or criteria for student participation in academic programs, career and technical education, and co-curricular and extracurricular activities, including paid work experience</td>
</tr>
<tr>
<td>‣ Policies regarding IEP planning and development</td>
</tr>
<tr>
<td>‣ Policies regarding collaboration within education, and with families, service providers, and businesses</td>
</tr>
<tr>
<td>‣ Transition-related competencies for educators and service providers</td>
</tr>
<tr>
<td>‣ Performance on state certification exams</td>
</tr>
<tr>
<td>‣ Accountability standards and evidence</td>
</tr>
<tr>
<td>‣ Needs assessment regarding transition resource materials, professional development (PD), and technical assistance (TA)</td>
</tr>
<tr>
<td>‣ Student, family, educator, and service provider satisfaction with resource materials, professional development, and TA</td>
</tr>
<tr>
<td>‣ Educational and service agency funds allocated for transition services</td>
</tr>
<tr>
<td>‣ Service delivery needs assessments with corresponding cost projections and funding sources</td>
</tr>
<tr>
<td>‣ Transition-related positions funded by “blended” sources (e.g., rehabilitation counselor licensure)</td>
</tr>
<tr>
<td>‣ Analysis of funding-related policies (e.g., use of state education funds for providing transition education and services)</td>
</tr>
</tbody>
</table>

Notes and/or Ideas:
Part 2: Identifying Strengths and Needs

Use the information from Part 1—Assessing Current Implementation to summarize the current strengths of your family involvement and program structures practices. Building on the information regarding your strengths, identify specific family involvement and program structures needs. To help develop plans that address your needs, use the space provided to code your identified needs with respect to their priority and/or immediacy (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

You may find that your needs include a range of activities. In some cases, you may determine that you need to change practice in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a policy change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a form can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

**Priority:**
- High
- Medium
- Low

**Immediacy:**
- Immediate
- Intermediate
- Long-term

<table>
<thead>
<tr>
<th>Program Structures</th>
<th>Current Strengths</th>
<th>Needs</th>
<th>Priority/Immediacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Educational planning, programs, and curricula are transition-oriented and feature outcome-based education, cultural and linguistic sensitivity, a range of curricular options, and emphasize access and success for all students.</td>
<td>- Enrollment in CTE programs increased from previous school year  - All students participate in a co-op experience their junior and senior year</td>
<td>- Identify more outcome-based education options for all students  - Determine if programs are sensitive to culture and language</td>
<td>High Immediate</td>
</tr>
</tbody>
</table>
## A. Family Involvement Practices

<table>
<thead>
<tr>
<th>FAMILY INVOLVEMENT PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>PRIORITY</th>
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<td>PROGRAM STRUCTURES CONT’D</td>
<td>CURRENT STRENGTHS</td>
<td>NEEDS</td>
<td>PRIORITY</td>
</tr>
<tr>
<td>--------------------------</td>
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<td>4. Specific and consistent policies and procedures that support implementation of effective practices are established, clearly communicated, and implemented within and between educational and community service agencies.</td>
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<td></td>
</tr>
<tr>
<td>5. Educators and other transition service providers meet established transition-related competencies through initial and continuing professional development that includes technical assistance and transition resources regarding evidence-based practices.</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the next page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Part 3 Example: Family Involvement

<table>
<thead>
<tr>
<th>FAMILY INVOLVEMENT PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Our focus for family involvement is:</strong> Family participation in and satisfaction with transition services planning</td>
</tr>
</tbody>
</table>

| **Our goal for student-focused planning is:** Increase # of families participating in transition services and planning |

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
<th>TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Revise parent notice regarding IEP meetings</td>
<td>Scott (with Trans. Services Committee), Kelli with PAC, Diana with monitoring, and Pam (spec.ed supervisor)</td>
<td>1. Complete by December 31</td>
</tr>
<tr>
<td>2. Revise IEP meeting scheduling procedures</td>
<td></td>
<td>2. Complete by December 31</td>
</tr>
<tr>
<td>3. Develop and implement parent/family questionnaire</td>
<td></td>
<td>3. Complete by January 20</td>
</tr>
<tr>
<td>4. Develop a parent handbook that includes a framework for what transition will look like for their child, family expectations, and other community resources</td>
<td></td>
<td>4. Complete by February 10</td>
</tr>
<tr>
<td>5. Create a cadre of trainers (parents/family members to train other parents about transition)</td>
<td></td>
<td>5. Complete by February 28</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Parent/family questionnaire</td>
<td>• Increased family involvement in IEPs</td>
<td>• # of families attending IEPs</td>
<td>• Teacher records</td>
</tr>
<tr>
<td>• New parent notice</td>
<td>• Increased family involvement in overall transition planning</td>
<td>• # of families attending school sponsored events</td>
<td>• IEP attendance records</td>
</tr>
<tr>
<td>• Parent handbook</td>
<td>• Increased student participation in IEPs</td>
<td>• # of families participating in overall transition planning (i.e. assessment information)</td>
<td>• Event attendance records</td>
</tr>
<tr>
<td>• List of community resources</td>
<td></td>
<td></td>
<td>• Surveys</td>
</tr>
</tbody>
</table>
### Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Considerations and Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goals</strong></td>
<td>• Be specific.</td>
</tr>
<tr>
<td></td>
<td>• Identify what you are trying to accomplish.</td>
</tr>
<tr>
<td></td>
<td>• Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>• Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td>• Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Will the activity move you toward your goal?</td>
</tr>
<tr>
<td><strong>Outputs</strong></td>
<td>• Think in terms of “product” – something that will be produced?</td>
</tr>
<tr>
<td></td>
<td>• Will the outputs move you toward your goal?</td>
</tr>
<tr>
<td><strong>Expected Outcomes</strong></td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome an important aspect of your goal(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome specific?</td>
</tr>
<tr>
<td><strong>Outcome Indicators</strong></td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.)?</td>
</tr>
<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator specific?</td>
</tr>
<tr>
<td><strong>Outcome Data Collection</strong></td>
<td>• Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>• Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>• New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>• What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>• Must information be collected about all students?</td>
</tr>
<tr>
<td></td>
<td>• Can sampling methods be used?</td>
</tr>
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### FAMILY INVOLVEMENT PRACTICES

Our focus for family involvement is on:

Our goal for family involvement is:

<table>
<thead>
<tr>
<th>Specific Goal-Related Activities</th>
<th>Person Responsible</th>
<th>Timeframe</th>
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</table>

<table>
<thead>
<tr>
<th>Outputs/Products</th>
<th>Expected Outcomes</th>
<th>Potential Indicators</th>
<th>Data Sources</th>
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Additional stakeholders and/or technical assistance needs:
**FAMILY INVOLVEMENT PRACTICES**

Our focus for family involvement is on:

Our goal for family involvement is:

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Additional stakeholders and/or technical assistance needs:
**PROGRAM STRUCTURES**

Our focus for program structures is on:

Our goal for program structures is:

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### Program Structures

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Our goal for program structures is:

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Additional stakeholders and/or technical assistance needs:
Team Planning Tool for Student-Focused Planning and Student Development Practices

2007 Colorado Transition Institute

June 19 – 21, 2007
Breckenridge, CO
Team Planning Tool for Student-Focused Planning and Student Development Practices

Developed by:

Paula D. Kohler, Ph.D., Professor and Co-Principal Investigator
National Secondary Transition Technical Assistance Center
Department of Special Education and Literacy Studies
Western Michigan University
3506 Sangren Hall
Kalamazoo, MI 49008
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June 2007

Additional resources are available at:
http://www.nsttac.org
http://www.wmich.edu/ccrc
http://homepages.wmich.edu/~kohlerp/research
  ‣ Taxonomy for Transition Programming
  ‣ Worksheet for Student-Focused Planning
  ‣ Worksheet for Student Development
  ‣ Worksheet for Interagency Collaboration
  ‣ Worksheet for Family Involvement
  ‣ Worksheet for Program Structures and Practices

Bibliography


2007 Colorado Transition Institute

Team Planning Tool for Student-Focused Planning and Student Development Practices

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# Team Planning Tool for Student-Focused Planning and Student Development Practices

## Team Information

<table>
<thead>
<tr>
<th>Team Name:</th>
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<tbody>
<tr>
<td>Primary Contact:</td>
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<td>Position:</td>
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To include all members, use back of page if necessary
**TRANSITION-FOCUSED EDUCATION**

This planning tool focuses on assisting school-community teams to review and plan their strategies for implementing transition-focused education. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, and community members and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students’ educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when service systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities, delivered through a variety of instructional and transition approaches, and responsive to the local context and students’ learning and support needs. Primary to the concept of transition-focused education is the expectation for all students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders, particularly students and their families.

The *Taxonomy for Transition Programming*, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect broadly on your application of student-focused planning and student development practices—two categories of practices in the taxonomy.
# Taxonomy for Transition Programming

## Student-Focused Planning

<table>
<thead>
<tr>
<th>IEP Development</th>
<th>Student Participation</th>
<th>Planning Strategies</th>
</tr>
</thead>
</table>
| ◦ Options identified for each outcome area or goal  
◦ Post-secondary education or training goals and objectives specified in the IEP  
◦ Occupational goals and objectives specified  
◦ Community-related and residential goals and objectives specified (e.g., voting)  
◦ Recreation and leisure goals and objectives specified  
◦ Educational program corresponds to specific goals  
◦ Goals are measurable  
◦ Personal needs are addressed in planning (e.g., financial, medical, guardianship)  
◦ Specific goals and objectives result from consumer choices  
◦ Progress or attainment of goals is reviewed annually  
◦ Responsibility of participants or agencies specified  
◦ Evaluation of participant fulfillment of responsibilities | ◦ Planning team includes student, family members, and school and participating agency personnel  
◦ Assessment information is used as basis for planning  
◦ Transition-focused planning begins no later than age 14  
◦ Meeting time adequate to conduct planning  
◦ Preparation time adequate to conduct planning  
◦ Planning meeting time and place conducive to student and family participation  
◦ Accommodations made for communication needs (e.g., interpreters)  
◦ Referral to adult service provider(s) occurs prior to student’s exit from school  
◦ Planning team leader identified | ◦ Self-determination facilitated within the planning process  
◦ Planning decisions driven by student and family  
◦ Planning process is student-centered  
◦ Student involvement in decision making  
◦ Documentation of student interests and preferences  
◦ IEP education for students  
◦ Career counseling services provided to student  
◦ Student self-evaluation of process |
### TAXONOMY FOR TRANSITION PROGRAMMING

#### STUDENT DEVELOPMENT

<table>
<thead>
<tr>
<th>Life Skills Instruction</th>
<th>Employment Skills Instruction</th>
<th>Career and Vocational Curricula</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Leisure skills training</td>
<td>‣ Work-related behaviors and skills training</td>
<td>‣ Career education curriculum</td>
</tr>
<tr>
<td>‣ Social skills training</td>
<td>‣ Job seeking skills training</td>
<td>‣ Tech prep curriculum</td>
</tr>
<tr>
<td>‣ Self-determination skills training, including goal setting, decision making, and self-</td>
<td>‣ Occupation-specific vocational skill training</td>
<td></td>
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<tr>
<td>advocacy</td>
<td></td>
<td></td>
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<tr>
<td>‣ Independent living skills training</td>
<td></td>
<td></td>
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<tr>
<td>‣ Learning strategies skills training</td>
<td></td>
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<td></td>
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<tr>
<td>Support Services</td>
<td>Assessment</td>
<td>Structured Work Experience</td>
</tr>
<tr>
<td>‣ Identification and development of environmental adaptations</td>
<td>‣ Career assessments (including curriculum-based and situational assessment)</td>
<td>‣ Apprenticeships</td>
</tr>
<tr>
<td>‣ Identification and development of accommodations</td>
<td>‣ Academic, cognitive, and adaptive behavior assessments</td>
<td>‣ Paid work experience</td>
</tr>
<tr>
<td>‣ Identification and development of natural supports</td>
<td></td>
<td>‣ Work study program</td>
</tr>
<tr>
<td>‣ Provision of related services (e.g., OT, PT, speech therapy, transportation)</td>
<td></td>
<td>‣ Job placement services (prior to school exit)</td>
</tr>
<tr>
<td>‣ Mentoring</td>
<td></td>
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</tbody>
</table>
TEAM PLANNING TOOL OVERVIEW

Adapted for the 2007 Colorado Transition Institute, this planning tool focuses on assisting teams to review specific practices within the Student-Focused Planning and Student Development categories of the Taxonomy for Transition Programming, such as identifying and articulating students’ post-secondary goals, collecting and using transition-related assessment information, and planning and implementing educational programs that prepare students to achieve their goals. Team planning sessions during the transition institute will focus on three primary activities – reflecting on the extent to which and how you currently implement these practices, determining your current strengths and needs, and developing specific goals to address your needs. This planning tool is designed to help guide you through this process.

Use **Part 1—Assessing Current Implementation**, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators that focus on each general area. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection.

In **Part 2—Identifying Strengths and Needs**, synthesize your findings from Part 1 to identify your strengths and needs that emerged during your discussions.

Use **Part 3—Setting Goals and Planning** to develop plans that address your needs. In developing your plans, be specific. Refer to the checklist on the last page of this tool to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you expect to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! **Thus, one’s efforts must begin and end with the knowledge of what students are achieving after leaving high school (SPP indicator 14).** The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your decisions regarding educational and transition programs and services.

**Fundamental Questions**

- Regarding short-term outcomes, do your students have the skills they need to be successful?
  - Academic skills?
  - Independent living skills?
  - Social skills?
  - Occupational skills?
  - Work behaviors?
  - Self-determination skills?

- Regarding long-term outcomes, are your students
  - Employed?
  - Attending postsecondary education?
  - Living independently?
  - Participating in their communities?

- Do your students have the educational and community supports and services they need to be successful?
Part 1: Assessing Current Implementation

This section of the team planning tool guides you to reflect on the extent to which you are implementing the taxonomy practices included in: (A) Student-focused Planning and (B) Student Development. Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in your school or district. Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity. Use the space provided to note how the practice or activity is implemented and what you know about effectiveness. For each set of practices, we include a set of reflective questions and suggested indicators as resources to help provide meaning to the practice statements. The reflective questions are designed to help you go beyond simple “yes” and “no” responses by providing substantive examples of the transition practices. The suggested indicators provide examples of evidence you might examine to determine implementation levels and effectiveness.

### Implementation Rating Scale

<table>
<thead>
<tr>
<th></th>
<th>DK</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>We don’t know what or how we are doing in this area.</td>
<td>This activity or practice is not occurring.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>We are developing this activity or practice, but it is not yet occurring.</td>
<td>This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>This activity or practice occurs regularly, widely, and consistently.</td>
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</table>

### Evidence Rating Scale

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<tr>
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<th>DK</th>
<th>1</th>
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<th>4</th>
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<tbody>
<tr>
<td></td>
<td>We don’t know if data are available, or if so, what they indicate.</td>
<td>We do not have any data regarding this practice.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>We have very limited data regarding this practice OR the quality of the data we have is not very good.</td>
<td>We have some data that indicate implementation and/or effectiveness of the activity or practice.</td>
<td></td>
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<tr>
<td></td>
<td>We have high quality data that indicate implementation and/or effectiveness.</td>
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</tbody>
</table>

### Example: Part A – Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
</tbody>
</table>

**Description:** Review of IEPs in our school indicated that 30% of students’ IEPs include measurable post-school goals. So – we have limited implementation, but good quality data showing where we need to improve. However, our IEP forms were somewhat difficult to evaluate, because people were not consistent about where they put the information. Need to improve content of IEPs, quality of IEP planning; new form would help.
### A. Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
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<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
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</tr>
<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent of Evidence</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>4. Age-appropriate transition assessment information is (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
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<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
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<tr>
<td>Description:</td>
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<tr>
<td>Reflective Questions and Indicators</td>
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<tr>
<td><strong>Reflective Questions</strong></td>
<td></td>
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</tr>
<tr>
<td>▶ To what extent do students and their parents actively participate in the development of their individual education program (IEP)? What strategies are used to foster student and parent participation? How are students prepared to participate?</td>
<td></td>
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</tr>
<tr>
<td>▶ How is information regarding students’ interests, preferences, and needs used to identify postsecondary goals?</td>
<td></td>
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</tr>
<tr>
<td>▶ To what extent and how is transition-related assessment information (i.e., academic, cognitive, occupational, and/or adaptive behavior assessment information) used in developing annual goals and objectives and to determine related service needs?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▶ To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student’s educational program?</td>
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<tr>
<td>▶ To what extent do students’ educational programs include goals and objectives identified by the student?</td>
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<tr>
<td>▶ To what extent are the goals and objectives identified in students’ educational programs (including “transition services”) implemented and evaluated?</td>
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<tr>
<td>▶ What strategies are used to insure that agency personnel (with parent/guardian permission) and other appropriate individuals actively participate in planning meetings?</td>
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<tr>
<td>▶ To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered?</td>
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<tr>
<td>▶ What procedures are used to address discrepancies between services promised and services provided?</td>
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<thead>
<tr>
<th><strong>Suggested Indicators</strong></th>
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<tbody>
<tr>
<td>▶ # students whose present level of academic achievement and functional performance (PLAAFP) regarding transition goals and services are based on transition-related assessments</td>
</tr>
<tr>
<td>▶ # students with measurable post-school goals</td>
</tr>
<tr>
<td>▶ # IEP goals that are student-initiated</td>
</tr>
<tr>
<td>▶ # students with goal-related annual objectives and transition services</td>
</tr>
<tr>
<td>▶ # students attending their IEP meeting; level of student participation</td>
</tr>
<tr>
<td>▶ # students whose course of study aligns with post-school goals</td>
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<tr>
<th><strong>Notes and/or Ideas</strong></th>
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Part 1: Assessing Current Implementation of Student-Focused Planning and Student Development Practices
### B. Student Development Practices

<table>
<thead>
<tr>
<th>Practices</th>
<th>Extent Implemented</th>
<th>Extent/Quality of Evidence</th>
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<tbody>
<tr>
<td>1. Age-appropriate transition assessment information (e.g., academic, cognitive, career/occupational, adaptive behavior, etc.) is routinely collected.</td>
<td>DK 1</td>
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<td></td>
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<tr>
<td>2. Academic skill development</td>
<td>DK 1</td>
<td>2 3 4</td>
</tr>
<tr>
<td></td>
<td>Description:</td>
<td></td>
</tr>
<tr>
<td>3. Life skills development, including self-determination skills</td>
<td>DK 1</td>
<td>2 3 4</td>
</tr>
<tr>
<td></td>
<td>Description:</td>
<td></td>
</tr>
<tr>
<td>Practices</td>
<td>Extent Implemented</td>
<td>Extent of Evidence</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>4. Employment and occupational skills development, including paid work experience</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Identification and provision of support services that foster students’ skill development and achievement of post-school goals (e.g., environmental adaptations; accommodations; related services such as AT, OT; etc.)</td>
<td>DK 1 2 3 4</td>
<td>DK 1 2 3 4</td>
</tr>
<tr>
<td>Description:</td>
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</tbody>
</table>
## Sample Questions and Indicators

### Reflective Questions

- What transition-related assessment information is collected (i.e., academic, career/occupational, and/or adaptive behavior information)? When is it collected? By whom? How is it collected?
- How are target skills determined and subsequently evaluated? What do these assessments indicate regarding student learning/achievement of target skills?
- Do students’ educational programs align with their post-school goals?
- To what extent do all students participate in work-based education, including paid and/or unpaid work experiences, during high school?
- In which occupational areas are students employed during their work experiences?
- Are students’ work experiences aligned with their post-school goals?
- Are students’ work experiences aligned with their course of study?
- How are students informed of and recruited for co-curricula and extra-curricular activities?
- Do students have the skills they need to be successful, including: Academic skills? Independent living skills? Occupational skills? Employability and work behaviors? Self-determination skills?
- To what extent do students have the supports, accommodations, and/or related services they need to access work experiences?
- How are student accommodation needs identified?
- What methods are used to help students generalize their accommodation needs from school to community environments?

