



ABLE TRANSITION

CONSULTING

Before we begin

Thank you to NCDSA!



What we will cover

1. What is Transition?
2. The Transition Problem
3. What Transition Involves
 - a. At every stage.
4. Planning
5. Concrete Steps
6. Question Time






Mission

At Able Transition Consulting, we seek to provide a path forward for individuals with disabilities through unique and comprehensive transition life long person-centered planning and bridge building

Vision



To see all people living high quality lives while having a seat at the community table

About me

Kenzie Clark is the Founder and Managing Transition Specialist of Able Transition Consulting. As a former Special Education Teacher, Kenzie saw the need for transition services and sought out a Master's Degree in Secondary Special Education and Transition through the University of Kansas.

The transition process and preparing all families and individuals for high-quality lives is her passion. Kenzie's masters degree provides her with expertise and knowledge regarding all things transition. Kenzie has taught in the public school sector as a Special Educator and at the collegiate level for adults with disabilities.

Kenzie's engagement in the local and broader communities allow her to build bridges to all necessary resources for lifelong success.



What is Transition?

Transition is the process of preparing for and the action of moving from high school to post-secondary education, employment and independent living then living it out, it is the process of being and becoming an adult throughout your life



Why think about Transition now?

RESEARCH!



Consider

- ❖ What are your 3 biggest questions or concerns regarding your child's future?
 - Being able to address those questions and concerns is essential to a higher-quality adulthood. The majority of families only consider a Special Needs Trust. While this is essential planning holistically for every area of life is essential. No parent is immortal, ensure you know the next steps.



The Transition Problem

- Currently 80% of individuals with disabilities are unemployed
- Many individuals do not have long-term housing options & accessible housing
- Schools are not providing essential transition resources and information
- The waiting list for the Medicaid Waivers in various states is up to 15 years
- Many transition plans are not implemented to fidelity and seamless transition is not occurring
- No transition specialists to work with families

Transition Involves

- ❑ Long-Term & Person-Centered Plan
- ❑ Financial Planning
- ❑ Developing a Special Needs Trusts
- ❑ Works-Based Learning
- ❑ Transition IEP
- ❑ Guardianship
- ❑ Housing & Transportation
- ❑ Healthcare Transition & Long-Term Management
- ❑ College & University Options
- ❑ Moving to adult services; apply and navigating the options
- ❑ Accessing benefits
- ❑ Accessing funding (SSI, Waivers)
- ❑ And so much more...

School System & Roles

Family Roles over Time in the school system

- Offer opportunities for youth to develop self-advocacy skills, responsibility, and independence at home
- Talk with youth about where they see themselves in the future
- Discuss with youth about how and why specific accommodations may be helpful
- Monitor IEP progress on their Transition goals
- Become familiar with post-secondary programs, adult services, and community support programs

