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## ABSTRACT

This final report describes achievements and activities of a 3-year federally supported project by the University of North Carolina at Charlotte to develop and deliver semester-long courses for professionals charged with providing transition services to students with disabilities. The project developed four courses and delivered them using distance education technology at the home campus and three partner sites across the state. Each of the project's objectives is addressed. Evaluation results support the project's effectiveness. One-hundred-fifty-six professionals received training through the courses and 45 sets of course materials were disseminated to North Carolina universities and state agencies. This package also contains the course materials for the four courses: (1) "Transition and Life Skills," which explores individualized transition planning, career education and community-based instruction, adult services, and the roles of business and industry; (2) "Community Based Methods," which considers curricula and instructional methods associated with transition and supported employment services, supports, and outcomes for individuals with disabilities; (3) "Interagency Collaboration"; and (4) "Internship." Each course packet includes a sample course syllabus/course assignments, sample lecture notes and PowerPoint slides, and a sample test bank. (DB)

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**North Carolina Transition Services Cooperative Personnel Preparation  
Program  
Final Report**

**End Date  
12/30/2001**

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# U.S. Department of Education GRANT PERFORMANCE REPORT

## COVER SHEET

### 1. Performance Reporting Period

10/1/00 - 12/30/01 (Final Report)

### 2. PR/Award No. (Block 5 on Grant Award Notification)

H325H980028

### 3. Project Title

North Carolina Transition Services  
Cooperative Personnel Preparation Program

### 4. Recipient Information

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Address: 9201 University City Blvd.

City: Charlotte State: NC

Zip+4: 28223-0001

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### 6. Cumulative Expenditures

Federal: \$ \_\_\_\_\_

Non Federal: \$ \_\_\_\_\_

### 7. Annual Certification(s) of IRB approval

Yes \_\_\_\_\_ No

### 8. Authorized Representative Information

To the best of my knowledge and belief, all data in this performance report are true and correct.

Name (Typed or printed) \_\_\_\_\_

E-mail Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

Fax Number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**North Carolina Transition Services Cooperative Personnel Preparation Program**  
**UNC Charlotte Special Education Program**  
(Grant # H325H980028)

**Final Report**

**II. Executive Summary**

In 1998, the Department of Counseling, Special Education and Child Development within the College of Education at the University of North Carolina at Charlotte (UNC Charlotte) was awarded a three-year personnel preparation grant award from the U.S. Department of Education. The grant operated as a collaborative effort between UNC Charlotte, the North Carolina Department of Public Instruction, and the North Carolina Division of Vocational Rehabilitation.

The goal of the project, titled the North Carolina Transition Services Collaborative Personnel Preparation Project, was to provide graduate training to professionals charged with providing transition services to students with disabilities. To accomplish its goal, project staff pursued six objectives throughout the three-year grant period. Briefly, the six objectives were to: 1) Recruit and hire personnel positions; 2) Recruit and select students; 3) Organize distance education technology for home site and partner sites; 4) Develop and finalize curriculum and course materials; 5) Evaluate project activities; and 6) Disseminate project findings, curriculum, and course materials. By the project's close, all proposed objectives had been met and all proposed activities had been completed. The purpose of this **Final Report** is to summarize the objectives, activities, outcomes, and findings of the North Carolina Transition Services Cooperative Personnel Preparation Project.

**Student Recruitment and Training.** The three-year project was designed to operate as two, four-semester phases to enable students to complete a four-course sequence. Phase I began with the Spring semester of 1999, continued with the Summer and the Fall semesters of 1999, and concluded with the Spring semester of 2000. Phase II began with the Summer semester of 2000, continued with the Fall and the Spring semesters of 2001 and concluded with the Summer semester of 2001. A three-month no-cost extension period enabled the project to offer two of the four courses to students at the UNCC site only during the Fall 2001 semester. During each phase, graduate level coursework was provided by the Project Coordinator using an interactive fiber optic network (i.e., NC-REN) combined with on-site instruction and web-based support to students at the UNC Charlotte site and at three partner universities.

The project used innovative student recruitment techniques throughout both phases of the project. Techniques included publishing news briefs in professional publications statewide, advertising during professional conferences and meetings statewide and nationally, and establishing a website with an overview of the project and all necessary application forms ([www.uncc.edu/transition](http://www.uncc.edu/transition)).

Each phase offered a four-course sequence (i.e., Transition and Life Skills, Community-based Instruction, Interagency Collaboration, and Transition Internship). Students were given the option of completing individual courses or the entire sequence.