### Suggested Indicators

- # and % of students receiving services in specific settings
- Cognitive, academic, occupational, and adaptive behavior assessments used; student performance on assessments
- Specific strategies for student recruitment to co- and extracurricular activities
- # students participating in work-based, co-curricular, and extracurricular activities
- # and % of accommodation needs met and unmet
- % mastery of target skills

### Notes and/or Ideas:
Part 2: Identifying Strengths and Needs

(A) Student-Focused Planning Practices and (B) Student Development Practices

Use the information from Part 1—Assessing Current Implementation to summarize the current strengths of your transition-focused education and services. Building on the information regarding your strengths, identify specific transition education or service needs.

You may find that your needs include a range of activities. In some cases, you may determine that you need to change practice in your school or district, such as expanding the opportunities for students to participate in paid work experiences through the curriculum. In other cases, you may determine that to change practice requires a policy change at the school, district, or state level. For example, integrating opportunities for work experience in the curriculum may require a change in how staff funding can be used or in the assignment of personnel. In other cases, you might determine that a change in a form can improve planning or data collection, such as a change in the IEP form to facilitate addressing the IDEA transition requirements.

To help develop plans that address your needs, use the space provided to indicate the kind of action required to address each need you identify (practice, policy, or form) and then code your identified needs with respect to their priority and/or immediacy (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

Kinds of Actions:
- Practice
- Policy
- Form
- Other

<table>
<thead>
<tr>
<th>Priority:</th>
<th>Immediacy:</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Immediate</td>
</tr>
<tr>
<td>Low</td>
<td>Intermediate</td>
</tr>
<tr>
<td>Medium</td>
<td>Long-term</td>
</tr>
</tbody>
</table>

Example: Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>STUDENT-FOCUSED PLANNING PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>KIND OF ACTION</th>
<th>PRIORITY/ IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
<td>‣ IEP review indicated about 75% of students attended their IEP meeting ‣ Site review indicates some teachers integrating IEP planning and involvement strategies in their curricula</td>
<td>‣ Evaluations of the IEP meetings indicated many students were only passively involved in identifying their interests and preferences ‣ Greater implementation of evidence-based strategies to support student involvement is needed</td>
<td>Practice</td>
<td>High Immediate</td>
</tr>
</tbody>
</table>
### A. Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>STUDENT-FOCUSED PLANNING PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>KIND OF ACTION</th>
<th>PRIORITY/IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students’ IEPs include <em>measurable post-school goals</em> in (a) education and/or training, (b) employment, and (c) independent living.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. Students’ IEPs include <em>measurable annual goals</em> that will enable them to achieve their post-school goals.</td>
<td></td>
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</tr>
<tr>
<td>3. Students’ IEPs include coordinated transition activities and services (e.g., instruction, community experiences, etc.), including a course of study, that will enable them to achieve their post-school goals.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>STUDENT-FOCUSED PLANNING PRACTICES</td>
<td>CURRENT STRENGTHS</td>
<td>NEE DS</td>
<td>KIND OF ACTION</td>
<td>PRIORITY/IMMEDIACY</td>
</tr>
<tr>
<td>-------------------------------------</td>
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</tr>
<tr>
<td>4. Age-appropriate transition assessment information is (a) used to identify students’ preferences, interests, choices, and needs; (b) reflected in the summary of students’ present level of academic achievement and functional performance; and (c) used as the basis for the IEP.</td>
<td></td>
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</tr>
<tr>
<td>5. Students, families, educators, and relevant service providers (with parent/guardian permission) work together to plan and provide instruction and services.</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>6. Students are prepared to participate and do participate meaningfully in development of their IEP and in their IEP meeting.</td>
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</tr>
</tbody>
</table>
### B. Student Development Practices

<table>
<thead>
<tr>
<th>STUDENT-DEVELOPMENT PRACTICES</th>
<th>CURRENT STRENGTHS</th>
<th>NEEDS</th>
<th>KIND OF ACTION</th>
<th>PRIORITY/IMMEDIACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Age-appropriate transition assessment information (e.g., academic, cognitive, career/occupational, adaptive behavior, etc.) is routinely collected.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. Academic skill development</td>
<td></td>
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</tr>
<tr>
<td>3. Life skills development, including self-determination skills</td>
<td></td>
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</tr>
<tr>
<td>STUDENT-DEVELOPMENT PRACTICES</td>
<td>CURRENT STRENGTHS</td>
<td>NEEDS</td>
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<td>PRIORITY/ IMMEDIACY</td>
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<td>---------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>4. Employment and occupational skills development, including paid work experience</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Identification and provision of support services that foster students’ skill development and achievement of post-school goals (e.g., environmental adaptations; accommodations; related services such as AT, OT; etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part 3: Setting Goals and Planning

The purpose of this section is to help you make plans for the coming year. Use the responses from your Part 1—Assessing Current Implementation and Part 2—Identifying Strengths and Needs to identify specific goals that address your identified needs. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators that will determine whether the outcomes were achieved, and (d) data sources by which evidence will be collected. As a resource, use the checklist on the last page to help you clarify your goals, activities, outputs, and anticipated outcomes. If you need to include additional stakeholders in your plan and/or need technical assistance to implement your plan, indicate in the space provided.

Example:

<table>
<thead>
<tr>
<th><strong>STUDENT DEVELOPMENT PRACTICES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS:</strong> Employment and occupational skills development, including paid work experience</td>
</tr>
<tr>
<td><strong>GOAL:</strong> Increase # of students participating in work experience and/or work-based training</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>SPECIFIC GOAL-RELATED ACTIVITIES</strong></th>
<th><strong>PERSON RESPONSIBLE</strong></th>
<th><strong>TIMEFRAME</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify possible community liaisons to develop training sites</td>
<td>Ellen (education) with Lynn and Anna (job coaches/para-educators), Audrey R. (rehab), Julia (transition coordinator), and community members</td>
<td>1. Complete by December 31</td>
</tr>
<tr>
<td>2. Establish expected outcomes and expectations for students and community liaisons</td>
<td></td>
<td>2. Complete by December 31</td>
</tr>
<tr>
<td>3. Complete task analysis of work tasks for skill training in classrooms</td>
<td></td>
<td>3. Complete by January 20</td>
</tr>
<tr>
<td>4. Conduct student tours of potential training sites and “new employee orientation”</td>
<td></td>
<td>4. Complete by February 10</td>
</tr>
<tr>
<td>5. Identify key contacts (employers, job coaches, teachers)</td>
<td></td>
<td>5. Complete by February 28</td>
</tr>
<tr>
<td>6. Assess skills to determine readiness for sites</td>
<td></td>
<td>6. Complete by February 28</td>
</tr>
<tr>
<td>7. Place students at training sites</td>
<td></td>
<td>7. Complete by March 10</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OUTPUTS/PRODUCTS</strong></th>
<th><strong>EXPECTED OUTCOMES</strong></th>
<th><strong>POTENTIAL INDICATORS</strong></th>
<th><strong>DATA SOURCES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>· Task analyses for various job skills</td>
<td>· Increased student participation in work experiences</td>
<td>· # of students participating in work experiences</td>
<td>· Teacher records</td>
</tr>
<tr>
<td>· Creation guide (how to create training sites)</td>
<td>· Increased student employment</td>
<td>· # of students employed after training</td>
<td>· Job coach evaluations/records</td>
</tr>
<tr>
<td></td>
<td>· Increased life skills (budgeting)</td>
<td>· # of students opening banking accounts, purchasing</td>
<td>· Community member surveys</td>
</tr>
</tbody>
</table>
## Student-Focused Planning Practices

**Focus:**

<table>
<thead>
<tr>
<th>Specific Goal-Related Activities</th>
<th>Person Responsible</th>
<th>Timeframe</th>
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<table>
<thead>
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<th>Outputs/Products</th>
<th>Expected Outcomes</th>
<th>Potential Indicators</th>
<th>Data Sources</th>
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**Goal:**

Additional stakeholders and/or TA needs:
### Student-Focused Planning Practices

**Focus:**

**Goal:**

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**Additional stakeholders and/or TA needs:**
## Student-Focused Planning Practices

**Focus:**

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**Goal:**

**Potential Indicators** and **Data Sources**

Additional stakeholders and/or TA needs:
### Part 3: Setting Goals and Planning for Student-Focused Planning and Student Development Practices

<table>
<thead>
<tr>
<th>STUDENT-DEVELOPMENT PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS:</strong></td>
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<table>
<thead>
<tr>
<th><strong>GOAL:</strong></th>
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<table>
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<tr>
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Additional stakeholders and/or TA needs:
### Student-Development Practices

**Focus:**

**Goal:**

<table>
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Additional stakeholders and/or TA needs:
### STUDENT-DEVELOPMENT PRACTICES

#### FOCUS:

#### GOAL:

<table>
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</tbody>
</table>

**Additional stakeholders and/or TA needs:**
Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th>FOCUS AREA</th>
<th>CONSIDERATIONS AND CRITERIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>• Be specific.</td>
</tr>
<tr>
<td></td>
<td>• Identify what you are trying to accomplish.</td>
</tr>
<tr>
<td></td>
<td>• Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>• Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal within the scope of your control?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Is the goal realistic?</td>
</tr>
<tr>
<td>Activities</td>
<td>• Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Will the activity move you toward your goal?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity theoretically-based?</td>
</tr>
<tr>
<td></td>
<td>• Is the activity do-able with available resources?</td>
</tr>
<tr>
<td>Outputs</td>
<td>• Think in terms of “product” – something that will be produced?</td>
</tr>
<tr>
<td></td>
<td>• Is the “product” producible with the available resources?</td>
</tr>
<tr>
<td></td>
<td>• Will the outputs move you toward your goal?</td>
</tr>
<tr>
<td>Expected Outcomes</td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome an important aspect of your goal(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome specific?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome measurable?</td>
</tr>
<tr>
<td>Outcome Indicators</td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?)</td>
</tr>
<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator specific?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator measurable?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator meaningful?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator short or long-term (need both)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator possible with available resources?</td>
</tr>
<tr>
<td>Outcome Data Collection</td>
<td>• Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>• Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>• New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>• What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>• Must information be collected about all students?</td>
</tr>
<tr>
<td></td>
<td>• Can sampling methods be used?</td>
</tr>
<tr>
<td></td>
<td>• Who will collect the information?</td>
</tr>
<tr>
<td></td>
<td>• Do arrangements need to be made for data collection?</td>
</tr>
<tr>
<td></td>
<td>• Do data collection instruments need to be developed?</td>
</tr>
</tbody>
</table>
Team Meeting Details

New Mexico 2011
Oklahoma 2009
New Mexico 2008
Oklahoma 2008
<table>
<thead>
<tr>
<th>Team Meeting and Time</th>
<th>Tasks, Materials, and Flipcharts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meeting 1</strong></td>
<td><strong>Team Tasks</strong></td>
</tr>
<tr>
<td>Tuesday, June 13</td>
<td>• Introductions if needed</td>
</tr>
<tr>
<td>12:00 p.m. – 1:00 p.m.</td>
<td>• Review and/or establish ground rules</td>
</tr>
<tr>
<td></td>
<td>• Identify official recorder</td>
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<tr>
<td></td>
<td>• Identify content resource for next team meeting, if desired</td>
</tr>
<tr>
<td></td>
<td>• Select Tuesday afternoon content session “assignments”</td>
</tr>
<tr>
<td></td>
<td>• Begin team planning tool—Part 1: ID current implementation</td>
</tr>
<tr>
<td><strong>Facilitator Roles</strong></td>
<td><strong>Materials – Each Team</strong></td>
</tr>
<tr>
<td></td>
<td>• Facilitate team organization (space, materials, etc.)</td>
</tr>
<tr>
<td></td>
<td>• Keep time</td>
</tr>
<tr>
<td></td>
<td>• Facilitate progress and process</td>
</tr>
<tr>
<td></td>
<td>• Help problem solve</td>
</tr>
<tr>
<td></td>
<td>• Identify and help overcome roadblocks</td>
</tr>
<tr>
<td></td>
<td>• Prepare content resource request for next meeting—Tuesday afternoon</td>
</tr>
<tr>
<td></td>
<td>• Help team choose next content session “assignments”</td>
</tr>
<tr>
<td></td>
<td><strong>Use Flipcharts</strong></td>
</tr>
<tr>
<td></td>
<td>• Welcome to 2011 NM Summer Institute – Transition Strand</td>
</tr>
<tr>
<td></td>
<td>• Agenda for team meeting (team tasks)</td>
</tr>
<tr>
<td></td>
<td>• Ground rules</td>
</tr>
<tr>
<td></td>
<td>• Definition of consensus</td>
</tr>
<tr>
<td></td>
<td>• Parking lot</td>
</tr>
<tr>
<td></td>
<td>• Note key points of discussions</td>
</tr>
</tbody>
</table>

**Hotel Albuquerque, Albuquerque, NM**

Facilitator Roles and Team Meeting Details
June 13 - 16, 2011
### Meeting 2
**Tuesday, June 14**
**2:30 p.m. – 4:30 p.m.**

**Facilitator Roles**
- Facilitate team organization (space, materials, etc.)
- Keep time
- Keep content resource moving on schedule
- Facilitate progress and process
- Help problem solve
- Identify and help overcome roadblocks
- Prepare content resource request for next meeting—Wednesday afternoon
- At end of session, ID what worked and what didn’t (bring to facilitator de-brief)

**Team Tasks**
- Discussion with content resource if scheduled
- Briefly review information from content sessions
- Continue team planning tool—Part 1: ID current implementation (move to Part 2: Strengths and Needs when ready)
- Select Wednesday a.m. and p.m. content session “assignments”
- Identify content resource for next team meeting, if desired
- Identify what worked and what didn’t

**Materials – Each Team**
- Team flash drive
- Team schedule for content resource appointments
- Team Planning Tool – Sections A and B
- Program with content session descriptions
- List of content resources
- Content Resource Request form (blue)
- Sheet for recording what worked and what didn’t

**Use Flipcharts**
- Display agenda, ground rules, definition of consensus, parking lot
- Add additional notes and key points of discussions
- Note questions for content resources
- ID what worked and what didn’t if not using recording sheet

### Meeting 3
**Wednesday, June 15**
**2:30 p.m. – 4:30 p.m.**

**Facilitator Roles**
- Facilitate team organization (space, materials, etc.)
- Keep time
- Keep content resource(s) moving on schedule
- Facilitate progress and process
- Help problem solve
- Identify and help overcome roadblocks
- Prepare content resource request for final meeting—Thursday morning
- At end of session, ID what worked and what didn’t (bring to facilitator de-brief)

**Tasks**
- Discussion with content resource if scheduled
- Briefly review information from content sessions
- Continue team planning tool—Parts 1 and 2 (move to Part 3 when ready)
- Identify content resource(s) for next team meeting, if desired
- Identify what worked and what didn’t

**Materials – Each Team**
- Team flash drive
- Team schedule for content resource appointment
- Team Planning Tool – Sections A and B
- Content Resource Request form (lavender)
- List of content resources
- Sheet for recording what worked and what didn’t

**Use Flipcharts**
- Display agenda, ground rules, definition of consensus, parking lot
- Add additional notes and key points of discussions
- Note questions for content resources
- ID what worked and what didn’t if not using recording sheet
| Meeting 4  
Thursday, June 16  
8:45 a.m. – 10:45 a.m. |
| --- |
| **Facilitator Roles**  
- Facilitate team organization (space, materials, etc.)  
- Keep time  
- Keep content resource(s) moving  
- Facilitate completion of plan  
- Turn in official copy of Section B (team information and parts 1 – 3 worksheets)  
- Help team develop summary for reporting out  
- Remind team members to complete institute and strand evaluations |
| **Tasks**  
- Discussion with content resource if scheduled  
- Continue Team Planning Tool—Complete Part 3: Planning  
- Prepare "official" copy of tool (electronic or paper) – Section B Parts 1 – 3 worksheets  
- Develop brief summary on flip charts for reporting out – feel free to be creative!  
- Complete institute and strand evaluations |
| **Materials – Each Team**  
- Team flash drive  
- Team schedule for content resource appointments  
- Team Planning Tool – Sections A and B  
- Institute evaluation  
- Strand evaluation  
- Flip chart page(s) for report out |
| **Use Flipcharts**  
- Display agenda, ground rules, parking lot, definition of consensus  
- Add additional notes and key points of discussions  
- Summary of plan for report out |
# Facilitator Roles and Team Meeting Details

<table>
<thead>
<tr>
<th>Team Meeting and Time</th>
<th>Tasks, Materials, and Flipcharts</th>
</tr>
</thead>
</table>
| **Meeting 1**  
Thursday, September 10  
9:30AM – 11:45 AM  
(working lunch) | **Team Tasks**  
- Introductions if needed  
- Review and/or establish ground rules  
- Establish what part of tool team is working on (Part 1 or Part 3)  
- Identify official recorder  
- Begin team planning tool—Part 1: ID current implementation or Part 3: Planning (review Parts 1 and 2)  
- Identify content resource for next team meeting, if desired  
- Select Thursday afternoon breakout session “assignments”  

**Materials – Each Team**  
- Team Planning Tool  
- Program with content session descriptions  
- List of content resource availability  
- Content Resource Request form (green)  

**Use Flipcharts**  
- Agenda for team meeting (team tasks)  
- Ground rules  
- Definition of consensus  
- Parking lot  
- Note key points of discussions |
| **Facilitator Roles**  
- Facilitate team organization (space, materials, etc.)  
- Keep time  
- Facilitate progress and process  
- Help problem solve  
- Identify and help overcome roadblocks  
- Prepare content resource request for next meeting—Thursday afternoon  
- Help team choose next breakout session “assignments” (2 rounds of sessions)  

| **Meeting 2**  
Thursday, September 10  
2:30 PM – 4:00 PM | **Team Tasks**  
- Discussion with content resource if scheduled  
- Briefly review information from content sessions  
- Continue team planning tool—Part 1: ID current implementation (move to Part 2: Strengths and Needs when ready) or Part 3: Planning  
- Select Friday morning content session “assignments”  
- Identify content resource(s) for next team meeting, if desired  
- Identify what worked and what didn’t  

**Materials – Each Team**  
- Team schedule for content resource appointments  
- Team Planning Tool  
- Program with content session descriptions  
- List of content resource availability  
- Content Resource Request form (blue)  
- Sheet for recording what worked and what didn’t  

**Use Flipcharts**  
- Display agenda, ground rules, definition of consensus, parking lot  
- Add additional notes and key points of discussions  
- Note questions for content resources |
| **Facilitator Roles**  
- Facilitate team organization (space, materials, etc.)  
- Keep time  
- Keep content resource moving on schedule  
- Facilitate progress and process  
- Help problem solve  
- Identify and help overcome roadblocks  
- Prepare content resource request for next meeting—Friday morning  
- At end of session, ID what worked and what didn’t (bring to facilitator de-brief)  

- Introductions if needed  
- Review and/or establish ground rules  
- Establish what part of tool team is working on (Part 1 or Part 3)  
- Identify official recorder  
- Begin team planning tool—Part 1: ID current implementation or Part 3: Planning (review Parts 1 and 2)  
- Identify content resource for next team meeting, if desired  
- Select Thursday afternoon breakout session “assignments”  

- Team Planning Tool  
- Program with content session descriptions  
- List of content resource availability  
- Content Resource Request form (green)  

- Agenda for team meeting (team tasks)  
- Ground rules  
- Definition of consensus  
- Parking lot  
- Note key points of discussions |
### Meeting 3
**Friday, September 11**
**10:15 AM – 12:15 PM**

**Facilitator Roles**
- Facilitate team organization (space, materials, etc.)
- Keep time
- Keep content resource(s) moving on schedule
- Facilitate progress and process
- Help problem solve
- Identify and help overcome roadblocks