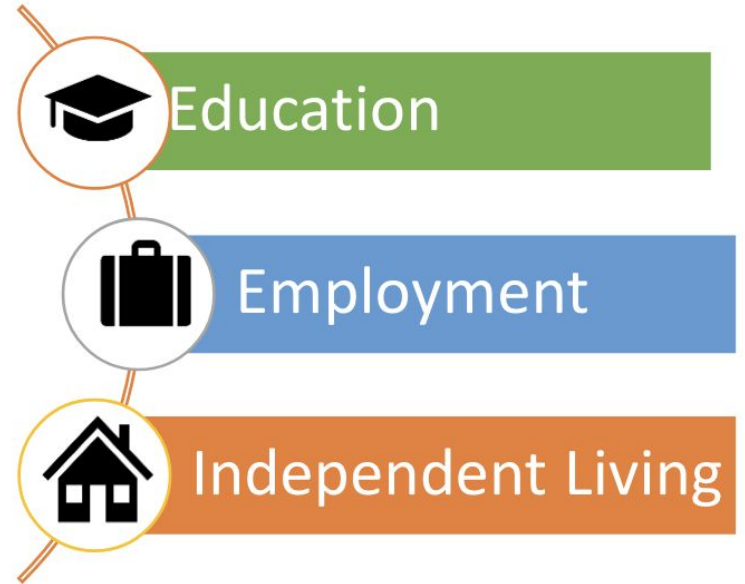
School Staff Roles

- Initiate the transition planning process
- Ensure that an appropriate plan is developed, and appropriate services are provided
- Prepare youth to participate or lead their meetings
- Provide assessments to determine student's skills, abilities, and areas of accommodation
- Include the youth in developing goals based on their strengths and interests
- Identify school programming and accommodations
- Initiate the application for Vocational Rehabilitation no later than 11th grade
- Refine goals in IEP yearly to reflect the youth's vision for the future

Transition Skills

There are three main domains that IDEA requires an IEP plan for starting at the age of 14. Knowing this in advance is essential.

These three domains involve a wide range of skill sets for their life as an adult. Goals for each domain should be clearly stated in the IEP transition plan. Other areas of focus are the individual's relationships, financial literacy, and health and wellness. While creating the transition plan, it's important to keep the youth at the center of the plan. This is known as Person Centered Planning and it's the best way to ensure the transition plan aligns with youth's self identified interests, strengths, and needs.



Elementary School

Elementary school is a foundational time for support and skills development.

1. Benefits & Supports

a. Special Needs Trust

- i. Benefit the child with a disability while ensuring the individual's benefits are secure
- ii. The trust protects the individual's benefits by making the assets "unavailable"
- iii. Can be funded through life insurance policies, the child's parents, aunts, uncles, etc. can put money into the account over time, or as with a life insurance policy it will be funded when the policy goes into effect. No limit to the money in a trust

b. Innovations Waiver

- i. 1915 Waiver in NC
- ii. Provides long-term funding for things like
 1. Direct Support Professionals
 2. Job Coaching
 3. Assistive Technology



Elementary School

- ❖ The IEP & skill development
 - The IEP is a foundational document that is individualized.
 - Ensuring that transition skills are being taught are critical
1. Functional Math
 2. Functional Reading
 3. Activities of Daily Living & Functional Skills
 4. Communication Skills
 5. Self-Determination Skills



Present Levels of Academic Achievement



Address by skill area: Reading, Writing, Math, etc.



Include assessment data:



Describe *instructional* level as compared to *grade* level expectations



Provide information on student's rate of *progress*



Over-all considerations for the IEP

All decisions regarding the completion and/or updates to the IEP should be made by the IEP team on an individual case-by-case basis.

Present Levels of Academic Achievement and Functional Performance (PLAAFP)

It is impossible to write clear and measurable annual goals if you don't have clear and measurable present levels of academic achievement and functional performance.

PLAAFP

- Reflects and indicates the instructional model the student will participate
- Succinctly describes the student
- Describe instructional level versus grade level expectations
- Refer to summative, formative, benchmark assessments (and diagnostic as appropriate)
- Directly relate to assessments and evaluation information
- Provide information on student's rate of progress
- Guide the development of IEP goals and objectives



Present Levels Must

- Be data driven-precise, measurable and observable.
- Provide a starting point (baseline) for development of measurable annual goals.
- Address each post-secondary transition goal area
- Be relevant useful and understandable
- Incorporate information from all team members
- Describe effect of disability on performance
- Identify strengths and prioritize needs
- Guide development of other areas of the IEP



Address Each Bullet on the IEP

- Present levels of academic performance
- Present levels of functional performance
- Present levels related to current post-secondary transition goals (if student is 14, or younger if determined by the IEP team)
- Parental concerns for enhancing the education of the student
- How student's disability affects involvement and progress in general education curriculum
- Strengths
- Academic, developmental, and functional needs related to the student's disability



Present Levels of Academic Achievement



Input from teachers is essential

Observations, reports, grades, class participation, organizational skills, formative assessment
Effective specially designed instruction
Strengths & areas of weakness or errors



Guides the development of IEP goals and objectives



How does the student's current performance relate to reaching his/her future goals?