**Tasks**
- Discussion with content resource(s) if scheduled
- Briefly review information from content sessions
- Continue team planning tool—Parts 1 and 2 (move to Part 3 when ready) or Part 3: Planning

**Materials – Each Team**
- Team schedule for content resource appointments
- Team Planning Tool

**Use Flipcharts**
- Display agenda, ground rules, parking lot, definition of consensus
- Add additional notes and key points of discussions
- Questions for content resource(s)

---

### Meeting 4
**Friday, September 11**
**1:15 PM – 2:45 PM**

**Facilitator Roles**
- Facilitate team organization (space, materials, etc.)
- Keep time
- Facilitate completion of plan
- Turn in official copy of Team Planning Tool (team info and parts 1 – 3)
- Remind team members to complete evaluation

**Tasks**
- Continue Team Planning Tool—Complete Part 3: Planning
- Prepare “official” copy of tool (electronic or paper) – Sections 1, 2, 3, and team information from Team Planning Tool
- Complete institute evaluation

**Materials – Each Team**
- Team Planning Tool
- Institute evaluation

**Use Flipcharts**
- Display agenda, ground rules, parking lot, definition of consensus
- Add additional notes and key points of discussions

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Facilitator preparation is a resource provided by the
National Secondary Transition Technical Assistance Center
## New Mexico 2008 Summer Transition Institute

### Facilitator Roles and Team Meeting Details

<table>
<thead>
<tr>
<th>Team Meeting and Time</th>
<th>Tasks, Materials, and Flipcharts</th>
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</table>
| **Meeting 1**  
Monday, June 9  
10:30 AM – 12:50 PM  
**Facilitator Roles**  
- Facilitate team organization  
  (space, materials, etc.)  
- Keep time  
- Facilitate progress and  
  process  
- Help problem solve  
- Identify and help overcome  
  roadblocks  
- Prepare content resource  
  request *for next meeting*—  
  Monday afternoon  
- Help team choose next  
  breakout session  
  “assignments”  
| **Team Tasks**  
- Introductions if needed  
- Review and/or establish ground rules  
- Identify official recorder  
- Begin team planning tool—Part 1: ID current implementation  
- Identify content resource(s) for next team meeting, if desired  
- Select Monday afternoon content session “assignments”  
| **Materials – Each Team**  
- Team Planning Tool  
- Program with content session descriptions  
- List of content resources  
- Content Resource Request form (green)  
| **Use Flipcharts**  
- Agenda for team meeting (team tasks)  
- Ground rules  
- Definition of consensus  
- Parking lot  
- Note key points of discussions  

| **Meeting 2**  
Monday, June 9  
2:30 PM – 4:20 PM  
**Facilitator Roles**  
- Facilitate team organization  
  (space, materials, etc.)  
- Keep time  
- Keep content resource(s)  
  moving on schedule  
- Facilitate progress and  
  process  
- Help problem solve  
- Identify and help overcome  
  roadblocks  
- Prepare content resource  
  request *for next meeting*—  
  Tuesday morning  
- At end of session, ID what  
  worked and what didn’t (bring  
  to facilitator de-brief)  
| **Team Tasks**  
- Discussion with content resource(s) if scheduled  
- Briefly review information from content sessions  
- Continue team planning tool—Part 1: ID current implementation  
  (move to Part 2: Strengths and Needs when ready)  
- Select Tuesday morning content session “assignments”  
- Identify content resource(s) for next team meeting, if desired  
- Identify what worked and what didn’t  
| **Materials – Each Team**  
- Team schedule for content resource appointments  
- Team Planning Tool  
- Program with content session descriptions  
- List of content resources  
- Content Resource Request form (blue)  
- Sheet for recording what worked and what didn’t  
| **Use Flipcharts**  
- Display agenda, ground rules, definition of consensus, parking lot  
- Add additional notes and key points of discussions  
- Note questions for content resources  |
| Meeting 3  
| Tuesday, June 10  
| 10:45 AM – 12:00 noon (plus lunch if desired)  
| Facilitator Roles  
| - Facilitate team organization (space, materials, etc.)  
| - Keep time  
| - Keep content resource(s) moving on schedule  
| - Facilitate progress and process  
| - Help problem solve  
| - Identify and help overcome roadblocks  
| - Prepare content resource request for next meeting—Tuesday afternoon  
| Tasks  
| - Discussion with content resource(s) if scheduled  
| - Briefly review information from content sessions  
| - Continue team planning tool—Parts 1 and 2 (move to Part 2 when ready)  
| - Select Tuesday afternoon content session “assignments”  
| - Identify content resource(s) for next team meeting, if desired  
| Materials – Each Team  
| - Team schedule for content resource appointments  
| - Team Planning Tool  
| - Program with content session descriptions  
| - List of content resources  
| - Content Resource Request form (lavender)  
| Use Flipcharts  
| - Display agenda, ground rules, parking lot, definition of consensus  
| - Add additional notes and key points of discussions  
| - Note questions for content resources  

| Meeting 4  
| Tuesday, June 10  
| 2:30 PM – 4:15 PM  
| Facilitator Roles  
| - Facilitate team organization (space, materials, etc.)  
| - Keep time  
| - Keep content resource(s) moving on schedule  
| - Facilitate progress and process  
| - Help problem solve  
| - Identify and help overcome roadblocks  
| - Prepare content resource request for final meeting—Wednesday morning  
| - At end of session, ID what worked and what didn’t (bring to facilitator de-brief)  
| Tasks  
| - Discussion with content resource(s) if scheduled  
| - Briefly review information from content sessions  
| - Continue team planning tool—Parts 1, 2, and 3  
| - Identify content resource(s) for final team meeting, if desired  
| - Identify what worked and what didn’t  
| Materials – Each Team  
| - Team schedule for content resource appointments  
| - Team Planning Tool  
| - List of content resources  
| - Content Resource Request form (yellow)  
| - Sheet for recording what worked and what didn’t  
| Use Flipcharts  
| - Display agenda, ground rules, parking lot, definition of consensus  
| - Add additional notes and key points of discussions  
| - Note questions for content resources |
Meeting 5  
Wednesday, June 11  
8:15 AM – 9:45 AM

Facilitator Roles
- Facilitate team organization (space, materials, etc.)
- Keep time
- Keep content resource(s) moving
- Facilitate completion of plan
- Turn in official copy of Team Planning Tool (team info and parts 1 – 3)
- Help team develop summary for reporting out
- Remind team members to complete evaluation

Tasks
- Discussion with content resource(s) if scheduled
- Continue Team Planning Tool—Complete Part 3: Planning
- Prepare “official” copy of tool (electronic or paper) – Sections 1, 2, 3, and team information from Team Planning Tool
- Develop brief summary on flip charts for reporting out – feel free to be creative!
- Complete institute evaluation

Materials – Each Team
- Team schedule for content resource appointments
- Team Planning Tool
- Institute evaluation
- Flip chart page(s) for report out

Use Flipcharts
- Display agenda, ground rules, parking lot, definition of consensus
- Add additional notes and key points of discussions
- Summary of plan for report out
### Team Meeting and Time

**Meeting 1**  
**Thursday, September 4**  
**10:45 AM – 12:45 PM**

**Facilitator Roles**
- Facilitate team organization
  (space, materials, etc.)
- Keep time
- Facilitate progress and process
- Help problem solve
- Identify and help overcome roadblocks
- Prepare content resource request *for next meeting—Thursday afternoon*
- Help team choose next breakout session “assignments”

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<td>· Identify content resource(s) for next team meeting, if desired</td>
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<td>· Parking lot</td>
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<td>· Note key points of discussions</td>
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</tbody>
</table>

**Meeting 2**  
**Thursday, September 4**  
**3:30 PM – 5:00 PM**

**Facilitator Roles**
- Facilitate team organization
  (space, materials, etc.)
- Keep time
- Keep content resource(s) moving on schedule
- Facilitate progress and process
- Help problem solve
- Identify and help overcome roadblocks
- Prepare content resource request *for next meeting—Friday morning*
- At end of session, ID what worked and what didn’t (bring to facilitator de-brief)

<table>
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<td>· Note questions for content resources</td>
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<tr>
<td>Meeting 3</td>
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<tr>
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<tr>
<td>Friday, September 5</td>
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<tr>
<td>11:15 AM – 12:15 PM</td>
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<tr>
<td>(plus lunch if desired)</td>
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<tr>
<th>Meeting 4</th>
<th>Tasks</th>
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<tbody>
<tr>
<td>Friday, September 5</td>
<td>Continue Team Planning Tool—Complete Part 3: Planning</td>
</tr>
<tr>
<td>1:15 PM – 2:45 PM</td>
<td>Prepare “official” copy of tool (electronic or paper) – Sections 1, 2, 3, and team information from Team Planning Tool</td>
</tr>
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<td><strong>Facilitator Roles</strong></td>
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</tr>
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<td>• Complete institute evaluation</td>
<td></td>
</tr>
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</table>

| **Materials – Each Team** | |
| • Team Planning Tool | |
| • Institute evaluation | |
| • Flip chart page(s) for report out | |

| **Use Flipcharts** | |
| • Display agenda, ground rules, parking lot, definition of consensus | |
| • Add additional notes and key points of discussions | |
| • Summary of plan for report out | |
Facilitator Preparation Materials

Materials Included in Facilitator Preparation Folders

Facilitator Preparation Manual

Oklahoma 2009 Materials

- Facilitator preparation agenda
- Facilitator preparation slides
- “What Worked and What Didn’t” form
- Facilitator folder labels
Materials Included in Facilitator Preparation Folders

☐ Facilitator preparation agenda
☐ Facilitator preparation evaluation
☐ Facilitator roles and team meeting details
☐ Facilitator/team assignment list
☐ Team planning tool
☐ Content resource availability list
☐ Content resource request forms for each meeting
☐ What worked and what didn’t form for each facilitator debrief
☐ Facilitator Preparation Manual if not provided in advance
This document was produced under U.S. Department of Education, Office of Special Education Programs Grant No. #H326J050004. Dr. Marlene Simon-Burroughs served as the project officer. The views expressed herein do not necessarily represent the positions or polices of the Department of Education. No official endorsement by the U.S. Department of Education of any product, commodity, service, or enterprise mentioned in this publication is intended or should be inferred. This product is public domain. Authorization to reproduce it in whole or in part is granted. While permission to reprint this publication is not necessary, the citation should be:


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10 9 8 7 6 5 4 3 2
Acknowledgments

This Facilitator Preparation Manual is adapted from How to Facilitate Groups, published by the National School-to-Work Opportunities Team in the mid-nineties. We acknowledge that we used much of the STW team’s text, and then enhanced the examples and procedures to align with NSTTAC’s transition institute model. We thank them for this earlier work and their insights into the group process. Having used the original guide for the past 15 years, we determined that an updated version, aligned with NSTTAC’s work to build state capacity to improve secondary education and transition services for students with disabilities, would further improve our facilitator preparation and group strategic planning process.

In addition, we acknowledge the many facilitators with whom we have worked during our national and state transition institutes for their input and suggestions to improve the facilitation experience. In particular, we acknowledge our colleagues at the following organizations for their collaboration:

NSTTAC team at the University of North Carolina at Charlotte
National Post-School Outcomes Center, University of Oregon
National Dropout Prevention Center for Students with Disabilities, Clemson University
New Mexico State Transition Team
Arkansas State Transition Team
Colorado State Transition Team
Oklahoma Transition Council

Finally, we acknowledge Allie Rowe for her desktop publishing expertise necessary to bring this product to publication.

Paula D. Kohler, Ph.D.
NSTTAC Co-Investigator
Introduction:

Purpose of Manual

This manual is designed to help prepare facilitators for their role in NSTTAC’s transition institute model, focused on improving transition education, services, and outcomes of students with disabilities. In this model, more fully described in the NSTTAC Transition Institute Toolkit, the facilitator plays a key role in leading strategic planning sessions for state and/or local teams.

In the following pages, we describe general characteristics of team work sessions, strategies for preparing for and leading work sessions, and approaches for solving problems and achieving consensus. Specifically, this manual is intended to assist facilitators with the following:

- Understand NSTTAC’s transition institute model and strategic planning process
- Understand their role as a facilitator within the model
- Design and prepare for work sessions
- Strengthen facilitation skills, including:
  - Opening work sessions
  - Leading group discussions
  - Setting up and working with small groups
  - Using flipcharts
  - Helping groups reach consensus
  - Resolving conflict
- Evaluate work sessions

The Facilitator’s Role

The active facilitation approach sees the role of the facilitator as a temporary group or team leader. This leadership role has a very significant impact on group effectiveness, despite the fact that the facilitator does not get involved in the content of the group’s work. The facilitator employing the active facilitation approach enables the group to focus its work on the task at hand know-
ing an unbiased professional is providing the structure, processes, and the push—this is probably the most distinguishing characteristic of the approach—to help the group get where it is trying to go.

The facilitator in the active facilitation approach has a strong attachment to the group and its task. Unlike conventional facilitation approaches, in this approach, the facilitator shares responsibility with the group for getting their task accomplished. The roles and responsibilities of the facilitator can be summarized in three primary areas.

**Neutral Servant of the Group.** As in all group facilitation, the facilitator in the active facilitation approach has an unbiased service role. He or she is bound to be neutral, that is, to treat all participants and all ideas in the group with the same respect. The facilitator has no interest in what decision is made, but has a strong interest in a decision being made; no preference for one outcome over another, but a strong preference that an outcome be reached; no preference that one group member or another being heard, but a clear interest in all participants having a chance to be heard.

**Process Advocate.** The facilitator proposes processes for helping the group get its work done, invites ideas for process alternatives from group members, and ensures that the agreed-upon process is used so long as it is working. The responsibility of the facilitator is not to advocate one particular process, but to advocate whatever process the group has agreed to use. In this way, the facilitator helps the group stay on a productive course.

**Progress Advocate.** The facilitator is responsible for helping the group establish and maintain forward movement. It is this push factor that frequently earns the facilitator using the active facilitation approach the undying appreciation of groups. As progress advocate, the facilitator is continually assessing the group’s progress toward its objectives and managing both group and task processes.
What the Facilitator Does In the Active Facilitation Approach

Compared to conventional facilitation methods, the facilitator in the active facilitation approach has a more extensive role in planning for, facilitating, and following up on a work session.

Before The Meeting

Learn about the purpose and objectives for the meeting. The facilitator meets with the meeting initiator(s) to find out what the meeting is expected to accomplish. The format of these meetings can vary and can be conducted effectively via webinar, teleconference, and/or in person.

Develop an understanding of the issues impacting the meeting. Through such means as review of related materials or pre-meetings with a planning team the facilitator becomes knowledgeable about issues affecting the group and the meeting. In meetings of significant duration and complexity, the facilitator often presents what he or she has learned to the group at the beginning of the meeting to check for accuracy and to be sure the right issues are before the group. Especially important is the role of the facilitator in putting issues before the group that members may be reluctant to bring up themselves in the group setting.

During The Meeting

Facilitate the group. This broad category of activities includes the following:

- Manage the agenda and progress of the group;
- Adjust time, tasks, and processes
- Give the group feedback on progress
- Encourage the group
- Keep the meeting objectives before the group
- Ensure that all participants and ideas have a chance to be heard.
- Help the group reach consensus and make decisions in other ways.
- Help the group resolve differences.
• Track ancillary issues (issues raised at a time when the group can't productively deal with them).
• Track follow up or action items.

**Help the group plan for follow up.** Ensure that next steps, who's responsible for doing what, and due dates for follow up are clearly established before the meeting ends.

**Help the group evaluate the meeting.** Ensure that participants complete the institute’s (or other group meeting’s) evaluation. Also gather information about “what worked” and “what didn’t”, covering both task and process aspects of the institute.

**After The Meeting**

**Report Out.** Facilitators will be involved in a brief report-out session at the end of each day of the institute. This session will involve all facilitators and include sharing feedback from their team regarding “What worked” and “What didn’t”, which institute planners will use to improve the next day’s sessions.
Section 1: Work Session Format

The amount of time and effort that goes into the institute’s design varies according to the duration, complexity, and size of the institute. The time invested in careful institute design has a high payoff: an agenda which enables participants to achieve their objectives, appreciate the outcomes of the institute, and often, actually enjoy the experience. Prior to the institute, the work sessions have already been designed and organized as part of the team meeting agenda. The facilitator does not design the work session, but instead, becomes important in its function.

Before facilitating a work session, it is important to understand what makes team meetings work. The most important considerations are the needs and interests of the team participants, the facilitator’s key customers once the institute is underway. For team meetings to be most effective, participants need to have:

- A clear understanding of the objectives and intended outcomes
- A clear understanding of the processes to be used and confidence in the facilitator who will manage the processes
- A clear understanding of the role of everyone in the room (including themselves)
- Confidence in the utility of the meeting; belief the goal is reachable
- The opportunity to participate substantively
- The opportunity to have input to process changes
- Confidence that follow-up will occur and be managed

Virtually everything a facilitator does in preparing for a meeting is intended to address one or more of these customer standards.

A number of steps are involved in facilitating a team meeting.
Step 1: Learn client objectives.

From meetings with the initiator, the planning team, some or all of the participants, or from other sources such as a survey of participants or review of written materials. This could include documents created by the team prior to the meeting, such as the previous year’s team planning tools.

Step 2: Gather basic information about the team and its participants.

Find out how many people are expected to participate on the team(s) you will facilitate, who they are, how much time is available for the meetings, and when and where they will be held.

Step 3: Learn about issues impacting the meeting.

Again, in meetings with the initiator, the planning team, some or all of the participants, or from other sources, focus on such issues as:

- The history of the issue and/or the group.
- Relationships within the group or between the group and others.
- Feelings within the group about the task or the group.

Step 4: Consider the complexity of the meeting(s).

Determining the complexity of the institute and the meetings within it is essential for understanding the facilitation requirements and involves analysis of the following considerations:

- Length of the institute—the longer an institute lasts, the more complex the facilitation challenge can be.
- Nature of relationships among the participants—if, for example, participants have a history with one another that is characterized by personality differences or difficulty reaching agreement, the facilitation requirements for a meeting of the group are greater. If participants know each other and
do not have a history of difficulties, the facilitation task is not so complex. The same is true if participants have no past experience with one another; the facilitation challenge is not as complex as for a group with problems in its past.

**Step 5: Review institute materials.**

It is important that you become familiar with the materials that will be presented or discussed at the institute, such as the team planning tool and institute agenda. These materials could also include any number of documents contained within the NSTTAC Evaluation Toolkit or team specific materials.

**Step 6: Develop a draft agenda for each session.**

The NSTTAC institute model typically includes a very specific agenda for each team meeting, which includes opportunities to discuss content, meet with content resources, generate and analyze information, and provide feedback. Remember, as you prepare to implement the agenda, there may be unique considerations regarding any particular meeting. Be sure to incorporate as many of the following considerations as apply:

- **Maximize interaction, this is paramount.**
- **Put issues and tasks in logical order,** the first consideration in ordering topics.
- **Consider the nature and difficulty of the tasks or processes:**
  - Schedule less interactive segments early in the day, when people can listen with greater efficiency
  - Set and enforce short time frames for certain meeting elements, for example, presentations of information
- **Remember that interactive processes take longer, so allow enough time:**
  - It takes time to discuss and time to agree
  - Small group processes must always include time for reports from small groups about what was discussed
Section 2: Opening a Work Session

Team meetings often open with welcoming and other introductory comments by the facilitator, who also generally assumes the role of meeting leader and in various ways proceeds to guide the group through its agenda and its various tasks to its desired outcomes.

The facilitator’s goal in opening a group session is to begin the process of creating an environment in which participants:

- Know what to expect and what is expected of them
- Believe the work session is a good investment of their time and energy
- Develop trust in the facilitator and the other participants
- Have confidence that a product will result from their work

The facilitator begins addressing these prerequisites to active participation at the very beginning of the work session using the following techniques.