Present
levels of
Functional
Performance

Functional Behavior Assessment and behavior data

Social skills

PT, OT, mobility

Self help; Activities of Daily Living (ADL)

Organizational skills

Progress monitoring data specific to any related service goals

Present Levels of Functional Performance



Recreation, community participation



Relevant social and health information



Summary of agency support



How does the functional performance relate to the student reaching his/her future goals?



Present Levels of Functional Performance: Describing Behaviors



Description should answer these questions:



What specific type of behavior does the student exhibit?



Approximately how frequently does this occur?



What is happening or under what circumstances does the behavior typically occur?



What is the consequence for the behavior?



What is the perceived function of the behavior (result of FBA)?



What does the student say about his/her behavior?

Middle School

Middle School is the continuation development of skills.

1. Increasing their self-determination during this period is essential for
Development and engagement
2. Working with outside specialists are crucial to begin to think about
Next steps that are needed



Middle School-High School

- ❖ By 14 years of age...
 - The Transition IEP should begin
 - Transition Assessments need to begin at this point



Present Levels Related to Current Postsecondary Transition Goals



Name and date assessments used



Describe results of assessments of interests & preferences



Describe the student's goals for each of the three areas:

Postsecondary Education

Employment

Independent Living

Present Levels Related to Current Postsecondary Transition Goals



Remember that if any goal area is not needed, the present education levels must document WHY.



Remember to address goals that appear to be “unrealistic” with additional assessment data.



Post-secondary goals must be updated each year



Include a statement regarding agency involvement– appropriate to student’s situation and age

High School

By 16 years of age:

1. Begin with the transition goals the three domains
 - a. Independent Living
 - b. Employment
 - c. Post-Secondary Education



What are Transition Services/Activities?

- Action steps that support the student's movement towards post-secondary goal areas
- Slated to occur during current IEP
- Each post-secondary goal area must have:
 - ✓ At least one SERVICE tied to a Measurable Annual Goal to address skill deficit (e.g., reading, writing, behavior, organization, etc.)
 - ✓ At least one ACTIVITY- other activities that help the student reach his/her goal (*next slide*)
- Part of *coordinated set of activities*



Post-Secondary Education/ Training: Examples of Activities

- ◎ Explore post-secondary programs
- ◎ College fairs
- ◎ “Virtual tours”
- ◎ Guest speakers
- ◎ College visits
- ◎ Learn about accommodations
- ◎ Contact Disability Services Office
- ◎ Information on registration for SAT
- ◎ Time management
- ◎ Practice disability disclosure



Employment: Examples of Activities

- ◎ Career exploration
- ◎ Visit / tour CTC
- ◎ Career portfolio
- ◎ Job fairs
- ◎ Guest speakers
- ◎ Community visits/ field trips
- ◎ Research paper on a career of interest
- ◎ Review employment ads
- ◎ Community service
- ◎ Job shadowing
- ◎ Resume writing
- ◎ Graduation project
- ◎ Group meeting with VR
- ◎ Military visits / Jr. ROTC
- ◎ Work experience
- ◎ Explore Job Accommodations Network

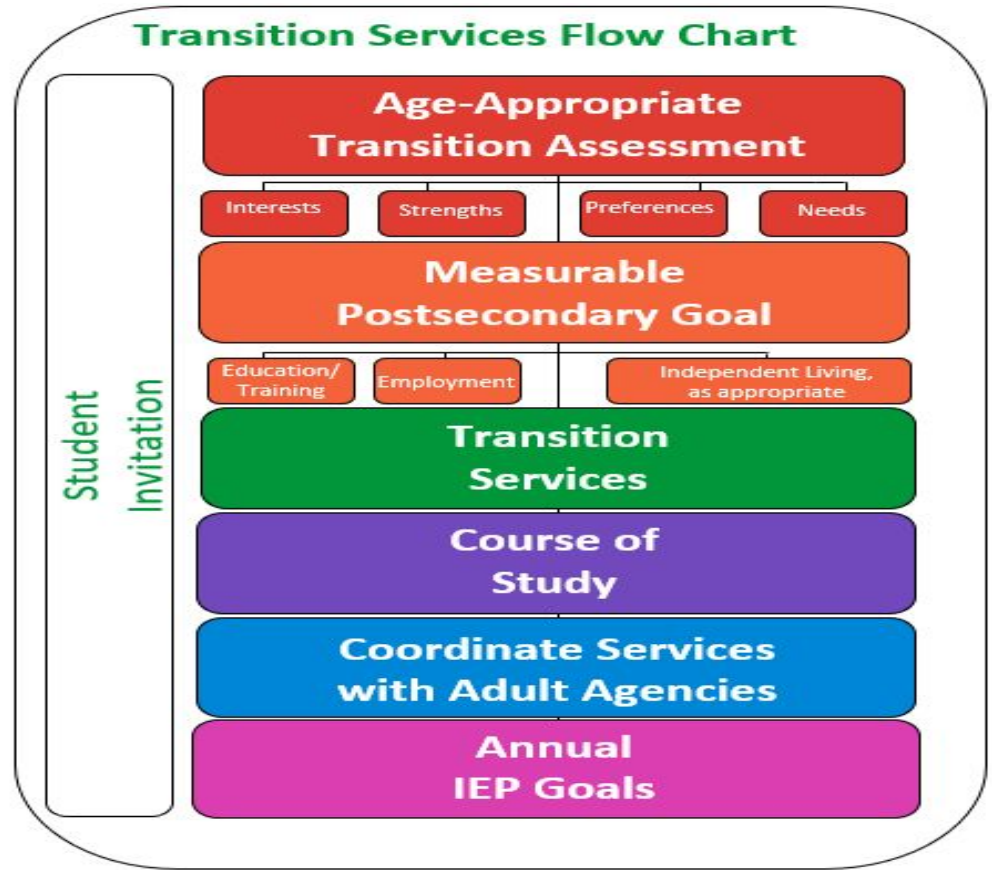


Independent Living: Examples of Activities

- ⊙ Clubs (socialization and participation)
- ⊙ Shopping
- ⊙ Family and Consumer Science activities
- ⊙ Budgeting skills
- ⊙ Food preparation
- ⊙ Checking listings for apartments
- ⊙ Visiting community recreational facilities
- ⊙ Open case with agency
- ⊙ Obtain bus pass



Transition Services Chart



Why Transition Assessment?

- Transition Assessment
 - “is the ongoing process of collecting data on the student’s needs, preferences, and interests as they relate to the demands of current and future working, educational, living, personal, and social environments” (Sitlington & Payne, 2004)



Key to Successful Transition Planning: Transition Assessment

- Assessment data serve as the common thread in the transition process
- Forms the basis for defining goals and services to be included in the Individualized Education Program

(DCDT, 2013)