Welcoming Participants

Your first words to participants give you a chance to set a positive tone and begin to demonstrate how you will conduct yourself. It’s best to be yourself, a difficult goal when you may be a bit nervous about the task ahead of you. Speak informally, in a friendly tone, and in the same way you would speak to colleagues, for example:

"Good morning, everyone. My name is Rebecca Carson, and I’m going to be your facilitator this week. We are ready to begin the first planning session, so I’d like to start by saying ‘welcome' to you all."
**Introduce Yourself**

If you are certain that everyone in the room knows you, then, of course, introducing yourself is not necessary. But, if there is anyone in the room who does not know you, or does not know you well, it’s a good idea to introduce yourself so no one is reluctant to call you by name.

When you introduce yourself, do it before you begin participant introductions. Give your name again, write it on a flip chart, and post the flipchart on the wall. If you are unknown to anyone in the room, explain in two or three sentences your qualifications to be facilitating this meeting, especially your experience in this organization or similar ones and your experience doing this kind of facilitation.

**Have Participants Introduce Themselves**

If all participants know each other well, then participant introductions are not necessary. If you’re not sure how well they know each other, ask one or two of the participants before the meeting begins. If participant introductions are needed, it is important to understand the following information, in order to allow the appropriate time for introductions;

- How well participants know one another.
- How well participants need to get to know each other, for example, is this the first meeting of a team that needs to develop close relationships? Is this a group of people with adversarial views who need to develop enough personal rapport to be able to work collaboratively? Or, is this a group who will meet just once, with a light task?
- How much time participants will be spending together; longer meetings generally have more in-depth interactions and require participants to know each other better from the start.
- How much time is available for introductions?

Once the above considerations have been addressed, each person should briefly introduce themselves to the whole group. This method takes about 15 minutes to instruct and carry out the interviewing step plus about three minutes
per participant for the introductions. If each interviewer is asked to create a
flipchart about his or her partner, add another few minutes per participant to
your calculations.

**Introduce a Work Session**

Since there is important information to be conveyed about the work session at
the beginning, it is helpful to have the key points you want to make on a se-
ries of flipcharts. There is flexibility regarding the order in which you present
this information and the particular information you cover, but, at a minimum,
do the following:

**Review the meeting schedule.** Become familiar with the institute’s
agenda so that you know when and where your team meetings will occur.
The “team tasks” and meeting schedule will be provided to you prior to the
institute’s beginning. This information will help you prepare meeting materials
in advance (e.g., flipcharts with meeting agenda, content resource schedule,
etc.) so that valuable time is not wasted at the beginning of the team meeting.
Be sure to indicate that lunch and stretch breaks will be taken each day, how
long each will be, and about when they will occur.

**Explain the purpose of the meeting.** That is, explain the outcomes ex-
pected for the institute and the specific tasks for each team meeting, for exam-
ple:

"Develop the groundwork for a strategic plan to guide the team's
work over the coming year," or

"Share information about current activities among the various group
members' organizations"

**Present the objectives for the meeting.** Describe specifically what par-
ticipants are expected to accomplish, in three or four statements, for example:

“To assess where things currently stand in each key program area.”
“To develop broad strategies for moving the program forward over the coming year.”

“To create a plan for continuing the planning process after the meeting is over and everyone is back at work.”

**Explain the meeting and facilitation approach.** Describe what participants can expect to happen in the meeting, for example,

“This meeting will have plenary sessions each day in which information and ideas will be presented to the whole group. There will also be daily concurrent breakout sessions in which more specific information will be presented and discussed. Also each day, there will be planning sessions during which each team meets with its facilitator to work through the planning process using information gained in the content sessions.”

“I will be helping you with your work in the team meeting sessions. I will open the team meetings, help you stay on track with the planning guidance we’ve been given, record your ideas and decisions on flipcharts, and generally try to ensure that everyone has a chance to be heard and that agreement is reached on key points before you move forward. I’ll also keep track of the time and be sure our planning sessions end when you have agreed they should end. If anyone has any ideas for other ways I could help or ideas for how the process should work along the way, please do not hesitate to offer me suggestions.”

**Review the agenda.** Use your team meeting materials to describe each meeting’s agenda. Since agendas have to be somewhat flexible, make the following points:

“I may not stop an interesting discussion to take a stretch break precisely on schedule, but if I wait too long, just let me know. Also, the agenda times may change if a topic requires more or less time than originally estimated. I will, however, be sure we break for lunch on time and open and close the meeting on time.”
**Review administrative information.** Explain how meals will be handled, where bathrooms are located, any after-hours events that have been planned, any paperwork requirements of participants, etc.

**Establish Ground Rules**

Ground rules in meetings serve as an informal contract that lays out how things will work and how people will act in the meeting. They are presented after expectations have been gathered. Two kinds of ground rules typically appear on facilitators’ lists and include the following examples.

**Process ground rules:**

- Make decisions by consensus.
- Post decisions on a flipchart.
- Track follow-up or action items as we go.

**Behavioral ground rules:**

- Attend all sessions and be on time.
- Treat all ideas with respect.
- Raise differences openly and constructively.

The two kinds of ground rules do not need to be separated when presented to participants; both behavioral and process ground rules are often intermingled on the same list. If the group is experienced with the group process, you might ask the participants to generate a list of ground rules themselves, after you have given them the introductory information (purpose, objectives, meeting approach, agenda).
Section 3: Leading Group Discussions

Discussions can be a creative and productive way to develop a shared understanding of a subject within a group and to explore a subject in some depth. Discussions are a critical precursor to a group developing a consensus decision where that is a goal. The reasons for having group discussions in a meeting are several:

- Help participants get interested and involved in a subject.
- Enable participants to fill in information gaps and to clear up misunderstandings.
- Enable participants to review and analyze subject matter that has been presented to the group verbally or in writing.
- Identify areas of agreement and disagreement in the group so that differences can be understood and resolved.

Prepare for a Group Discussion

Think through your objectives for the group discussion in advance of the session, and decide the key outcomes you would like to see the discussion produce. These are generally outlined in the facilitators’ team meeting task document provided during facilitator preparation. With your objectives in mind, develop and write down two or three open-ended questions to help start and guide the discussion. Plan to begin with a very general, open-ended question (one that cannot be answered by, "yes", or, "no"), and follow with more targeted open-ended questions. An example for a planning session follows:

First ask: "What do you think of this approach?"
Then ask: "What do you consider the most valuable aspects of it?"
"What are the most challenging?"
Then ask: "If the team were to recommend this approach, how do you think local program people can be convinced of its utility?"
Starting a Group Discussion

Introduce the discussion topic and objective(s), and pose the first, general, open-ended question. Wait for the first response and be patient. Try counting to 15 silently. It often takes time for the first person to organize a thought and decide to express it. If no one comments, try the question in a new way.

"Any thoughts on the idea to provide state teams with training on transition assessment? Anything you want clarified?", or

"Anything you particularly like about this proposal? Don't like about it?"

Once the first person speaks up, others will generally follow without delay. When comments begin, treat each one with respect. To speak up in a group session involves at least a little bit of risk for participants. If they feel you may dismiss or criticize their comments, they may prefer not to speak up at all.

Encourage Continued Discussion

The first rule for facilitators is to listen carefully to each comment. Restate or paraphrase comments from time to time to show participants that you are listening and subtly reaffirm the value of participants' points. It is very important that the facilitator not evaluate comments either positively or negatively; rather you should acknowledge them supportively, but neutrally. Definitely DO NOT criticize participants or cast their comments in a negative light.

Do say: "I see what you are saying— it will take a lot of resources."

or "So, you found that the last training from that contractor was very valuable."

Don't say: "That doesn't sound like a very fair evaluation of the Commissioner's comments." or "You're probably the only person who would look at this subject that way."
The facilitator also has a role in reinforcing the group's efforts in the discussion, saying, for example:

"This discussion has brought up some interesting points; I can see that there are a lot of opinions about state teams' roles in conducting professional development training in this group. Does anyone else have a comment?"

"This topic has proven more complex than it appeared to be; your discussion raises a number of issues about system building. Are there any more ideas?"

It is helpful to the participants for the facilitator to restate the initial topic of the discussion from time to time to help them stay on track, especially if a sub-point or related but different topic has absorbed the group's attention for several minutes.

**Record the Discussion**

Write participants' comments on flipcharts or other agreed upon media. This will encourage further comments, allow you to be sure all comments are considered, and allow participants to review or summarize the discussion as needed. Be sure to:

- Write their actual words (not every word, just key words); do NOT change their comments to make a particular point. It's better to introduce your own thoughts directly if needed, rather than change participants' thoughts.
- Write down all comments, even those that are not exactly on the subject. If comments seem unrelated to the subject, you may want to start another page titled "Ideas to Discuss Later" or "Parking Lot". Just be sure to return to the list at a later point.
- Write down any action items for follow-up that may come out of a discussion. Start a separate flipchart that can be added to throughout the meeting and reviewed at the end to be sure no follow-up assignments fall between the cracks.
Engage All Participants in the Discussion

Your goal is to ensure that everyone has a chance to participate. This enables the group to have the benefit of everyone’s thinking and to help the group form a common view of a topic. It is not important that everyone speak up a certain number of times or that all participants contribute at the same rate. Some people naturally talk more, others less. It is desirable for most participants to join in a discussion for it to be of greatest interest and value to the group, but it is most important that everyone knows that he or she can contribute at any point they choose to.

How to Engage Quiet Participants

Welcome comments from quiet participants, but don’t call on people by name or be too insistent. Respond to quiet participants’ unspoken, but apparent concerns (a quizzical look, a furrowed brow), but don’t try to interpret them. Invite questions or comments in a general way:

Do ask: “It looks like there might be a few questions or comments....”

Don’t say: “You look confused, Ed.”

Get the Views of the Whole Group

If you wish to elicit the views of all participants on a topic, you can poll the group, and ask each person to respond briefly. When you poll the group, give people the option to pass and not speak; it’s best not to force participants to speak, but rather say something like:

“Will each person please give us your thoughts about the issue of requiring transition related assessments for all ninth graders? Those who don’t have a comment at this time may just say, ‘I pass’.”
Handling Problem Behavior Constructively

Your goal is to ensure that the behavior of some people does not reduce the value of the discussion to the whole group. Often "problem" behavior can be avoided if you establish clear ground rules and ensure that everyone has a chance to participate. If that is not enough, try these techniques:

How to Respond To Challenges

Don't over-react, just acknowledge the points the participant makes. If possible, find merit in what he or she has said, agree with what you can, and then move on.

How to Respond To Unanswerable Questions or Irresolvable Concerns

If a participant asks you a question you cannot answer, check to be sure you understood the point, and if you don't know the answer say so openly and see if any others in the room know the answer or offer to get it:

"I don't know the answer to that question, Grace. I'll check on it this evening and give you the answer tomorrow." or "I don't have the figures you are asking about; does anyone in the group have them?"

How to Handle Side Conversations

Do not cause embarrassment to the participants. The best tack is to talk with persistently disruptive people during a break. If you feel you need to do something during the meeting, do it gently, for example, you might try:

Option 1. If only two people are engaged in a side conversation, you can glance at them, or if that doesn't help, walk toward them (without changing your own behavior—continue making your points or facilitating the discussion); once you get their attention they will usually stop talking on their own.
Option 2. If two or more side conversations start up, you can refer the group as a whole to the ground rules (assuming you have a germane one), or if no ground rule looks appropriate, you can say something like:

"We need to have just one conversation at a time!"

If the group does not have a ground rule you can use to reduce side conversations, for example one addressing side conversations or one on the importance of listening, you might suggest that the group add one. If your relationship with the group is a close one, this situation can sometimes be handled with humor.

How to Handle Non-Relevant Comments

Sometimes a participant makes a comment that does not appear to be on topic, or that introduces a side track you'd rather not have the group pursue. If that happens, wait for the point to be made, acknowledge it, write it on the flipchart if you are recording other ideas, integrate it if possible, and restate the intended subject of the discussion before you ask for the next comment from the group.

How to Handle a Person Who Makes Too Many Comments

If one participant seems to speak up too often for others to have a chance to talk, look around for others who want to talk and call on them for a while. If needed, give the too-talkative participant a special job that will give them another way to contribute to the session. For example, you can ask a participant to make a brief presentation on an area of his or her special experience with the subject, or ask him or her to assist you by recording others' comments on the flipchart.

Extracting Key Points from a Group Discussion

For participants to get the most from group discussions, they need a chance to sort out the key points from the various thoughts that may be brought out. A quick way to do that, and not over-control the discussion or interrupt its flow, is to summarize key points from time to time and at the end of the discussion use either of the following techniques.
Option 1: Get participants to identify key points. Ask the participants to summarize what points stand out to them from the discussion by posing such questions as:

"What key points have emerged so far in this discussion?"
"What are ideas you will take away from this discussion?"
"What should we conclude from this discussion?"

Option 2: Identify key points yourself. You may wish to suggest additional summary points to those made by participants, or at times, summarize the discussion yourself to ensure that certain points are highlighted. Be sure when you do that you restate the key points as the participants stated them. Refer back to the flipcharts for the right language if you have recorded discussion points. It is important not to mischaracterize participants' comments. Check with the group to be sure you have captured their main ideas accurately and completely.

Using Brainstorming as a Form of Group Discussion

Brainstorming is a tool used to gather information or generate ideas. In a brainstorming session, participants offer as many ideas about a particular issue as they can think of, as quickly as they can. What distinguishes brainstorming from other group discussions is there is no give and take, ideas are put out and not actually discussed, just listed. Because ideas are not challenged, brainstorming promotes openness and creativity. Because ideas are not discussed, it allows a group to generate many thoughts in a very short time. Facilitators use brainstorming for a number of purposes, including:

- To elicit participants' views on a subject about to be dealt with in greater depth, and thus build their interest in the discussion topic, for example: "What are the main problems associated with transition planning?"
- To define a problem which is more appropriately defined by participants than by the facilitator, for example: "What does the report suggest about how traditional career-tech programs are viewed by the public?"
- To stimulate new or creative thinking, for example, "What are some ways to respond to this problem that have never been considered or tried before?"
• To get participants to consider an issue from a new point of view, for example, *"How would this issue look to you if you were all working in general education instead of working in special education?"*

• To get participants involved in a topic.

• To enable participants to contribute a great deal to the meeting with a very small investment of time.

The main roles for the facilitator in a brainstorming session are to get it started, to document ideas, and to enforce the ground rules. Otherwise, there is very little direct involvement of the facilitator during brainstorming.

**How to Get Brainstorming Started**

Explain the process to participants before you start. To ensure that the brainstorming stays on track, start with a brief explanation of the process, a clear question to be responded to, and a few ground rules, for example:

> "Let's set some ground rules for brainstorming:
> 
> *Think of as many ideas as you can.*
> 
> *No debate, discussion, or evaluation of ideas.*
> 
> *All ideas have value, however unusual they might seem.*"

**How to Get Many Diverse Ideas**

Encourage participants to toss out ideas spontaneously; ask them not to edit their thoughts. Reassure them that all ideas are welcomed; none is too insignificant or too unusual to bring up. Sometimes very substantial or practical ideas emerge from seemingly trivial or unrealistic ideas.

Ask for and encourage participants to offer a lot of ideas. When people are free to give their imaginations a wide range, useful ideas eventually result. Quantity often breeds quality. Restate ideas as they come forward and continually encourage many ideas.
How to Get Ideas Fast

Do not allow evaluation, debate, or discussion of any ideas brought up. If people judge, challenge, or even expand on ideas, two things can happen: (a) participants may become reluctant to speak spontaneously, or (b) the development of ideas will end and a discussion will begin. All commentary should be ruled out so the process can move quickly and remain true brainstorming.

How to Record Ideas

Write participants’ thoughts on a flipchart or other agreed upon media. It is important not to interpret or change people’s ideas; this might cause a meaning to be lost or discourage further participation by inadvertently giving people the impression their ideas are not valued. Review the recorded ideas quickly for the group if brainstorming slows down; this helps to generate new ideas.

How to Manage the Time for a Brainstorming Session

Set a specific time limit of no more than five minutes or set an approximate time limit, for example, a few minutes. Tell participants when the brainstorming starts and finishes. Stop the group when the time is reached or, if an exact time has not been set, stop when ideas start to come more slowly. If participants aren’t finished when the time limit has been reached, extend the brainstorming for one minute at a time as long as ideas continue to come in quick succession.
Section 4: Facilitating Smaller Groups Within a Larger Group or Facilitating Multiple Groups

Sometimes the work of a meeting can be best accomplished by the group working as a whole. Other times, it is useful to break the larger group into smaller groups so that:

- Several issues can be worked on concurrently.
- Complex issues can be discussed in greater depth.
- People who are less comfortable bringing up points in a large group have a more comfortable forum in which to express their views.

When using small group discussions in meetings, keep in mind that the ideal size of a small group is from four to eight participants. This size is big enough to generate diverse ideas and yet small enough to enable all participants to be actively engaged in the discussion.

Creating Small Groups

Whenever you create small groups which require participants to change locations in the meeting room or into break out rooms, be sure that each group understands where it is to convene. If small groups will work within the room, indicate the area in the room where each group should convene. If small groups will be leaving the room to work, write the groups and their locations on a flip chart so you know where each group will be in case you need to talk to them during the discussion period.

Facilitating Multiple Groups

Facilitators are often assigned to work with two or more small groups. This will create a scenario where it becomes critical to manage your valuable time and attention among groups, for example:

- Share content resources among teams with similar needs.
- Work with one team individually while the content resource is helping the other.
• Combine like tasks to include all teams:
  ° Introductions
  ° Ground rules
  ° Content session report outs

Be flexible regarding individual team needs. Teams can come to the table at various stages of the transition planning process. You may have one “new” team attending the institute for the first time, starting a new team planning tool, while another team may have come to the table with the experience of past institutes.
Section 5: Using Flipcharts

Flipcharts are an important tool in facilitation. First, visual presentation of discussion points increases participants' comprehension and retention of the information that is presented or developed in a meeting. Second, each time the facilitator writes a participants' idea on a flipchart, he or she shows respect for that idea. This has the effect of encouraging participants to put more ideas forward. Third, flipcharts transform the individual comments of participants into a group product; once a set of ideas is recorded on flipcharts; the ideas belong to the group. Participants are generally more willing to deal objectively with ideas that have been listed visually they are with ideas at the moment individuals put them forth. Last, flipcharts create a record of the group's work which is valuable for preparing minutes of key outcomes of the meeting after it is over.

Flipcharts are used in two ways in work sessions. The first use is to help give information to participants, and second to help collect information from them. Facilitators can use flipcharts to assist in presenting the purpose, objectives, etc. at the opening of the meeting and to gather the comments of the participants throughout the meeting. Facilitators can personalize their flipcharts and develop a system that will be most conducive to their individual style of facilitating and to their groups needs.

General flipcharts used with the NSTTAC model include, but are not limited to:
- Welcome
- Introductions
- Agenda
- Objectives or Purpose
- Ground Rules
- Ideas
- Parking Lot
- Definition of Consensus
- What Worked
- What Didn’t Work
Preparing in Advance to Use Flipcharts

Typically, you will be given the materials necessary for creating flipcharts during facilitator preparation. These generally include an easel, flipchart pad, markers, and tape. It is then the facilitator’s responsibility to create their individualized flipcharts. Depending on time and/or artistic constraints, flipcharts can look very different from one facilitator to the next.

Using Flipcharts to Give Information

Flipcharts can be a valuable presentation aid when facilitators present information to participants. Unlike other visual aids, flipcharts are uniquely well-suited to the group process and an informal interaction style. First, the facilitator can easily face the participants and even walk around the room while presenting information. Second, the facilitator can write on the prepared flipcharts to highlight key points or make points more dynamically.

Preparing To Use Flipcharts for Presenting

The flipcharts you plan to present from should be prepared in advance of the work session. If you write the flipcharts as you present, your back will be to the meeting participants and your presentation will be slowed down significantly since writing takes longer than talking. Flipcharts prepared in advance may be left in, or taped into a flip chart tablet for transporting to the meeting room. Alternatively, they may be removed from the tablet, rolled up, and either wrapped with an extra sheet of paper or put into a mailing tube for protection.

Arranging Information on the Flipchart Page

Write big enough on the flipchart for everyone in the room to see (1-1/2 inch high letters usually work well); practice with the markers you plan to use so that you are comfortable with them and can write clearly and evenly on the page. Leave lots of white space on the pages. Put only four or five lines of print or only one or two images on a sheet. If the page is too crowded, it will be difficult for people to simultaneously follow what you say and read the information.
Reminding Yourself of Key Points

If you have a number of specific points you want to make regarding an item on the flipchart, or if you have a particular example you want to remember to use, write lightly in pencil on the flipchart near the item to prompt yourself. If you do this just right, you will be able to read your reminders as you stand near the flipchart, but the participants will not even notice them!

Using Flipchart Markers

Use varied color markers to set off points and keep participants' attention. For words and illustrations use markers that are dark enough to be easily read from the farthest seat in the room: black or dark shades of green, blue, brown, or purple work well. To highlight points and make the flipcharts more visually appealing use underlining, arrows, bullets, etc. on your flipcharts. For these purposes you can use lighter and brighter colors, for example, red, yellow, orange, or pink.

Using Flipcharts to Gather Information

When facilitators write participants' comments on flipcharts, several purposes are served. First, participants feel their points are appreciated. Second, ideas on flipcharts can be used later in the meeting to prioritize points, track the flow of a discussion, or summarize key points. Third, the flipcharts are a record of the discussion that can be kept for use in follow up to the work session, for example, developing minutes.

Capturing Participants' Comments on Flipcharts

The most important guidelines using flipcharts to gather information from participants are be legible, be fast, and be accurate. Write big and with dark-colored markers. To help you write fast, don't worry about how your writing looks, and don't try to capture every word, just record key words. Importantly, be sure it's the participants' own words, you record, don't edit! Unlike flipcharts you use to present information, flipcharts you make as participants raise ideas need not have a lot of white space; you can fill each page with writing.
Posting Flipcharts

If you expect to refer to participants' comments during or after a discussion, post flipchart pages on a wall where they are visible to all participants. If there are a lot of flipcharts generated, the walls can be "purged" periodically to avoid a chaotic visual environment for participants. Before the discussion starts, tear masking tape into strips to use in posting flipcharts so you can hang the flipcharts quickly.
Section 6: How to Help a Group Reach Consensus

Consensus decision-making is the heart of what makes groups more effective than individuals. Its special value is seen in the quality of decisions reached and the acceptance of and relative ease of implementation of decisions.

Principles of Consensus Decision Making

While the process of reaching consensus varies depending on the complexity of the issue, the composition and size of the group, a few general principles apply to the consensus-forming process.

Consensus reaching takes time. Group members need time to discuss an issue thoroughly, work out their differences, and find areas of common agreement.

Consensus requires a commitment to decide by consensus. Consensus decision-making is difficult if all members of a group are working in good faith toward agreement; it is impossible if one or some members of the group are not committed to the consensus process. Some groups are skilled at consensus reaching, for example, most mature teams have learned how to reach consensus with little difficulty in most situations. However, when the group is inexperienced with consensus decision-making, or the composition or history of the group alerts you to likely difficulty in reaching consensus, you may want to consider conducting an exercise to illustrate beyond question the value of consensus before the actual decision-making process begins.

Each element of the consensus reaching process must be facilitated with great care. From defining consensus, to agreeing on ground rules for consensus-reaching, to laying out the decision to be made and the decision-making process, each element of the consensus process must be given attention to improve the prospect of a successful decision. Where the group is small, collaborative and experienced with consensus-reaching, the consensus process may be reviewed quickly as a refresher. But where the group is large, adversarial, or inexperienced with consensus, the up-front preparation for the decision-making is critical.
Defining a Consensus Decision

It is important to have a written definition of consensus so that all members of the group understand the task in the same way. A good, workable definition of consensus is:

"A decision in which everyone participates and with which everyone can live and support."

When reviewing the definition, it is helpful to reinforce the points that everyone participates, and that everyone must be able to live with and support the decision for it to qualify as a consensus.

In defining consensus decision-making, it helps to distinguish it from other forms of decision-making. Explain to the group that what consensus is not includes:

Voting. In voting, participation in discussion may be cut short, affecting the quality of the decision, and all members may not support the outcome.

Trading off. "You can have your idea included if you include one of mine". Trading off is efficient, but people don't generally support an idea that was included only as part of a bartering process.

Steamrolling. Arguing long enough to wear others down and have your idea prevail works, but discussion is suppressed and people almost certainly don't support an outcome achieved this way.

Withholding. It may help keep the peace, but when participants do not speak up, their ideas do not get a hearing, thus full participation of all doesn't occur.
You may also want to remind the group that consensus is not:

**Perfect agreement.** A consensus decision represents the common ground in the group's thinking; it is what each member of the group could live with and support that is not the same as perfect agreement.

**Easy or fast.** Consensus is difficult and takes time, but is worth the effort for important decisions because it ensures both quality and support of the decision.

**Facilitating Consensus-Reaching**

Consensus decision-making involves the following steps:

**Define consensus and explain the consensus reaching process.** Be sure that everyone in the group is operating with the same understanding of consensus. Write the definition of what consensus is and what it is not on a flipchart. Explain the process to be used, for example, lay out the steps described below, and refer participants to the ground rules relevant to consensus reaching. If no such ground rules were established at the beginning of the meeting, suggest some ground rules that will help consensus work, for example:

"Express your experience, opinions and logic openly"
"Be open to others' experience, opinions, and logic"
"Use 'I' statements vs. 'You' statements to express differences"
"Express differences in terms of 'concerns' and 'interests"
"Actively seek agreement—look for common ground"
"When we have agreement, we will stop! (No revisiting a consensus decision unless the whole group decides to)"

**Agree on the issue to be decided.** With the help of the group, write the decision task on a flipchart and adjust the wording as needed until everyone understands and agrees on the decision to be made, for example:

"Decision: How the group will approach the task of engaging agency providers in policy analysis and change. ‘Agency providers’ include
rehabilitation service providers, state education agencies (including career-tech, general, and special education), mental health providers, family organizations, and other transition-related service providers at the state level. For the purpose of this decision, we are not considering Federal agencies or national labor organizations."

**Explore the issue.** Facilitate an open discussion of the issue to be decided. Participants may comment on such aspects of the issue and the decision as: previous experience with the issue, problems constraining decision options, or information pertaining to the issue. This discussion may be lightly structured with open-ended questions from the facilitator, but should be free-ranging enough to get each participant's information, concerns, and insights before the group. Sometimes it is helpful to ask the group members not to respond to others' observations, but simply to make whatever points they want to in support of their point of view.

**Develop guiding principles for the decision.** As the group discusses the issue, points may be raised affecting the decision that seems to have general support in the group. If you hear such points, you may begin a flipchart on guiding principles. Or, you may wait until the discussion is finished, that is, when the key points seem to have been explored and comments from the participants are waning, to suggest that the group identify guiding principles for the decision, for example:

"Our design effort must involve no new travel or other significant costs."

"All structural options should be considered, however radical a change they may represent from past ways of doing things."

"All decisions of the design team will be communicated openly with all stakeholders."

**Solicit a proposal.** Ask participants if anyone would like to make a proposal that integrates key points raised in the discussion and conforms with the guiding principles. Write the proposal on a flipchart so everyone can consider it exactly as it was proposed. You may yourself be able to make a proposal (based entirely on what participants have said during the discussion.
and the development of guiding principles), but it is usually best for the proposal to come from one or more of the participants. You may wish to take a preliminary poll of the group at this point to see how close they may be to consensus.

Refine the proposal. Ask participants to raise any concerns or ideas they may have about any aspect of the proposal. Explain to participants that the goal of this step is to make adaptations to the proposal so that all participants can support it.

Ask for a show of consensus. It is important in consensus reaching that each participant makes an affirmative statement or gesture showing his or her agreement with the decision. It is not adequate to informally check for agreement, for example by saying something like, "Does everyone agree...we'll take no response as implied approval of the proposal." Each person must make a personal commitment to the consensus decision. Some groups use a poll of the group — each participant stating his or her concurrence. Others use a show of thumbs up or thumbs down. It is useful to provide participants with three options: (1) agree, "I support the decision as written," (2) disagree, "I do not support the decision as written", or (3) agree with reservations, "I can live with the decision as written". Thumbs sideways indicates the latter when the thumbs-method is being used to ascertain consensus.

If the step of refining the proposal has been handled thoroughly by the facilitator and by the group members, consensus is often achievable on the first request for a show of sentiment. However, if one or more participants has continuing reservations and do not support the proposal as written, request further refinements to the proposal, then ask for a show of consensus again.
Section 7: Managing Conflict in Groups

Conflict is inevitable when people work in groups to develop, explore, expand, and make decisions about subjects that matter to them. It is not only a natural human behavior, but in its positive form (differing, as opposed to arguing) it is also an important part of the creative process. Without the freedom to differ, groups may find themselves limited to only the most conventional, accepted kinds of thinking and problem solving. Furthermore, conflict is essential to critical thinking. Groups in which members do not effectively express their differences can fall into group think, a mode of group behavior in which ideas, even ideas which are not well thought through, may prevail despite the individual group members' ability to know the ideas are not useful, or worse, actually harmful to the group's goals.

Strategies for Managing Conflict

Regardless of the source of the conflict, strategies can be employed with groups which will resolve conflicts constructively in almost all instances. They include the following approaches:

Acknowledge conflicts as they emerge. If differences of a cognitive nature arise within a discussion or while working on a task, recognize them openly at the time they occur, before frustration has a chance to grow and create an emotional situation.

Use ground rules. Written, posted ground rules can help group members manage their own dinosaur behavior. The first point of return when the group experiences difficulties, whether of an individual or group nature, is the ground rules. It's a good idea for one of the ground rules to make it o.k. to differ and for another to call for all ideas to be treated with respect. A review of the ground rules may help group members get back into control when emotional behavior arises. If you know in advance that a subject for group discussion or an assignment within the group is likely to prompt emotional reactions, it is useful to discuss that fact ahead of time, and how to avoid emotional conflict before it happens.
Have group members explain and listen to conflicting views. When different points of view cannot be readily reconciled, it is helpful for (a) a proponent of each point of view simply and objectively state the point, while (b) others are asked to listen and vice versa. Remind the speakers to use neutral language in their statements. Often a clear restatement will help the group see that the views are not mutually exclusive and can be accommodated into the group’s discussion or decision.

Look for common ground or compromise. If differences are not resolved once restated, the individuals or the group then look for commonalities, opportunities for merging different ideas, or ideas for a compromise.

Identify alternatives. If differences cannot be accommodated or a compromise cannot be reached by the participants, try to come up with an alternative idea — one that all can agree on which is neither of the contested ideas.

Review options. If an alternative cannot be identified, then review the options available to the group. Should neither idea be pursued or considered? Should both? Any other alternatives?

Postpone the issue. Sometimes it is useful to allow a cooling off period and postpone dealing with a difficult issue until later in the meeting or until another time. Often a combination of the chance to have positive experiences in the group on other subjects and the passage of time make it easier to deal with a problem area later on.

Help individuals resolve conflict. If conflict between individuals is affecting the group’s ability to do its work, you can try to help the people who are in conflict by gently asking them to work out their differences:

- Express concerns in terms of the group’s need to do its work.
- Ask the individuals for ideas to resolve the problem; have them meet in a sidebar (a meeting outside of the meeting) to work it out, alone or with one other person.
• Offer alternatives that do not force a loss of face.
• Ask the individuals to meet with you or with a volunteer from the group in a mediator capacity outside of the meeting to resolve the conflict.

If your strategies have not solved the problem, consult with the institute staff or other facilitators for ideas to address the problem. In these conversations, be sure to use an objective approach and language so as not to fuel the fire.
Section 8: Facilitating Teambuilding

Understanding Team Formation

As a facilitator, you need a sound understanding of group dynamics in order to be of real help when working with teams. Teams have an especially challenging task in the early stages of their development. Five stages of development have been identified.

Stage 1: Forming

The forming process occurs when members of the team meet one another and begin exploring their roles in the team, their relationship with one another as team members, and ideas about how the team will operate. Even if the team members already know each other, if they are just beginning to work in this team, the forming stage still occurs. This stage is generally characterized by uncertainty: members' tentative sharing of information and ideas, polite exploration of options, and careful scrutiny of other members of the team.

Stage 2: Storming

Storming begins when members of the team begin to understand their differences and encounter divergent ideas about their task, their roles, and the processes by which they will do their work. This stage is generally characterized by disharmony: competition of individuals, ideas, and approaches; conflict among members about differences; frustration about the lack of cohesion; sectionalizing of the team into differing camps, and threat of the group breaking down.

Stage 3: Norming

Norming occurs when members of the team begin to recognize a common interest in the team and its task, develop common goals for the team, clarify roles of individuals within the team, and develop strategies for working together smoothly. This stage is generally characterized by optimism: relationships in the team deepen, tensions ease, members' concerns are resolved,
and the team's task and process are clarified and the formation of a team is underway.

**Stage 4: Performing**

Performing emerges when members of the team work productively to achieve their goals and carry out their work. This stage is generally characterized by productivity: a sense of progress and achievement on the part of the team develops, bonds are formed between members, and enthusiasm and creativity for the team's work are high.

**Stage 5: Adjourning**

Adjourning then occurs when members of temporarily-established teams, having completed their task, prepare to disband. This stage is generally characterized by reluctance to part: team members review their experiences together, evaluate their accomplishments, and often arrange to keep in touch. For standing teams, especially if they are small, this phase occurs when a member leaves the team.

**Helping a Team through the Forming Stage**

Several strategies are available to the facilitator to help a team during the Forming stage, including the following.

**Ensuring team members really get to know one another.** Provide a process for in-depth introductions if team members don't know one another. If they do know each other, but have not worked in this team before, offer a process by which they can begin sharing their values about the work at hand, for example:

"As you introduce yourselves, please explain the reason or reasons why you signed up for this team."

"As you introduce yourselves, please describe what you would like to see come out of this team experience."
"After you have introduced yourselves, please develop a joint statement — a few sentences — about what you will be able to accomplish as a team that might not have been accomplished or accomplished as well if you were doing this work as individuals."

Creating feelings of inclusion. Use non-judgmental, supportive language and behavior, for example:

- Acknowledge and reinforce different thinking and working styles in positive way vs. expecting all team members to adopt a particular, narrow set of beliefs, or practices.
- Respond to challenges in a receptive, non-defensive manner, establishing an open dialogue with all members of the team vs. demeaning or closing off discussion of concerns expressed by some members.
- Support each person in the team, especially when outlying views are expressed or special needs or problems emerge vs. allowing any individuals to become isolated in the team.

Helping a Team through the Storming Stage

Strategies to help a team during the Storming stage include the following.

Dealing with differences openly. Bring differences out into the open; use the ground rules to encourage different points of view being expressed, listened to, and respected.

Handling issues affecting the team, in the team. Help the team explore differences in team members' background, so differences in point of view can be understood in context. Involve all team members in resolving issues, for example, when issues about the team's work are raised by one or a few people, encourage the whole team to help define, analyze, and resolve the issues. Encourage the team to work out its issues together, and not to bring up complaints or disagreements outside of the team.
Helping a Team through the Norming Stage

You can expedite the team’s progress toward and through the Norming stage with these approaches:

**Get the team to agree explicitly on what it is trying to achieve.** Have team members develop a consensus statement of the team’s vision, mission, or common purpose early on in their work together. At the start of each meeting or each new task, have team members discuss what the objectives are for that specific situation.

**Help the team develop common values.** For example, lead a discussion on the importance of the project at hand, possible positive outgrowths of your efforts, or what would make this project or effort the biggest possible success. The team may also benefit from a discussion of what is a team, so that they can establish common values about themselves as a team.

![Image of a sign with goals]
Section 9: Evaluating Work Sessions

Because the best source of information about a meeting's effectiveness is the participants themselves, facilitators can get a good reading about how the meeting is going from daily participant feedback. This feedback will also be reported at the conclusion of each group meeting at a report out session for all facilitators. Such feedback should be:

- Actively requested.
- Systematically collected—(a) time set aside in the meeting for participants to respond, (b) in writing, to (c) a clear set of questions.
- Easy for participants to provide and for facilitators to analyze.
- Responded to and used by the facilitator.

Questions to capture information on what worked well each day and what needs to change can be as simple as:

"What did you particularly appreciate about today?"

"What would you like to see done or done differently tomorrow?"

The NSTTAC institute model includes a facilitator debrief at the completion of the day, during which the feedback is presented and discussed. Issues or problems that can be addressed on site are solved, such as adding water stations or adjusting temperature controls. Long-term issues are addressed in future planning when feasible, such as increasing additional team time on the agenda.

At the next day's first large group meeting, the feedback is presented and actions taken described. This process illustrates that participants' feedback is taken seriously. At the final team meeting, the facilitator also encourages team members to complete the institute evaluation.
Facilitator Preparation Agenda – September 9, 2009

9:00 Overview of Today
   • Agenda for today’s facilitators’ preparation
   • Introductions
     • Name
     • Organization
     • Role in transition
   • Purpose
     • To help prepare for your role as team facilitators
   • Objectives
     • Understand what is expected of you as a facilitator
     • Clarify the work and product expected of the teams participating in the institute
     • Provide facilitation tools to help you succeed and teams achieve their goals
   • Ground rules for today
     • Be open to new ways of doing things
     • Share experiences and ideas
     • Ask questions and express concerns
     • Listen for what is new
     • Think ahead, not back
     • Follow accepted forms of civil behavior
     • Decisions by consensus
     • Work hard and have fun
     • Others?

9:30 Description of the Institute
   • Purpose
     • Increase knowledge of selected topics
       • Agency services available to your students
       • Effective transition program components
     • Assess progress on implementing these practices
     • Determine strengths and needs
     • Develop plans to address identified needs
     Network and have fun!
   • Institute format
     • Hybrid “Institute/Conference” model
   • Participants
Facilitator preparation is a resource provided by the National Secondary Transition Technical Assistance Center (NSTTAC). Further information may be found at www.nsttac.org.
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- 2:30 PM – 4:00 PM
- Friday—September 11
  - 10:15 AM – 12:15 PM (plus lunch if desired)
  - 1:15 PM – 2:45 PM
- Team meeting materials – See Facilitator Roles and Team Meeting Details
  - Material in facilitator folder
  - Materials in institute “packet” (e.g., program, institute evaluation, etc.)
  - Content resource schedule and content resource requests—Please follow schedule!!
  - Jump drives
  - Flipcharts and markers
  - Record for identifying what worked and what didn’t
- Using content resources
  - Prepare requests for the following team meeting only
  - Use the content resource availability list – if they are not on the list, please don’t request them!
  - If we don’t pick up your request, please turn it in at registration table
  - We’ll deliver the schedule for each team meeting back to you
  - Please follow the schedule so they can get to meetings with other teams
  - Please DO NOT give request to the content resource directly!!
  - Let us know if you move your meeting space and/or change your mind and want to cancel the request
- Communicate what works and what doesn’t
  - Facilitator debrief Thursday, Calypso Room, 4:00 PM – 4:30 PM

**11:50 Facilitator Assignments**
- Team assignments
- Team meeting rooms

**12:00 Lunch**

**12:45 Active Facilitation and Key Facilitation Skills**
- Role of the facilitator
  - Neutral servant of the group
  - Process advocate
  - Progress advocate
- Using the active approach
  - Facilitate the group
  - Help the group plan
  - Help the group evaluate the institute
Facilitator preparation is a resource provided by the National Secondary Transition Technical Assistance Center (NSTTAC). Further information may be found at www.nsttac.org.