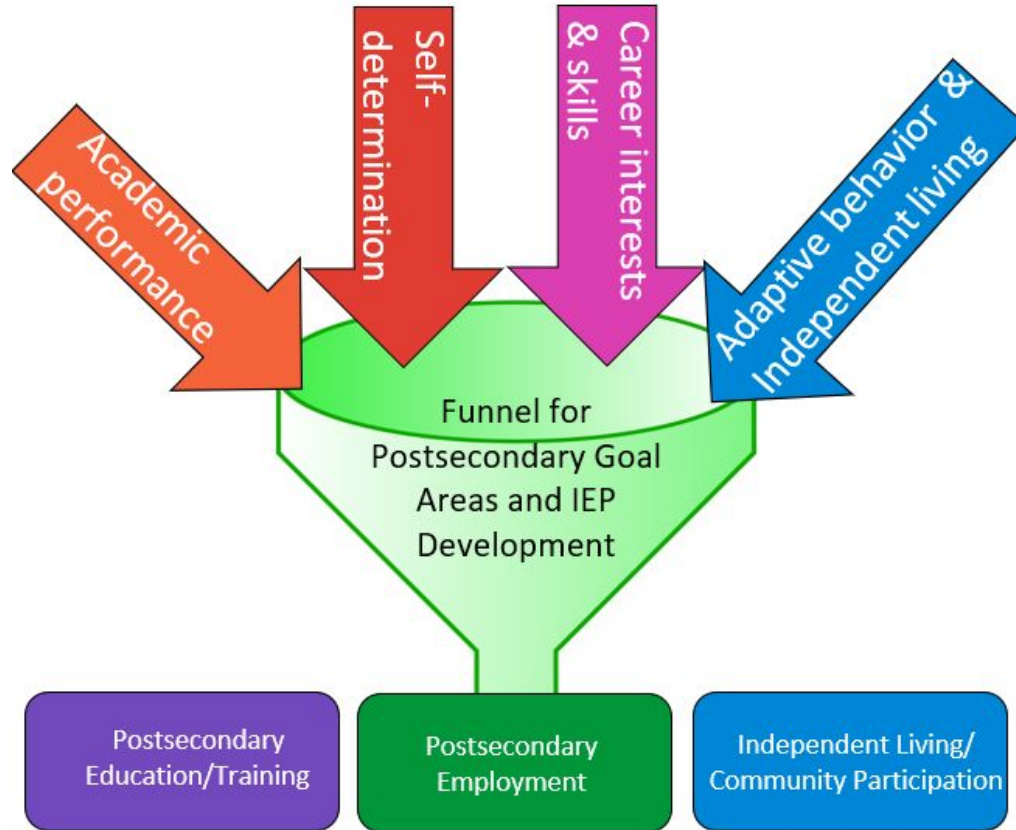


Transition Assessment is strengthened...



- When teachers across the curricula collaborate to conduct transition assessments related to specific content areas
- When families and students are involved in the process







NTACT

National Technical Assistance Center on Transition

Allison

	Postsecondary Vision	Transition Assessment Documentation
Allison	<ul style="list-style-type: none">• Be more organized• Go to a four-year college and succeed• Work with young children	<ul style="list-style-type: none">• AIR Self-Determination Assessment• Informal interviews• Career Employment Education Checklist• School career planning survey for juniors
Allison's Parents	<ul style="list-style-type: none">• Enroll in a college program that will help her achieve her career goals• Find a school and social life balance	<ul style="list-style-type: none">• School Parent Survey• Parent Interviews
Additional Assessment Data	<ul style="list-style-type: none">• Met college entrance and state testing requirements (to date)	



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 13 Checklist

1. Is there an appropriate measurable postsecondary goal or goals in this area?
2. Is (are) the postsecondary goal(s) updated annually?
3. Is there evidence that the measurable postsecondary goal(s) were based on an age appropriate transition assessment?
4. Are there transition services in the IEP that will reasonably enable the student to meet his or her postsecondary goal(s)?
5. Do the transition services include courses of study that will reasonably enable the student to meet his or her postsecondary goal(s)?
6. Is (are) there annual IEP goal(s) related to the student's transition services needs?
7. Is there evidence that the student was invited to the IEP Team meeting where transition services were discussed?
8. If appropriate, is there evidence that a representative of any participating agency was invited to the IEP Team meeting with the prior consent of the parent or s who has reached the age of majority?



Writing Postsecondary Goals



Postsecondary Goals

- Measurable = Countable
- Identifies an outcome, not a process
- One goal for each adult outcome area
- Adult Outcome Areas
 - Education or Training (required)
 - Employment (required)
 - Independent Living (when appropriate)



Postsecondary Goal Questions

- Where is the student going to work or engage in productive activities after graduation?
- Where and how is the student going to continue to learn and/or develop skills after graduation?
- Where is the student going to live and how is he or she going to access adult services, participate in the community and have fun after graduation?



Formula for writing a Postsecondary Goal

(After high school)
(After graduation)
(Upon completion of high school)



(The Student)



will

(Behavior)



(Where and how)



Allison's Examples of Postsecondary Goals

- Education and Training:
 - After graduation from high school, Allison will enroll in (a four-year) college (and pursue a Bachelor's degree in Child Development).
- Employment:
 - After (earning her four-year degree), Allison will obtain (full-time) employment (working with children).

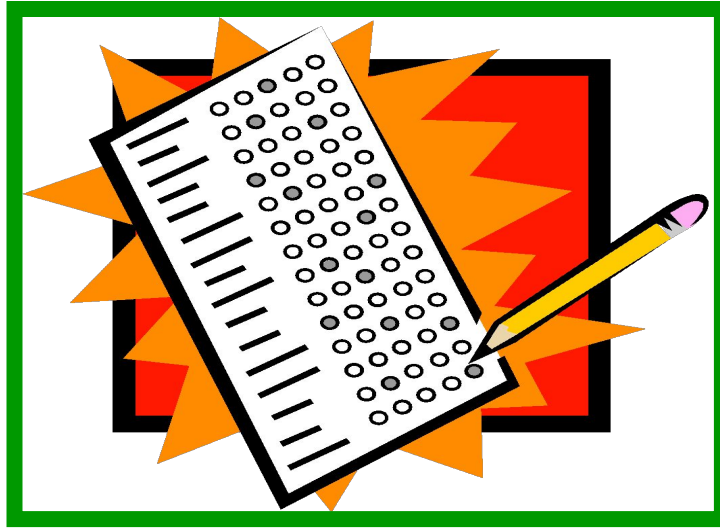


Allison's Examples of Postsecondary Goals

- Independent Living:
 - After high school, Allison will self-advocate for accommodations in college.
 - After high school, Allison will use strategies to effectively manage her time, (so that she successfully meets her deadlines for college).



Age-Appropriate Transition Assessment

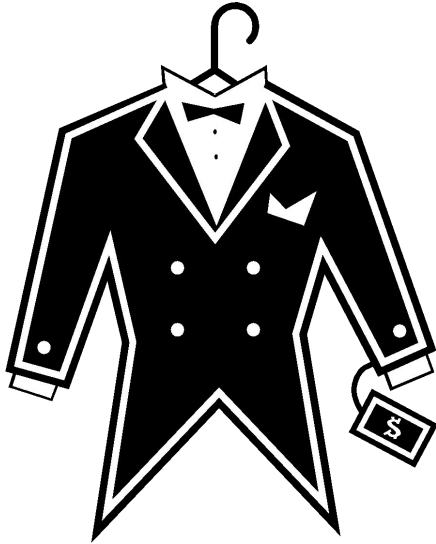


Age-Appropriate Transition Assessment

- We began our process with transition assessments, including
 - Ongoing assessments
 - Age-appropriate assessments
 - Assessments from multiple sources
 - Formal and informal assessments



Types of Transition Assessment



Formal and Informal

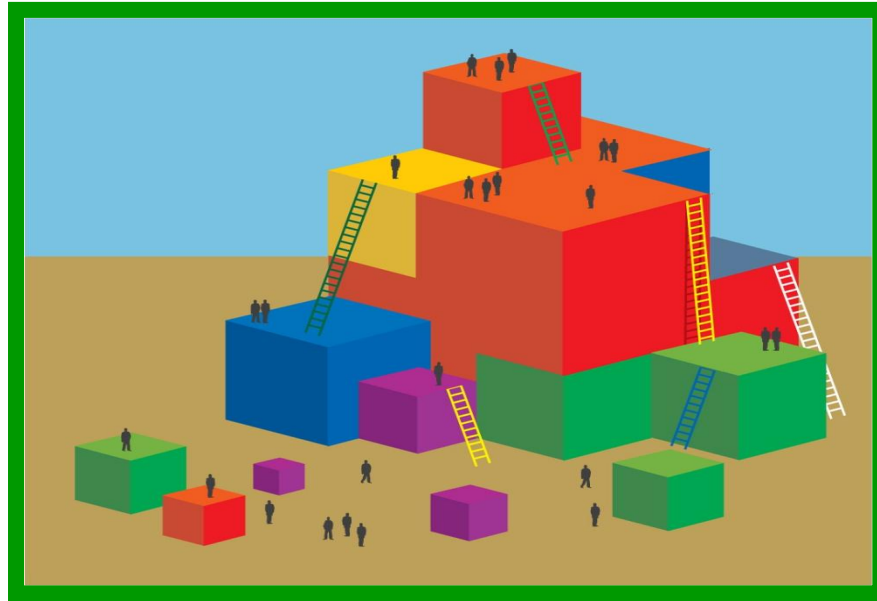


Transition Assessment Questions

- Where is the individual presently?
- Where is the individual going?
- How do we get the individual there? (Colorado DPI, 2005)