- Using the facilitator handbook
  - Sections most needed for this institute – 2, 3, 5, 6, 7, 9
- Key facilitation skills
  - Leading group discussions (see Section 3)
  - Establishing small work groups (see Section 4)
  - Managing conflict (see Section 7)
  - Using flip charts (see Section 5)
  - Strategies for working with controversy
  - Facilitator role vs. team leader role

1:30 Using Flip Charts

- Colors, emphasis, number pages, tape “turtles”
  - To give information
    - Keeps peoples’ interests
    - Increases comprehension
    - Improves retention
  - To get information
    - Shows respect
    - Reinforces participation
    - Provides a group memory

1:45 Facilitator Strategies

- Lessons learned from “experienced” institute facilitators
- Teams within teams for some facilitators, develop “small team” plans
- Stick to schedule as much as possible
- Use people resources: institute committee, presenters, and other content resources
- Use handout resources
- Address individual team issues
- Recognize and build on diverse levels of knowledge
- Communicate what works and what doesn’t
- Encourage your team(s) to spread out attendance at breakout sessions
- Be prepared for your team meetings
- Use us to help problem solve

2:15 Questions and Problem Solving

2:30 What Worked and What Didn’t?
Welcome to the 2009 Fourth Annual Oklahoma Transition Institute

Facilitator Preparation

Your Hosts Today
- Dr. Paula Kohler, Western Michigan University
- Jennifer Coyle, Western Michigan University
- June Gothberg, Western Michigan University

National Secondary Transition Technical Assistance Center

Oklahoma Transition Institute
Purpose: Improve student outcomes!

Process: Improve student outcomes by improving what we do!

Today’s Agenda
- Introductions
- Overview of the institute
- Overview of your role
- Institute agenda
- The institute team planning tool

Today’s Agenda continued
- Strategies for working with your teams
- Tools for facilitating your team’s work
- Preparing for the institute
- Questions
**Introductions**
- Name
- Organization
- Your role or position

**Purpose of this Preparation**
- To help prepare for your role as a team facilitator

**Objectives of Preparation**
- Understand what is expected at the institute and during the year
- Clarify institute work and outcomes
- Provide facilitation tools

**Ground Rules**
- See Flipchart

**Consensus**
- See Flipchart

**Facilitator Preparation**
- Description of the Institute
Oklahoma Transition Institute

Purpose

- Increase knowledge
- Reflect on current practices
- Develop plans to address needs

Purpose of the Institute

- Increase knowledge of agency services available to your students
- Increase knowledge of effective transition program components
- Determine strengths and needs
- Develop plans to address identified needs
- Network and have fun!

Institute format

- Hybrid “Institute/Conference” model
- Combines elements of a conference with elements of an institute

Participants

- More than 30 teams
- Ranging from small teams (3 or less) to large teams (8 or more)

Institute Organization

- Focus – Content
  - The Taxonomy for Transition Programming
    - Interagency collaboration
    - Program structures

Institute Focus

- Increase knowledge of agency services available to your students
- Knowledge of effective strategies for implementing agency services
- Tools and ideas to adapt and adopt strategies
Institute Focus
Increase knowledge of effective transition program components
- Knowledge of effective transition program components
- Knowledge of effective strategies for implementing transition program components
- Tools and ideas to adapt and adopt strategies

Institute Agenda
Keynotes
- Strengthen Transition-Focused Planning
- In-depth content and breakout sessions
- Facilitated team sessions

Networking Opportunities
- Breakfast and lunch each day
- Evenings
- Poster contest

BREAK
- 15 minute break

Facilitator Preparation
- Intended Product:
  Team Planning Tool for Interagency Collaboration and Program Structures

Taxonomy for Transition Programming
- Student-Focused Planning
- Student Development
- Interagency Collaboration
- Program Structures
- Family Involvement
Taxonomy for Transition Programming

STUDENT-FOCUSED PLANNING
- IEP Development
- Student Participation
- Planning Strategies

FAMILY INVOLVEMENT
- Family Training
- Family Involvement
- Family Enrollment

STUDENT DEVELOPMENT
- Life Skills Instruction
- Employment Skills Instruction
- Career & Vocational Curricula
- Structured Work Experience
- Assessment
- Support Services

PROGRAM STRUCTURES
- Program Philosophy
- Program Policy
- Strategic Planning
- Program Evaluation
- Resource Allocation
- Human Resource Development

INTERAGENCY COLLABORATION
- Collaborative Framework
- Collaborative Service Delivery

A Self-Determination Model

Reflect on How and What We are Doing
Determine Our Strengths and Needs
Set Goals
Develop Plans and Implement
Identify and Seek Support
Assess Our Outcomes
Modify Our Goals

Oklahoma Transition Institute

Purpose
- Increase knowledge
- Reflect on current practices and outcomes
- Develop capacity building plans to address needs

Intended Product
Team Planning Tool for Interagency Collaboration and Program Structures
- Assessment of current implementation
- Identify strengths and needs
- Develop plan

A “Tool” to Facilitate Planning

Focus Questions
- What are we doing now?
- What do we need to do?
- What will we do?
- How will we measure our progress?
Team Planning Tool

- Provides a context for team discussions
- Assists teams to “leave” with concrete ideas

Part 1: Assessing Current Implementation

- This section of the team planning tool guides you to reflect on the extent to which the team is implementing Interagency Collaboration practices and Program Structures (page 10).

Part 1: Assessing Current Implementation

- Use the Implementation Rating Scale to indicate the extent to which the practices or activities are implemented in the team’s school or district.

<table>
<thead>
<tr>
<th>Extent Implemented</th>
<th>DK</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
</table>

Implementation Rating Scale

- DK - We don’t know what or how we are doing in this area.
- 1 - This activity or practice is not occurring.
- 2 - We are developing this activity or practice, but it is not yet occurring.
- 3 - This activity or practice occurs some of the time or with some of our students, but implementation is not consistent.
- 4 - This activity or practice occurs regularly, widely, and consistently.

Part 1: Assessing Current Implementation

- Use the Evidence Rating Scale to indicate the extent to which your implementation rating is based on data that describe the extent of implementation or effectiveness of the practice or activity.

<table>
<thead>
<tr>
<th>Extent/Quality of Evidence</th>
<th>DK</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
</table>

Evidence Rating Scale

- DK - We don’t know if data are available, or if so, what they indicate.
- 1 - We do not have any data regarding this practice.
- 2 - We have very limited data regarding this practice or the quality of the data we have is not very good.
- 3 - We have some data that indicate implementation and/or effectiveness of the activity or practice.
- 4 - We have high quality data that indicate implementation and/or effectiveness.
Part 1: Assessing Current Implementation

- Use the space provided to note how the practice or activity is implemented and what you know about effectiveness.

Part 2: Needs Assessment

- Use information from Part 1 to summarize the current strengths of your transition-focused education and services.
- Build on the information regarding the strengths, identify specific transition education or service needs (page 18).

Part 2: Needs Assessment

- This may include a range of activities.
- You may determine that you need to change practice in your school or district.
- You may determine that to change practice, a policy change is required at the school, district, or state level.

Part 3: Setting Goals and Planning

The purpose of this section is to help make plans for the coming year (page 22).
Use responses from:
- Part 1—Assessing Current Implementation
- Part 2—Identifying Strengths and Needs to identify specific goals that address the identified needs.
Part 3: Setting Goals and Planning

Then identify:
- specific goal-related activities
- the person(s) responsible for the activity
- the timeframe for implementation

Also identify:
- outputs or products to be produced
- anticipated or expected outcomes
- indicators that will determine whether the outcomes were achieved
- data sources by which evidence will be collected

Team Planning Tool

- Strategies for using the tool across teams:
  - Some teams may have already completed Parts 1 and 2 and only need to review Parts 1 and 2 before moving on to Part 3
  - Teams may be experienced and able to tackle both taxonomy areas
  - OR teams may be inexperienced and need to concentrate on a specific area

Team Planning Tool

- Tools are available electronically or paper
- Facilitators have a “clean one-sided” copy
- Every participant has a hard copy
- Teams must turn in one complete tool on Friday (electronic or paper)
Facilitator Preparation

Team Meeting Sessions

Team Meeting Components

- Assigned tasks for each session
  - Review agenda
  - Team discussion time
  - Work through “tool” – using quality indicators
  - Meet with content resources
  - Housekeeping tasks

Team Meeting Schedule

- Thursday, September 10: 1st meeting
  - 9:30 AM – 11:45 PM (Working lunch)
- Thursday, September 10: 2nd meeting
  - 2:30 PM – 4:00 PM
- Friday, September 11: 3rd meeting
  - 10:15 AM – 12:15 PM
- Friday, September 11: Final meeting
  - 1:15 PM – 2:45 PM

Team Meeting Materials

- Materials in facilitator folder
- Materials in institute “packet”
- Content Resource availability
- Facilitator/Team room assignments
- Jump drives
- Your flip charts and markers
- Record for what worked and what didn’t work

Using Content Resources

- Prepare requests for following team meeting only
- Use content resource availability list – if they are not on the list, please do not request them!
- Please return your request to the registration table

Using Content Resources

- We’ll deliver the schedule for each team meeting back to you
- Please follow the schedule so content resources can go to other team meetings
- Please DO NOT request content resource directly
- Keep us informed if you move your meeting space and/or change your mind and want to cancel the request
Facilitator Debrief

- Your time to let us know what works and what doesn’t
  - Thursday in the Calypso Room
    - 4:00 pm – 4:30 pm
  - We appreciate this feedback time and will make immediate changes if possible

Facilitator Assignments

- Team assignments
  - Team “sizes”
  - Team contexts
- Team meeting rooms – map in program

LUNCH

- 45 minute lunch break

Facilitator Preparation

- Active facilitation and key facilitation skills

Your Role as Facilitator

- Neutral servant of the group
- Process advocate
- Progress advocate

Using the Active Approach

- Facilitate the group
- Help the group plan
- Help the group evaluate the institute
The Facilitator Handbook

Sections most needed for this institute:
2, 3, 5, 6, 7, 9

Key Facilitation Skills
- Leading group discussion (section 3)
- Establishing small work groups (section 4)
- Managing conflict (section 7)
- Using flip charts (section 5)
- Strategies for working with controversy
- Facilitator role vs. team leader role

Using Flip Charts

Key facilitation skills
- Using flip charts

Using Flip Charts

- Color
- Emphasis
- Page numbers

Using Flip Charts

- Keeps peoples’ interest
- Increases comprehension
- Improves retention
- Shows respect
- Reinforces participation
- Provides group memory

Facilitator Strategies

- Lessons learned...
- Use teams within teams
- Stick to schedule as much as possible
- Use people resources
  - Institute committee
  - Presenters
  - Content resources
Facilitator Strategies
- Use handout resources
- Address regional team issues
- Recognize and build on diverse levels of knowledge
- Communicate what works and what doesn’t

Facilitator Strategies
- Encourage your team to spread out attendance at breakout sessions
- Be prepared for your team meetings
- Use us to help problem-solve
- Other ideas?

Team Building
See Facilitator manual – Section 8
- 1st - 2nd meeting – forming, storming
- 2nd - 3rd meeting – norming, performing
- 3rd – 5th meeting – performing, adjourning

Questions and problem solving
- Time for your questions

Thank you!
4th Annual Oklahoma Transition Institute
Thursday, September 10, 2009

What Worked Today?

✓
✓
✓
✓
✓
✓
✓
✓
✓

What Needs Improvement?

✓
✓
✓
✓
✓
✓
✓
✓
✓

A resource provided by the National Secondary Transition Technical Assistance Center
Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009

Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009

Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009

Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009

Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009

Welcome Facilitators!

4th Annual Oklahoma Transition Institute
September 10 - 11, 2009
Section 8

Content Resource Scheduling Materials

New Mexico 2011 Materials
- Content resource availability
- Content resource request
- Team schedule of content
- Content resource schedule
### Content Resource Availability

<table>
<thead>
<tr>
<th>Name</th>
<th>Area of Expertise</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Alarid, N.M.H.U. Special Education &amp; <em>Vistas sin Limites</em> Programs</td>
<td>Supported employment programs, special education/transition programming, agency linkages</td>
<td>Tuesday – Thursday</td>
</tr>
<tr>
<td>Deborah Bransford, NM DVR</td>
<td>Preparation for/placement in employment; DVR supports for individuals with disabilities</td>
<td>Tuesday – Thursday</td>
</tr>
<tr>
<td>Jon Paul Burden, Weld Re-4 District, Windsor CO, Director of special education</td>
<td>Writing annual and postsecondary goals, creating sustainable transition teams</td>
<td>Tuesday – Weds.</td>
</tr>
<tr>
<td>Connie deHerrera, Center for Self-Advocacy</td>
<td>Preparing youth/young adults to train others in wide range of self-determination/independence skills</td>
<td>Wednesday</td>
</tr>
<tr>
<td>Kathryn Dzeikan, NMHU Rehabilitation Counseling Program</td>
<td>Academic accommodations, adults in transition (veterans, women, immigration, correctional clients), assistive technology, vocational evaluation</td>
<td>Tuesday 2:30 – 4:30</td>
</tr>
<tr>
<td>Joan Green &amp; staff, UNM Accessibility Resource Center</td>
<td>Higher education accessibility services, including assistive technology</td>
<td>Tuesday – Thursday</td>
</tr>
<tr>
<td>Susan Jojola, NM School for the Deaf Outreach Services</td>
<td>Outreach services for students who are deaf or hard of hearing</td>
<td>Tuesday – Thursday</td>
</tr>
<tr>
<td>Paula Kohler, National Secondary Transition TA Center</td>
<td>Evidence–based transition practices, self–determination, Indicator 13 requirements/research/strategies to improve program evaluation</td>
<td>Tuesday – Thursday</td>
</tr>
<tr>
<td>Phil Moskal, Devel. Disab. Supports Div. Central Registry</td>
<td>Info on resources/strategies/funding for developmental disabilities supports, DD waiver services</td>
<td>Wednesday</td>
</tr>
<tr>
<td>Jim Patton, University of Texas, adjunct and professor</td>
<td>Transition assessment/ planning, life skills instruction, adults with learning disabilities, accommodation of students with special needs in inclusive settings, mental retardation forensics specialist in death penalty cases</td>
<td>Tuesday</td>
</tr>
</tbody>
</table>
## Content Resource Request for
### Second Team Meeting — Tuesday, June 14, 2011 — 2:30 p.m. - 4:30 p.m.

**Facilitator:**

<table>
<thead>
<tr>
<th>Team Name</th>
<th>Meeting Location</th>
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<tbody>
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</table>

<table>
<thead>
<tr>
<th>Content Resource Requested</th>
<th>Topic</th>
</tr>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Two slots for content resources are available during this team meeting. Choose three individuals if you’d like, in case any of your choices are not available.

---

## Content Resource Request for
### Second Team Meeting — Tuesday, June 14, 2011 — 2:30 p.m. - 4:30 p.m.

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</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
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</table>

**Note:** Two slots for content resources are available during this team meeting. Choose three individuals if you’d like, in case any of your choices are not available.
### Content Resource Request for
Third Team Meeting — Wednesday, June 15, 2011 — 2:30 p.m. - 4:30 p.m.

<table>
<thead>
<tr>
<th>Team Name</th>
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</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
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<th>Topic</th>
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</tr>
</tbody>
</table>

**Note.** Two slots for content resources are available during this team meeting. Choose three individuals if you’d like, in case any of your choices are not available.
**2011 New Mexico Summer Institute - Transition Strand**  
Content Resource Request for  
Final Team Meeting — Thursday, June 16, 2011 — 8:45 a.m. - 10:45 a.m.

**Facilitator:**

<table>
<thead>
<tr>
<th>Team Name</th>
<th>Meeting Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
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<tr>
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<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note. Only one slot for content resources is available during this team meeting. Choose two individuals if you’d like, in case your first choice is not available.

---

**2011 New Mexico Summer Institute - Transition Strand**  
Content Resource Request for  
Final Team Meeting — Thursday, June 16, 2011 — 8:45 a.m. - 10:45 a.m.

**Facilitator:**

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Note. Only one slot for content resources is available during this team meeting. Choose two individuals if you’d like, in case your first choice is not available.
Team Schedule of Content Resources for
Second Team Meeting — Tuesday, June 14, 2011 — 2:30 p.m. - 4:30 p.m.

Team: ___________________________ Facilitator: _______________________________

Meeting Location: _____________________________________________________________

<table>
<thead>
<tr>
<th>Time</th>
<th>Content Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:35 p.m. – 2:55 p.m.</td>
<td></td>
</tr>
<tr>
<td>3:00 p.m. – 3:20 p.m.</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>Content Resource</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------</td>
</tr>
<tr>
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<td></td>
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Team Schedule of Content Resources for
Final Team Meeting — Thursday, June 16, 2011 — 8:45 a.m. - 10:45 a.m.

Team: _____________________________  Facilitator: ______________________________
Meeting Location: _____________________________________________________________

<table>
<thead>
<tr>
<th>Time</th>
<th>Content Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:50 a.m. – 9:10 a.m.</td>
<td></td>
</tr>
<tr>
<td>9:15 a.m. – 9:35 a.m.</td>
<td></td>
</tr>
</tbody>
</table>
**2011 NEW MEXICO SUMMER INSTITUTE - TRANSITION STRAND**

Content Resource Schedule for
Second Team Meeting — Tuesday, June 14, 2011 — 2:30 p.m. - 4:30 p.m.

Content Resource: ____________________________________________________________

<table>
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**2011 NEW MEXICO SUMMER INSTITUTE - TRANSITION STRAND**

Content Resource Schedule for
Second Team Meeting — Tuesday, June 14, 2011 — 2:30 p.m. - 4:30 p.m.

Content Resource: ____________________________________________________________

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</table>
2011 New Mexico Summer Institute - Transition Strand

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Third Team Meeting – Wednesday, June 15, 2011 – 2:30 p.m. - 4:30 p.m.

Content Resource: ____________________________________________________________

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</table>
### 2011 New Mexico Summer Institute - Transition Strand

Content Resource Schedule for
Final Team Meeting — Thursday, June 16, 2011 — 8:45 a.m. - 10:45 a.m.

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<tr>
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<td></td>
</tr>
<tr>
<td>9:15 a.m. – 9:35 a.m.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Transition Institute Evaluations

Poster Evaluation
New Mexico 2011 Facilitator Preparation Evaluation
New Mexico 2011 Institute Evaluation
Oklahoma 2010 Institute Evaluation
Arkansas 2008 Summit Evaluation
New Mexico 2008 Institute Evaluation
Oklahoma 2008 Institute Evaluation
Colorado 2007 Institute Evaluation
State Plan Implementation Results
Poster Evaluation
Annual Capacity Building Institute
Charlotte, NC
May 8, 2012

Thank you for agreeing to rate state plan implementation results posters. Please use the following rubric to assess the posters.

State team _____________________________ Rater _____________________________

I. The number of state initiatives included on the poster _____________________________

II. Poster content:

<table>
<thead>
<tr>
<th>Content</th>
<th>no</th>
<th>yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. The poster included yearly progress on initiatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. The poster included barriers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. The poster included solutions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. The poster included technology use</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

III. Levels of evidence shown:

<table>
<thead>
<tr>
<th>Level</th>
<th>no</th>
<th>yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Level 1: Quality, Usefulness, and Relevance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Level 2: Participant Learning Outcomes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Level 3: Organizational Policies, Procedures, and Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Level 4: Program Implementation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Level 5: In-school and Post-school Outcomes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Level 6: Evaluation Use and Dissemination</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

IV. Other considerations:

<table>
<thead>
<tr>
<th>Level</th>
<th>no</th>
<th>yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. The poster is well organized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. The poster is easy to read</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
At the end of the institute, please reflect on your preparation to serve as a facilitator. Then spend a few minutes to complete this evaluation and return it to the registration table. Your feedback will help us develop content and materials for preparing next year’s facilitators! This evaluation is also available online at:

http://NM2011instfacprep.questionpro.com

I. Participant Information
   1. Check the description/affiliation that best describes your professional context:
      - [ ] Special education teacher
      - [ ] Local special education administrator
      - [ ] Local transition specialist or coordinator
      - [ ] State education or rehabilitation agency personnel
      - [ ] Higher education faculty or researcher
      - [ ] Graduate student
      - [ ] Other transition services provider:
        ________________________________
      - [ ] Other:
        ________________________________

   2. Have you served previously as a facilitator at a NM transition institute?
      ______ Yes     ______ No

II. Achievement of Intended Outcomes – In terms of preparing you to serve as a facilitator at the institute, please indicate the extent to which you think each intended outcome was achieved:

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Developed understanding of the expectations for a facilitator</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Developed knowledge of the structure and purpose of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Developed working knowledge of the team planning tool</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Developed ideas for conducting team meetings</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Developed overall preparedness for serving as a facilitator</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
III. Usefulness of Content – For each of the following, please indicate how useful you think each item was in preparing you for your role as a facilitator at this institute:

<table>
<thead>
<tr>
<th>Content</th>
<th>1 Not Useful</th>
<th>2 Somewhat Useful</th>
<th>3 Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. The “Facilitator Preparation” manual</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>9. Detailed table presenting overview of facilitator roles and team tasks</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Overview of institute materials (e.g., agenda, content resource materials, team tool, etc.)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

IV. Logistics and Characteristics of the Facilitator Preparation – Please indicate the quality of each characteristic:

<table>
<thead>
<tr>
<th>Logistics and Characteristics</th>
<th>1 Needs Improvement</th>
<th>2 OK</th>
<th>3 Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Overall quality of facilitator preparation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>12. Overall relevance of facilitator preparation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13. Time allocated for content</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>14. Advanced communications</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

V. Strengths, Challenges, and Recommendations

15. In your opinion, what was most helpful in preparing you for your role as a facilitator?

______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
16. In your opinion, what should we have spent less time on during facilitator preparation?
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

17. In your opinion, what should we have spent more time on during facilitator preparation?
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

18. In your opinion, are there additional materials we should provide in the future that would have been helpful to you?
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

19. Ideas for improving preparation of individuals serving as facilitators at future state transition institutes:
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

Thank you for serving as a facilitator and for providing your feedback!
Would you be willing to participate in a follow-up online survey regarding your perspectives on the facilitator preparation?

___ Yes  ___ No

Name: ____________________________________________________________________

Address: ____________________________________________________________________

Phone: ____________________________________________________________________

Email: ____________________________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

___ Yes  ___ No

Email: ____________________________________________________________________
Please spend a few minutes to complete this evaluation and return it to the registration table. This evaluation is also available online at: [http://NM2011institute.questionpro.com](http://NM2011institute.questionpro.com)

**I. Participant Information**

1. Check the description/affiliation that best describes your role as an attendee of this strand.

- [ ] Parent
- [ ] Student
- [ ] Special education teacher
- [ ] General education teacher
- [ ] Transition coordinator
- [ ] Local special education or school administrator
- [ ] District administrator
- [ ] Other transition service provider: ______________________
- [ ] Rehabilitation services provider
- [ ] Other community agency service provider: ______________________
- [ ] Other: ______________________

2. Number of members on your team _____ (Indicate N/A if not on a team)

3. Have you attended the New Mexico Transition Institute previously? Yes ____ No ____

**II. Achievement of Intended Outcomes** – Please indicate the extent to which you think each intended outcome has been *achieved*.

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Increased awareness of ways to connect academics, behavior, and transition planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Increased awareness of strategies for improving SPP/APR Indicator 13 compliance</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Increased awareness of strategies for improving content of individual education programs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Increased awareness of ways to provide relevant transition services and courses of study</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Increased awareness of transition-related resources</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
II. Achievement of Intended Outcomes (cont’d) – Please indicate the extent to which you think each intended outcome has been achieved.

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Increased awareness of strategies for engaging agencies, families, and students in transition planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Increased understanding of evaluation strategies</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Increased awareness of strategies for creating sustainable transition teams</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>12. Development of a plan to address your local need(s)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

III. Quality of Content — Please respond for each session you attended.

Content Session 1: Tuesday 9:45 a.m. – 10:45 a.m.

13a. Place a check mark (✓) by the session you attended:

- Achieving Compliance by Aligning Meaningful Annual Goals with Postsecondary Goals – Part 1 (Burden)
- Using Transition Assessment Information to Integrate Academics and Transition IEP Development (Patton)
- Transition Embedded IEPs (Bruns and Willits)
- Changing Our Focus on Accountability: Using What We Know to Improve What We Do – Part 1 (Kohler)

13b. Indicate the usefulness of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th></th>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

13c. Indicate the relevance of the materials provided in the session you checked above:

<table>
<thead>
<tr>
<th></th>
<th>Not Relevant</th>
<th>Somewhat Relevant</th>
<th>Very Relevant</th>
<th>No Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
</tr>
</tbody>
</table>
III. Quality of Content (cont’d) — Please respond for each session you attended.

Content Session 2: Tuesday 1:15 p.m. – 2:15 p.m.

14a. Place a check mark (✓) by the session you attended:

- [ ] Nuts and Bolts of Indicator 13 Components (Johnson and Lopez)
- [ ] Achieving Compliance by Aligning Meaningful Annual Goals with Postsecondary Goals – Part 2 (Burden)
- [ ] Engaging Community Service Providers in Implementing a Transition-focused Course of Study for Youth with Developmental Disabilities (Alarid)
- [ ] Changing Our Focus on Accountability: Using What We Know to Improve What We Do – Part 2 (Kohler)

14b. Indicate the usefulness of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
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</tr>
</tbody>
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14c. Indicate the relevance of the materials provided in the session you checked above:

<table>
<thead>
<tr>
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<th>Very Relevant</th>
<th>No materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
</tr>
</tbody>
</table>
III. Quality of Content (cont’d) — Please respond for each session you attended.

Content Session 3: Wednesday 9:45 a.m. – 10:45 a.m.

15a. Place a check mark (✓) by the session you attended:

___ Using Your Online Database to Ensure Quality of Transition Programming for Students with IEPs (Nichols)
___ The Cibola High School Greenhouse: Teaching and Learning Mathematics and Career Skills Through a Growing and Composting Program (Rodriguez)
___ Finding Your Voice Through Self-advocacy: Building Linkages Between Family and Community Service Providers (Reeves and Liu)
___ Sustaining Your Team’s Initiative: The NSTTAC Transition Team Leader’s Sustainability Toolkit (Coyle and Bowerman)

15b. Indicate the *usefulness* of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th></th>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

15c. Indicate the *relevance* of the materials provided in the session you checked above:

<table>
<thead>
<tr>
<th></th>
<th>Not Relevant</th>
<th>Somewhat Relevant</th>
<th>Very Relevant</th>
<th>No materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>
III. Quality of Content (cont’d) – Please respond for each session you attended.

Content Session 4: Wednesday 1:15 p.m. – 2:15 p.m.

16a. Place a check mark (✓) by the session you attended:

___ Using Policy to Improve IEP Content (Coyle)

___ Creative Transitions: Providing Transition-focused Learning Opportunities Through a School-based Entrepreneurship (Cunningham)

___ Employment Strategies for Transitioning Youth (Cetera-Jines)

___ Stories From the Front Line: Using Strategic Planning to Create Sustainable and Successful Transition Teams (Burden)

16b. Indicate the usefulness of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

16c. Indicate the relevance of the materials provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Relevant</th>
<th>Somewhat Relevant</th>
<th>Very Relevant</th>
<th>No materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
</tr>
</tbody>
</table>
IV. Facilities and Registration – Please rate the quality of the Institute logistics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>1 Needs Improvement</th>
<th>2 OK</th>
<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>17. Registration process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>18. Meeting facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>19. Location (Albuquerque, NM)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>20. Time allocated for content</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>21. Time allocated for team planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>22. Time allocated for networking</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>23. Team facilitation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>24. Overall Institute structure</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

V. Strengths, Challenges, and Recommendations

25. In your opinion, what was most useful about the Institute?

______________________________________________________________________

______________________________________________________________________

26. In your opinion, what was least useful about the Institute?

______________________________________________________________________

______________________________________________________________________

27. Do you have suggestions or recommendations for additional topics for future Institutes?

______________________________________________________________________

______________________________________________________________________

28. Do you have suggestions or recommendations for improvements to this Institute?

______________________________________________________________________

______________________________________________________________________
Would you be willing to participate in a follow-up online survey regarding your perspectives on the Institute?

___ Yes  ___ No

Name: ________________________________________________________________

Address: ________________________________________________________________

________________________________________________________________

________________________________________________________________

Phone: ________________________________________________________________

Email: ________________________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

___ Yes  ___ No

Email: ________________________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION ~

PLEASE RETURN BOTH DOCUMENTS TO THE REGISTRATION TABLE
Please spend a few minutes to complete this evaluation and return it to the registration table. This evaluation is also available online at: http://OK2010Institute.questionpro.com

I. Participant Information
   1. Check the description/affiliation that best describes your role as an attendee of this Institute.
      □ Parent
      □ Student
      □ Special education teacher
      □ General education teacher
      □ Transition coordinator
      □ Local special education or school administrator
      □ District administrator
      □ Other transition service provider: ____________________________
      □ Rehabilitation services provider
      □ Other community agency service provider: ________________________
      □ Other: ___________________________

   2. Number of members on your team _____ (Indicate N/A if not on a team)

   3. Have you attended an Oklahoma Transition Institute previously? Yes ___ No ___

II. Achievement of Intended Outcomes – Please indicate the extent to which you think each intended outcome has been achieved.

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Increased knowledge of ways to involve students in their IEP development and transition planning.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Increased awareness of strategies to develop students’ occupational and other transition-related skills.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Increased knowledge of transition-related services available to students with various disabilities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Increased awareness of ways to incorporate transition education into the curriculum.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Development of a plan to address your local need(s).</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
III. Evaluation of Content Sessions – Please respond for each session you attended:

9. Breakout Session 1: Wednesday 12:00 p.m. – 1:00 p.m.

9a. Place a check mark (✓) by the session you attended:

- ✗ Creating Transition Electives (Teague and Heller)
- ✗ Developing Transition Activities: Students and Families (LeFrancois and Oliver)
- ✗ Parent Involvement and Self-Advocacy in Transition (Burzio)
- ✗ Student Involvement in the IEP and Transition Planning Process (Martin)
- ✗ Computer Applications and Entrepreneurial Projects via Tech-Now (DeRennaux)
- ✗ Empowerment, Independence, and Equal Access: Students with Disabilities in Postsecondary Education (Cheng)

9b. Indicate the usefulness of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
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</tbody>
</table>

9c. Indicate the relevance of the materials provided in the session you checked above:

<table>
<thead>
<tr>
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<th>Somewhat Relevant</th>
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<th>No Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
</tr>
</tbody>
</table>

10. Breakout Session 2: Wednesday 1:20 p.m. – 2:20 p.m.

10a. Place a check mark (✓) by the session you attended:

- ✗ Understanding DRS and Services (Lucas and Osborn)
- ✗ How to Prepare 9 – 10th Grade Students for Career Tech (Eason)
- ✗ Summary of Performance and Self-Directed Transition Planning (Sylvester)
- ✗ Tools for Developing Self-Determined Students (Little, McConnell, and Cantley)
- ✗ Person Centered Thinking (Long and Randle)
- ✗ Lessons Learned: Setting up a Transition Program (Parker and Cook)
- ✗ Involving Parents of Elementary Students in the Transition Planning Process (Hilborn)
10b. Indicate the **usefulness** of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Useful</th>
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<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

10c. Indicate the **relevance** of the materials provided in the session you checked above:

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>N/A</td>
</tr>
</tbody>
</table>

11. **Breakout Session 3: Thursday 9:00 a.m. – 10:00 a.m.**

11a. Place a check mark (✓) by the session you attended:

- Community Resources for an Effective Transition (Bruce and Garner)
- A Framework for Supporting Individuals with Autism (Damon and Smith)
- Outside the Box Community-Based Work Experiences after High School (Blose and Smith)
- Teaching Transition Education Skills in an Inclusive High School Classroom (Sears and Farley)
- NIMAS: Providing Accessible Materials with Students with Print Disabilities (Jaco and Stinnett)
- Transition in Mid-Del Schools (Winkle, Wilson, and Hurt)
- What Students Need to be Taught Before They Graduate (North)

11b. Indicate the **usefulness** of the content provided in the session you checked above:

<table>
<thead>
<tr>
<th>Not Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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</tbody>
</table>

11c. Indicate the **relevance** of the materials provided in the session you checked above:

<table>
<thead>
<tr>
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</tbody>
</table>
IV. Facilities and Registration – Please rate the quality of the Institute logistics:

<table>
<thead>
<tr>
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<th>1 Needs Improvement</th>
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<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Registration process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13. Meeting facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>14. Location (Norman, OK)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>15. Time allocated for content</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>16. Time allocated for team planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>17. Team facilitation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>18. Overall Institute structure</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

V. Strengths, Challenges, and Recommendations

19. In your opinion, what was most useful about the Institute?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

20. In your opinion, what was least useful about the Institute?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

21. Do you have suggestions or recommendations for additional topics for future Institutes?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

22. Do you have suggestions or recommendations for improvements to this Institute?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
Would you be willing to participate in a follow-up online survey regarding your perspectives on the Institute?

___ Yes  ___ No

Name: ________________________________________________

Address:________________________________________________
_____________________________________________________
_____________________________________________________

Phone: _______________________________________________

Email: ________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

___ Yes  ___ No

Email: ________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION ~

PLEASE RETURN BOTH DOCUMENTS TO THE REGISTRATION TABLE
EVALUATION

Please spend a few minutes to complete this evaluation and return it to the registration table. This evaluation is also available online at: http://www.questionpro.com/akira/TakeSurvey?id=881498

Your feedback will help us design future professional development opportunities and resources that meet your needs.

I. Please tell us about you. Check the description/affiliation that best describes your role as an attendee of this summit.

☐ Parent  ☐ District administrator
☐ Student  ☐ School psychologist
☐ Special education teacher  ☐ School social worker
☐ General education teacher  ☐ Rehabilitation services provider
☐ Transition coordinator  ☐ Other transition services provider:
☐ Local special education or school administrator
☐ Other:

II. Achievement of Intended Outcomes – Please indicate the extent to which you think each intended outcome has been achieved:

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increased knowledge of transition-related assessment</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>2. Increased knowledge of strategies to promote students’ self-determination</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3. Increased knowledge of transition-focused IEPs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Increased knowledge of interagency transition collaboration practices and teams</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Development of a plan to address your local need(s)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
### III. Facilities and Registration – Please indicate the quality of the summit logistics:

<table>
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<tr>
<th>Topic</th>
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</tr>
</thead>
<tbody>
<tr>
<td>6. Institute registration process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Time allocated for content sessions</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Team planning process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>9. Time allocated for team planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Team facilitation</td>
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<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>12. Structure of the summit</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

### IV. Usefulness of Content – For each of the following topics, please indicate how useful you think the summit content will be to you in your job. If you did not attend a session regarding the specific content, choose NA.

<table>
<thead>
<tr>
<th>Topic</th>
<th>1 Not Useful</th>
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<th>3 Very Useful</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Transition-rich IEPs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>14. Age appropriate transition assessment</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>15. Self-determination</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>16. Interagency collaboration and transition teams</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>17. Interagency collaboration</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>18. School-to-work transition</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>19. Partnerships on the move</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>20. CHIRP: Model for interagency collaboration</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>21. Planning for their future</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>22. Successes and failures in getting kids to work</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>23. Self-determination in the classroom</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>24. “Can’t today, can tomorrow”</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
</tbody>
</table>
V. Strengths, Challenges, and Recommendations

25. When should the next Arkansas Transition Summit (2009) be held:

February ______  Summer ______

26. In your opinion, what was most useful about the summit?

______________________________________________________________________________

______________________________________________________________________________

27. In your opinion, what was least useful about the summit?

______________________________________________________________________________

______________________________________________________________________________

28. Do you have suggestions or recommendations for additional topics for future presentations?

______________________________________________________________________________

______________________________________________________________________________

29. Do you have suggestions or recommendations for improvements to this summit?

______________________________________________________________________________

______________________________________________________________________________
Would you be willing to participate in a follow-up telephone interview regarding your perspectives on the summit?

_____ Yes  ____ No

Name:______________________________________________________________

Address:________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

Phone:_______________________________________________________________

Email: ________________________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

_____ Yes  ____ No

Email: ________________________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION

RETURN TO REGISTRATION TABLE
New Mexico Summer Transition Institute  
June 9 - 11, 2008  
Taos, NM

I n s t i t u t e  E v a l u a t i o n

Please spend a few minutes to complete this evaluation and return it to the registration table. Your feedback will help us develop content and materials for preparing future institutes! This evaluation is also available online at the following URL:

http://www.questionpro.com/akira/TakeSurvey?id=977017

I. Please tell us about you. Check the description/affiliation that best describes your role as an attendee of this institute.

☐ Parent  ☐ District administrator
☐ Student  ☐ School psychologist
☐ Special education teacher  ☐ School social worker
☐ General education teacher  ☐ Rehabilitation services provider
☐ Transition coordinator  ☐ Other transition services provider:
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☐ Other:

II. Achievement of Intended Outcomes – Please indicate the extent to which you think each intended outcome has been achieved:

<table>
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<tr>
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<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increased knowledge of how data can be used to improve transition education and services</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>2. Increased knowledge of strategies to enhance school completion</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3. Increased knowledge of transition education and services</td>
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<td>3</td>
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<td>4. Development of a plan to address your local need(s)</td>
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<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Overall quality of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Overall relevance of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Institute registration process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Time allocated for content sessions</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>9. Team planning process</td>
<td>1</td>
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<tr>
<td>10. Time allocated for team planning</td>
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<td>12. Facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13. Structure of the institute</td>
<td>1</td>
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<th>3 Very Useful</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>14. Integrating state performance plan indicator data into the educational plan for student success (EPSS)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>15. Indicators for identifying students at risk of dropping out</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>16. Using SPP/APR Indicator data to plan program improvement</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>17. Improving life outcomes for adolescents with emotional and behavioral disorders</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>18. Culturally competent self-determination</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>19. Summary of performance as a partnership vehicle</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>20. When they miss school, everyone loses</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>21. Positive behavior supports</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>22. The career clusters model for students with special needs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>23. Strategic intervention model (SIM)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
</tbody>
</table>
V. Strengths, Challenges, and Recommendations

24. In your opinion, what was most useful about the institute?
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

25. In your opinion, what was least useful about the institute?
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

26. Do you have suggestions or recommendations for additional topics for future presentations?
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

27. Do you have suggestions or recommendations for improvements to future institutes?
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
Would you be willing to participate in a follow-up online survey regarding your perspectives on the institute?

____ Yes  ____ No

Name:______________________________________________________________________

Address:__________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Phone:_____________________________________________________________________

Email: ____________________________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

____ Yes  ____ No

Email: ____________________________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION

RETURN TO REGISTRATION TABLE
I n s t i t u t e E v a l u a t i o n

Please spend a few minutes to complete this evaluation and return it to the registration table. Your feedback will help us develop content and materials for preparing future institutes! This evaluation is also available online at the following URL:

http://www.questionpro.com/akira/TakeSurvey?id=1036633

I. Please tell us about you. Check the description/affiliation that best describes your role as an attendee of this institute.