Transition Services



Transition Services

- Should focus on academic and functional achievement to facilitate movement from school to post-school life
- For each postsecondary goal, transition services can include:
 - Instruction
 - Related Services
 - Community Experience
 - Development of Employment and Post-School Objectives
 - Acquisition of Daily Living Skills (if appropriate)
 - Functional Vocational Evaluation (if appropriate)



Examples of Transition Services

Instruction – teaching academics, work-related skills, community skills, self-determination skills

Related services – transportation, occupational therapy, physical therapy, job coach

Community experiences – work-based, daily living, visits to local colleges

Employment & other post-school adult living objectives – financial planning, health care, self-advocacy, self-determination

Daily living skills – learning to drive, banking, health care, self-sufficiency

Functional vocational evaluation – formalized employment assessment



Transition Related Activities

- Workplace Readiness
 - [Explore-work.com](#)
 - [myFUTURE.com – Career](#)
 - [Skills to Pay the Bills](#)
 - [Realityworks Curriculum](#)
 - [Dr. Kit - Essential Skills](#)
- Life skills – Household chores (cleaning room, dishes, laundry, taking out garbage, setting table, inventorying household supplies); meal planning (grocery list, shopping, cooking); money skills; outside/yard maintenance; importance of good hygiene.



Transition Related Activities

Job readiness/ exploration

- The Career Index Plus (TCI+)
- <https://www.careeronestop.org/ExploreCareers/explore-careers.aspx>
- <https://www.mynextmove.org>
- Road Trip Nation - YouTube Channel
- Dr. Kit Career Videos
- Virginia Career View

* Contact your local Vocational Rehabilitation office/ Counselor about remote and coordinated Pre-Employment Transition Services (Pre-ETS)



Transition Related Activities

- Transition Assessments – Student and parent transition surveys many on-line assessments of self- determination, career interests and strengths, etc.
 - Transition Assessment Matrix
 - www.transitioncoalition.org
 - Personal Preference Indicators: A Guide for Planning
 - Life Course Framework
 - I'm Determined.org
- Social Skills - practice using various media to keep in contact with family and friends – phone calls, text, FaceTime, social media (safely), Zoom, etc.



School System

The IEP & Goal Development is essential at all ages. The Transition IEP begins when the individual is 14 years of age. A Transition IEP-assessments must be started by IDEA at the age of 14. The Transition IEP legally must have goals and be a complete transition IEP at the age of 16.

Goals: All of the goals **must** be centered around the post-secondary goals:

1. Post-Secondary Education
2. Employment
3. Independent Living

- Your child NEEDs to be at the IEP meeting and be invited.
- The transition assessments must be age appropriate and support your child's needs, strengths and abilities.
- Transition Services need to be appropriate and provided by the school system



Works Based Learning & School

★ Advocate for Works Based Learning! Why?

- Employment
- Finances
- Community Engagement
- Independence
- Social Skills
- Functional Skills
 - If your school system does not provide this, work to access your network
 - Project SEE: OCS Students with Triangle Disability & Autism Services



★ The Transition IEP: Get Agencies Involved

- When your child has a transition IEP it is essential to get agencies involved. Inviting agencies such as Vocational Rehabilitation will be critical for the future.

Being to think about Guardianship

What?

Guardianship is the legal relationship between a guardian and the ward. The guardian makes decisions for the ward whom the state deems insufficient of making substantial decision, managing affairs or communication important decisions.

Guardianship is a spectrum from least to most restrictive. There is also the option of power of attorney or supported decision making.

1. Interim Guardianship
 2. Limited Guardianship
 3. Guardianship of the Estate: Finances, Assets, Property
 4. Guardianship of the Person: Related to Personal Care, Custody & Control
 5. General Guardianship: Complete Guardianship over the individual
- Power of Attorney Options as well

Securing your child's safety and protecting those who may be vulnerable

Can your child make integral decisions regarding their own such as being able to handle and make decisions regarding health and finances?

Applying should take place around 17 years and 6 months

Begin to think about Benefits

Benefits:

Supplemental Security Income

Medicaid

- You will likely get denied the first round and need to appeal
- At the time of a parent's retirement SSI changes to SSDI
- Apply when your child is 17 years of age and 8 months
- Currently the asset limit is around \$2,000 (set by Social Security each January)



Innovations Waiver-Medicaid Waiver: Provides funds for services and supports for persons with intellectual and other related developmental disabilities

Vocational Rehabilitation will depend largely on your location as to how that particular regional office operates and is funded.

Community Supports, Natural Supports, Organizations & Engagements

Financial Future

Special Needs Trust:

- Benefit the child with a disability while ensuring the individual's benefits are secure
- The trust protects the individual's benefits by making the assets "unavailable"
- Can be funded through life insurance policies, the child's parents, aunts, uncles, etc. can put money into the account over time, or as with a life insurance policy it will be funded when the policy goes into effect. No limit to the money in a trust

Able Account

- Tax-advantaged savings accounts for individuals with disabilities who receive SSI and or SSDI
- Protects the individual's benefits
- \$17,000 is the maximum amount that individuals can make as a gift to someone else and not report it to IRS

Medicaid Waiver

- Purpose of the waiver is to provide funding for home and community support services.
- This means that the goal of the funding is to help maximize self-determination, advocacy and self-sufficiency, for community integration, socialization and more...

Long & Short-Term Planning

A long-term care plan & short-term care plan is for an individual with a disability that outlines every area of life to have a comprehensive way forward.

We address: living, home life (grocery shopping, cleaning, etc.), education, post-secondary education, employment, finances, guardianship, healthcare, health, mental health, transportation, safety & more.

- It is a collaborative and goal-setting tool we create together to map out a vision of a the desired future for the individual
- The plan is an all encompassing plan to map out multiple areas of an individual's life
- The plan maps out goals and recommendations for 3 months in the future, 1 year in the future, 3 years and 5 years, 10 years, 15 years

“We cannot recommend Kenzie at Able Transitions enough! We were feeling quite overwhelmed with how to best help our autistic son transition to adulthood. Kenzie was very thorough and broke down all aspects of the process into manageable tasks, all the while making sure our son was the driving force behind any decisions. We are no longer scared about his future - instead, we are excited about what lies ahead for him! In addition to her wonderful skills as a transition advisor, she is a wealth of information about opportunities in the triangle for people with disabilities. She helped us find a driver education teacher, a volunteer opportunity at a Raleigh restaurant, post-high school education opportunities, social and professional skill training, a wonderful counselor, and the list goes on. We cannot imagine where we would be today without Kenzie’s expertise, guidance, and friendship.”

Concrete Steps

Consider:

- What are three things you can do in the next 3 months to begin to prepare for your child/loves one's future

- 1. School System: do you need to address the IEP? Ask about transition assessments?
 - a. Able Transition IEP Power Hour
- 2. Housing: Begin to think about what options do you have, what does your child/loved one want?
- 3. Guardianship: if your child/loved one is nearing 17, begin to evaluate
- 4. Benefits
 - a. SSI & Medicaid
 - b. Medicaid Waivers
 - c. Vocational Rehabilitation
 - d. Community Supports
- 5. Financial: Special Needs Trust, Financial Planning, Able Account
- 6. Person-Centered Planning with Able Transition
- 7. Transition Skill Development: Able Transition Fall Series

Talk with Able: Strategy Call

<https://www.abletransitionconsulting.com/talk-with-able-transition>

Work with Able Transition through our different avenues.

1. Transition Planning: Long-Term or Short-Term
2. Fall Transition Skills Series: 15 Years Old +
3. IEP Power Hour: Let us review your IEP, recommend revisions, feedback and provide you with an IEP educational outline.
4. Hourly Support Services

Questions?

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