- Parent
- Student
- Special education teacher
- General education teacher
- Transition coordinator
- Local special education or school administrator
- District administrator
- Other educational service provider: __________________________
- Rehabilitation services provider
- Other community agency service provider
- Other: __________________________________________________________________

II. Achievement of Intended Outcomes – Please indicate the extent to which you think each intended outcome has been achieved:

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increased knowledge of strategies to facilitate family involvement</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>2. Increased knowledge of effective transition program structures</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3. Development of a plan to address your local need(s)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
III. Facilities and Registration – Please indicate the quality of the institute logistics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>1 Needs Improvement</th>
<th>2 OK</th>
<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Overall quality of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Overall relevance of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Institute registration process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Time allocated for content sessions</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Team planning process</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>9. Time allocated for team planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Team facilitation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>12. Structure of the institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

IV. Usefulness of Content – For each of the following breakout session topics, please indicate how useful you think that content will be to you in your job. For the breakout sessions in each group, please rate only the one you attended.

<table>
<thead>
<tr>
<th>Breakout Session 1: Thursday 1:00 PM – 2:00 PM</th>
<th>1 Not Useful</th>
<th>2 Somewhat Useful</th>
<th>3 Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Transfer of Parental Rights in Special Education (Blades)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>14. Empowering Families for a Better Future (Garner &amp; Bruce)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>15. Families in Student-Centered Roles in the Transition Process (Wandry)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>16. Overview of Rehabilitation Programs for Transition (McDermott &amp; Armstrong)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>17. Competencies for Transition Coordinators/Creating Transition Coordinators (Hilborn et al.)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>18. Developing a Good Local Transition Team (King &amp; Watkins)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>19. Working with Foster Families and Nontraditional Guardians (Hurst)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>20. Transition Education Opportunities for Students with Disabilities in General Education (Bassett)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
IV. Usefulness of Content (cont’d) – For each of the following breakout session topics, please indicate how useful you think that content will be to you in your job. For the breakout sessions in each group, please rate only the one you attended.

<table>
<thead>
<tr>
<th>Breakout Session 2: Thursday 2:15 PM – 3:15 PM</th>
<th>1 Not Useful</th>
<th>2 Somewhat Useful</th>
<th>3 Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>21. DRS/OESC Joint Project to Help Individuals with Disabilities Gain Employment (Harris &amp; Boswell)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>22. Families in System-Centered Roles in the Transition Process (Wandry)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>23. Education for Families of Students of Culturally and Linguistically Diverse Backgrounds (Portley)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>24. Transition and Assistive Technology (Stevenson)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>25. Tech Now (Arnold, Furr, &amp; Parker)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>26. Transition Assessments (Lemons)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>27. Transition Education Opportunities for Students with Disabilities in General Education Classes (Bassett)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Breakout Session 3: Friday 10:15 AM – 11:15 AM</th>
<th>1 Not Useful</th>
<th>2 Somewhat Useful</th>
<th>3 Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>28. A Blueprint for Providing Transition-Focused Content in a Standards-Based world (Bassett)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>29. Social Security Work Incentives for People with Disabilities (Price &amp; Crow)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>30. 18-21 Community-Based Transition Services (Thompson)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>31. How to Involve Native American Parents (Lee)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>32. Integrating Health Care into Transition Plans – Care Notebooks (Worley &amp; Kessler)</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>33. How to Prepare for the Next Step: Postsecondary Education (North)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>34. Developing a Partnership Between Educators and VR/VS Counselors (Kizer &amp; Eames)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>35. Collaboration: The Power of Local Control (Harper)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

V. Strengths, Challenges, and Recommendations

36. In your opinion, what was most useful about the institute?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________
37. In your opinion, what was least useful about the institute?
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

38. Do you have suggestions or recommendations for additional topics for future presentations?
______________________________________________________________________________
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39. Do you have suggestions or recommendations for improvements to future institutes?
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______________________________________________________________________________
Would you be willing to participate in a follow-up online survey regarding your perspectives on the institute?

_____ Yes  ____ No

Name:______________________________________________________________

Address:____________________________________________________________

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Email:________________________________________________________________


Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

_____ Yes  ____ No

Email: __________________________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION

RETURN TO REGISTRATION TABLE
Colorado Transition Institute

June 19 — 21, 2007

Evaluation

To complete this evaluation online, go to http://www.surveys.com/TakeSurvey?id=70717

I. Please tell us about you. Check the description/affiliation that best describes your role as an attendee of this institute.

- [ ] Parent
- [ ] Student
- [ ] Special education teacher
- [ ] General education teacher
- [ ] Transition coordinator
- [ ] Local special education or school administrator
- [ ] District administrator
- [ ] Rehabilitation services provider
- [ ] Other transition services provider
- [ ] Other: _____________________

II. Achievement of Intended Outcomes

Please indicate the extent to which you think each intended outcome has been achieved:

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<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increased knowledge of the federal requirements regarding the content of the IEP</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>2. Increased knowledge of strategies and/or resources for developing students’ IEPs that meet federal requirements</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3. Increased knowledge of local needs regarding student-focused planning practices</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Increased knowledge of local needs regarding student development practices</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Development of a plan to address your local need(s)</td>
<td>1</td>
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<td>3</td>
</tr>
</tbody>
</table>
III: Facilities, Registration, and Structure — Please indicate the quality of the institute logistics:

<table>
<thead>
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<th></th>
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<tr>
<td>6. Institute registration process</td>
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</tr>
<tr>
<td>7. Time allocated for content sessions</td>
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<td>3</td>
</tr>
<tr>
<td>8. Time allocated for team planning</td>
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<td>3</td>
</tr>
<tr>
<td>9. Team facilitation</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Structure of the “hybrid” institute</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

IV: Usefulness of Institute Content — For each of the following topics, please indicate how useful you think the institute content will be to you in your job. If you did not attend a session regarding the specific content, choose NA.

<table>
<thead>
<tr>
<th>Topic</th>
<th>1 Not Useful</th>
<th>2 Useful</th>
<th>3 Very Useful</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Transition-related assessment</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>13. Self-determination</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>14. Contextual learning</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>15. Interagency collaboration</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>16. Parent involvement</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>17. Supports in postsecondary settings</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>18. Nontraditional supports and services</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
<tr>
<td>19. Services for 18 – 21 year olds</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>NA</td>
</tr>
</tbody>
</table>

V: Strengths, Challenges, and Recommendations

20. In your opinion, what were the strengths of this institute?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
21. What should have been presented or discussed, but was not?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

22. What recommendations would you make for the next institute?

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

23. Additional comments:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
Section 10

Transition Cadre Meetings

Progress Update Tool Arkansas 2011
Report on Implementation of Team Plan 2010
Cadre Meeting Agenda Colorado 2011
Cadre Meeting Agenda Arkansas 2011
Cadre Evaluation Arkansas 2011
### TAXONOMY FOR TRANSITION PROGRAMMING

#### STUDENT-FOCUSED PLANNING

<table>
<thead>
<tr>
<th>IEP Development</th>
<th>Student Participation</th>
<th>Planning Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Options identified for each outcome area or goal</td>
<td>- Planning team includes student, family members, and school and participating agency personnel</td>
<td>- Self-determination facilitated within the planning process</td>
</tr>
<tr>
<td>- Post-secondary education or training goals and objectives specified in the IEP</td>
<td>- Assessment information is used as basis for planning</td>
<td>- Planning decisions driven by student and family</td>
</tr>
<tr>
<td>- Occupational goals and objectives specified</td>
<td>- Transition-focused planning begins no later than age 14</td>
<td>- Planning process is student-centered</td>
</tr>
<tr>
<td>- Community-related and residential goals and objectives specified (e.g., voting)</td>
<td>- Meeting time adequate to conduct planning</td>
<td>- Student involvement in decision making</td>
</tr>
<tr>
<td>- Recreation and leisure goals and objectives specified</td>
<td>- Preparation time adequate to conduct planning</td>
<td>- Documentation of student interests and preferences</td>
</tr>
<tr>
<td>- Educational program corresponds to specific goals</td>
<td>- Planning meeting time and place conducive to student and family participation</td>
<td>- IEP education for students</td>
</tr>
<tr>
<td>- Goals are measurable</td>
<td>- Accommodations made for communication needs (e.g., interpreters)</td>
<td>- Career counseling services provided to student</td>
</tr>
<tr>
<td>- Personal needs are addressed in planning (e.g., financial, medical, guardianship)</td>
<td>- Referral to adult service provider(s) occurs prior to student’s exit from school</td>
<td>- Student self-evaluation of process</td>
</tr>
<tr>
<td>- Specific goals and objectives result from consumer choices</td>
<td>- Planning team leader identified</td>
<td></td>
</tr>
<tr>
<td>- Progress or attainment of goals is reviewed annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Responsibility of participants or agencies specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Evaluation of participant fulfillment of responsibilities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Team Planning Tool for Student-Focused Planning Practices

<table>
<thead>
<tr>
<th>Team Name:</th>
<th>Team Member:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Leader:</td>
<td>Position:</td>
</tr>
<tr>
<td></td>
<td>Organization:</td>
</tr>
<tr>
<td></td>
<td>Best Address:</td>
</tr>
<tr>
<td></td>
<td>Best Phone:</td>
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<td>Fax:</td>
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<td></td>
<td>Best e-mail:</td>
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<td></td>
<td>Team Member:</td>
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<td></td>
<td>Position:</td>
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<td></td>
<td>Organization:</td>
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<td>Fax:</td>
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<tr>
<td></td>
<td>Best e-mail:</td>
</tr>
</tbody>
</table>

To include all members, use additional pages if necessary.
### Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes

<table>
<thead>
<tr>
<th><strong>FOCUS AREA</strong></th>
<th><strong>CONSIDERATIONS AND CRITERIA</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goals</strong></td>
<td>• Be specific.</td>
</tr>
<tr>
<td></td>
<td>• Identify what you are trying to accomplish.</td>
</tr>
<tr>
<td></td>
<td>• Think in terms of outcomes rather than process or products.</td>
</tr>
<tr>
<td></td>
<td>• Is the goal achievable within the specified timeframe?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td>• Is the activity action-oriented?</td>
</tr>
<tr>
<td></td>
<td>• Will the activity move you toward your goal?</td>
</tr>
<tr>
<td><strong>Outputs</strong></td>
<td>• Think in terms of “product” – something that will be produced?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expected Outcomes</strong></td>
<td>• Think in terms of impact—what do you expect to happen as a result of your activities and outputs?</td>
</tr>
<tr>
<td></td>
<td>• Is the expected outcome an important aspect of your goal(s)?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome Indicators</strong></td>
<td>• Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?)</td>
</tr>
<tr>
<td></td>
<td>• What information do you need to answer the important evaluation question(s)?</td>
</tr>
<tr>
<td></td>
<td>• Is the indicator specific?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome Data Collection</strong></td>
<td>• Are information sources identified?</td>
</tr>
<tr>
<td></td>
<td>• Available from existing sources?</td>
</tr>
<tr>
<td></td>
<td>• New sources must be developed?</td>
</tr>
<tr>
<td></td>
<td>• What methods will you use to collect information?</td>
</tr>
<tr>
<td></td>
<td>• Must information be collected about all students?</td>
</tr>
<tr>
<td></td>
<td>• Can sampling methods be used?</td>
</tr>
</tbody>
</table>
### STUDENT-FOCUSED PLANNING PRACTICES

Our focus for student-focused planning is on:

Our goal for student-focused planning is:

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
<th>PROGRESS NOTES</th>
<th>UPDATED TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

Additional stakeholders and/or TA needs:
**STUDENT-FOCUSED PLANNING PRACTICES**

Our focus for student-focused planning is on:

Our goal for student-focused planning is:

<table>
<thead>
<tr>
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<th>PERSON RESPONSIBLE</th>
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<table>
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</tr>
</thead>
</table>

Additional stakeholders and/or TA needs:
**STUDENT-FOCUSED PLANNING PRACTICES**

Our focus for student-focused planning is on:

Our goal for student-focused planning is:

<table>
<thead>
<tr>
<th>SPECIFIC GOAL-RELATED ACTIVITIES</th>
<th>PERSON RESPONSIBLE</th>
<th>PROGRESS NOTES</th>
<th>UPDATED TIMEFRAME</th>
</tr>
</thead>
<tbody>
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</table>

<table>
<thead>
<tr>
<th>OUTPUTS/PRODUCTS</th>
<th>EXPECTED OUTCOMES</th>
<th>POTENTIAL INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
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Additional stakeholders and/or TA needs:
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Additional stakeholders and/or TA needs:
Transition Education and Services - Report on Implementation of Team Plan

Team Member(s): ____________________________________________  Team: __________________________

**GOAL:**

**ACTIVITIES CONDUCTED:**

**OUTPUTS PRODUCED:**

<table>
<thead>
<tr>
<th>EVIDENCE COLLECTED</th>
<th>OUTCOMES/IMPACT FROM ACTIVITIES AND OUTPUTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What data were collected to measure the impact of the activities and outputs?</td>
<td>• What did the data tell you?</td>
</tr>
<tr>
<td>• How were they collected and analyzed?</td>
<td>• What was achieved?</td>
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<td>• What conclusions can be drawn from the data you collected?</td>
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Did you achieve your goal? Did the activities, outputs, and outcomes move you toward your goal? Do you need to continue the work next year?
**Goal:**

**Activities Conducted:**

**Outputs Produced:**

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Did you achieve your goal? Did the activities, outputs, and outcomes move you toward your goal? Do you need to continue the work next year?
AGENDA

8:30-9:00 Registration and Networking Time
9:00-9:15 Introductions and Overview of the Day
9:15-9:35 State of the State
9:35-10:00 Introduction to Program Evaluation
10:00-10:10 Break
10:10-12:00 Transition Action Plan Self-Assessment Tool
12:00 -12:30 Lunch
12:30- 1:15 Five Levels of Evaluation
1:15-1:45 Team Planning Time
1:45-2:00 Break
2:00-2:45 Transition Team Leader’s Sustainability Toolkit
2:45-3:15 Report Out
3:15-3:30 Evaluations and Wrap-up
3:30 Adjourn

Maureen Wirth  Barb Goldsby  June Gothberg
CDE CDE NSTTAC
303-866-6885 (303) 866-6695 (269) 387-2821
wirth_m@cde.state.co.us wirth_m@cde.state.co.us june.gothberg@wmich.edu

Transition Leadership Regional Cadre Meeting
South Metro, Centennial, CO ♦ February 8, 2011
North Metro, Thornton, CO ♦ February 9, 2011
Pueblo, CO ♦ February 10, 2011
Grand Junction, CO ♦ February 23, 2011
Tuesday, February 22, 2011 – Salon B & C

10:00 – 11:00  Team Progress reports

11:00 – 11:45  Agency Services – Arkansas Rehabilitation Services: Transition Vocational Rehabilitation, Vocational Rehabilitation, Arkansas Career Training Institute, Judy Smith

11:45 – 12:45  Lunch in the atrium

12:45 – 1:15  Agency Services - Social Security Administration Programs: PASS Plan and Student Earned Income Agency Services, Amanda Miller

1:15 – 2:00  Developmental Disabilities Services: Alternative Community Services Waiver, Carole Cromer; Title V Children with Special Health Care Needs Program, Nancy Holder

2:00 – 2:15  Break

2:15 – 4:00  Case Study Work: Building a Plan for Student Services
Meet Lilly and Jason then work on your own real life student!
Wednesday, February 23, 2011 – Salon B & C

8:00 – 8:30  Breakfast (Foyer)

8:30 – 10:00  Transition Fairs – Whether you have been holding a Fair for years or have been thinking about holding one…learn all the necessary components to have the best Transition Fair! Wayne Foster, Springdale Schools; Carla Curtis, OUR Coop

10:00 – 10:15  Break

10:15 – 11:30  Self-Determination Implementation Updates – Get the latest supplement to the ME! And SDTP, then share the progress of your SD Implementation Plan!

11:30 – 11:45  Special Presentation: College Bound Arkansas

11:45 – 12:45  Lunch (Atrium)

12:45 – 1:30  Team Update of Tool

1:30 – 2:15  Transition Fair Planning Activity/Agency Lists Updates

2:15 – 2:30  Wrap Up/Evaluations
Arkansas Transition Cadre Meeting
The Crowne Plaza by Marriott - Little Rock, AR
February 22 – 23, 2011

Evaluation

Thank you for participating in the Arkansas Transition Cadre Meeting. Please spend a few minutes to complete this evaluation and return it to Bonnie Boaz. Your feedback will help us design capacity building activities and resources that meet your needs.

I. Participant Information –
1. Check the description/affiliation that best describes your role as an attendee of this cadre meeting:
   - Transition specialist
   - Special education teacher
   - Local special education administrator
   - District special education administrator
   - Other transition services provider: ______________________
   - Other: ______________________

2. Did you attend the 2010 Arkansas Transition Summit in Hot Springs, Arkansas?
   - Yes     - No

II. Achievement of Intended Outcomes – Please indicate the extent to which you think each intended outcome has been achieved:

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1: Not Achieved</th>
<th>2: Somewhat Achieved</th>
<th>3: Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Increased understanding of the importance of agency involvement in transition planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Increased understanding of services and programs within select agencies</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Increased knowledge of agencies with services for students with disabilities in AR</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Increased awareness of strategies for effective collaboration with agencies</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Increased awareness of strategies for educators on how implementing a Transition Fair</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Increased understanding of the importance of involving students in planning a Transition Fair</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
II. **Achievement of Intended Outcomes (cont’d)** – Please indicate the extent to which you think each intended outcome has been achieved:

<table>
<thead>
<tr>
<th>Intended Outcome</th>
<th>1 Not Achieved</th>
<th>2 Somewhat Achieved</th>
<th>3 Definitely Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Increased awareness of strategies for collecting useful data from Transition Fairs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Updated progress of self-determination curriculum implementation plan</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Updated progress assessment of team planning tool</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

III. **Quality of Cadre Meeting Logistics** – Please rate the quality of the cadre meeting logistics:

<table>
<thead>
<tr>
<th>Logistics</th>
<th>1 Needs Improvement</th>
<th>2 OK</th>
<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Time allocated for content</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13. Time allocated for assessing progress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>14. Facilities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>15. Overall structure of the cadre meeting</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

IV. **Quality of Cadre Meeting Activities** – Please rate the quality of the cadre meeting activities:

<table>
<thead>
<tr>
<th>Activity</th>
<th>1 Needs Improvement</th>
<th>2 OK</th>
<th>3 Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>16. Review of progress in implementing team planning tool</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>17. Review of case studies and practice with coordinating agency services with student needs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>18. Completion of matching student needs with agency services</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>19. Review of self-determination implementation plan</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>20. Planning and/or review strategies for planning a Transition Fair</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
V. Usefulness of Content - Please rate the usefulness of the content provided:

<table>
<thead>
<tr>
<th>Content</th>
<th>1 Not Useful</th>
<th>2 Somewhat Useful</th>
<th>3 Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>21. Arkansas Rehabilitation Services presentation of services/programs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>22. Social Security Administration presentation of services/programs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>23. DDS/Children’s Services presentation of services/programs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>25. District presentations of Transition Fairs</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>26. College Survival and Success Scale</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>27. Adult Agencies: Linkages for Adolescents in Transition book</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>28. Transition Fair planning and material samples</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
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</table>

VI. Strengths, Challenges, and Recommendations

29. In your opinion, what was most useful about the cadre meeting?

____________________________________________________________________________________
____________________________________________________________________________________

30. In your opinion, what was least useful about the cadre meeting?

____________________________________________________________________________________
____________________________________________________________________________________

31. Do you have suggestions or recommendations for additional topics for future cadre meetings?

____________________________________________________________________________________
____________________________________________________________________________________

32. Do you have suggestions or recommendations for improvements to future cadre meetings?

____________________________________________________________________________________
____________________________________________________________________________________
Would you be willing to participate in a follow-up online survey regarding your perspectives on the cadre meeting?

____ Yes   ___ No

Name:______________________________________________________________________

Address: __________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

Phone:______________________________________________________________________

Email: ____________________________________________________________________

Would you like to be added to our electronic mailing list to receive information about upcoming events, NSTTAC newsletters, and other important announcements?

____ Yes   ____ No

Email: ____________________________________________________________________

DETACH THIS PAGE FROM YOUR EVALUATION

RETURN TO BONNIE BOAZ