Students who completed the entire four-course sequence received a Graduate Certificate in Transition and Supported Employment. The grant proposed training 40 different students during each phase (i.e., a total of 80 different students). *By the project's close, 156 different students had been trained, and 34 students had completed the four course certificate program.*

Students were provided stipends to defray the cost of tuition. Interested students submitted a letter of interest including a written statement of their career goals. Individuals who were awarded stipends were required to sign a statement indicating that they agreed to work in a related field for one year for each semester of tuition assistance provided. By the project's close, 149 different students have been provided stipends during each of the two phases.

The project's Advisory Board met during the project's first year to provide input into course content. As a result, the draft course materials that were proposed in the original grant application were refined and expanded. In addition, course materials were continuously revised and updated throughout both phases of the project to reflect legislative changes, emerging research and practices, and newly-published textbooks and other materials.

By the project's close, a set of materials has been developed for each of the four courses. Each set includes a sample syllabus and course assignments, sample lecture notes and Powerpoint slides, and a sample test bank. Appendix A provides a copy of the final materials for each course.

**Distance Education Technology and Partner Sites.** During each phase, the project used distance education technology to offer courses to the home site (UNC Charlotte) and three of the partner sites from across the state. The partner sites during Phase I were North Carolina Central University (NCCU), Western Carolina University (WCU), and the home site at UNCC. The partner sites during Phase II were Elizabeth City State University (ECSU), Fayetteville State University (FSU), University of North Carolina Greensboro (UNCG), and the home site at UNCC. Only UNCC participated during the no-cost extension time period (i.e., distance education technology was not used).

Each site provided an on-site facilitator to oversee local logistics and to problem-solve any difficulties that might arise with the distance education technology. The course instructors (Project Coordinators) traveled to each site throughout the semester teaching at least one course session at each site to enable students to have both satellite and personal access to the instructors. All course materials were either posted on the website ([www.uncc.edu/transition](http://www.uncc.edu/transition)) or mailed to students and were available to them before the class session during which they were addressed.

**Conclusions.** This project enabled UNC Charlotte, which has the only personnel preparation program with a concentration in transition coursework in North Carolina, to provide pre-service and continuing education preparation to professionals across the state who otherwise would not have had access to such coursework. The project resulted in two significant outcomes. First, by providing coursework through the NC-REN Network, the project enhanced accessibility to 156 different interested professionals and subsequently increased the number of qualified transition professionals across the state in

a timely and cost effective manner. Second, 45 sets of course materials (i.e., syllabi, overheads, lecture notes, and test banks) were developed and disseminated to all North Carolina universities and relevant state agencies increasing the capacity of these colleges and universities to offer coursework in the areas of transition.

### III. Project Objectives

#### 1.0 Recruiting and Hiring

- 1.1 Upon notification of funding, the Project Director will advertise for applicants for the graduate assistantship. Recruitment for the secretarial position will also take place. These two positions will be filled during the first three months of the First Project year.**

This goal was completed with the hiring of a project coordinator, Mr. Robert Steele, and a graduate assistant for the project. A secretary within the department was also assigned to work with the Project Coordinator. In year three, Dr Jane Everson assumed responsibilities as Project Coordinator when Mr. Steele took a new grant-funded position within the Special Education Program.

- 1.2 The Project Advisory Board will meet during the Fall, 1998 semester to provide input into course content, assessment, field-based assignments, possible guest speakers, and other resources.**

Upon award of the grant, letters were drafted to the partner sites and the Project Advisory Board members were contacted. A meeting was held with the Advisory Board at UNC Charlotte and broadcast via the NCREN network, April 30, 1999. The meeting covered a review of the current course content of the courses and an evaluation and a revision of the transition methods coursework. Board Members will continue to meet yearly to provide feedback and input into the project. In addition, the Project Coordinator actively worked with the advisory board and individual members of the advisory board throughout the life of the grant.

- 1.3 Within the first three months, the project staff will meet with representatives of each Partner-Site Department of Special Education to identify Facilitators.**

Partner sites were notified and a representative from each department at the partner sites was contacted. Facilitators were identified at each partner site. Meetings were held with each partner site. In addition, the Office of Continuing and Distance Education at UNC Charlotte, assisted with coordinating and registering students at each of the distance education sites.

- 1.4 Partner-Site Facilitators for Cycle I will be hired and trained within**

**the first six project months. Cycle II Facilitators will be hired the semester prior to Cycle II.**

Site facilitators were hired and trained at each site to help coordinate the project.

## **2.0 Student Recruitment and Selection**

**Innovative recruitment strategies will be employed. An objective of the project is to implement, evaluate, and disseminate these recruitment practices so that other, similar programs may benefit. A sample of these recruitment activities is listed below, although we expect to try other alternatives, as well. Using this data, we should be able to identify the most effective recruitment activities.**

Meetings were held with the UNC Charlotte Office of Continuing and Distance Education to determine the most efficient way of disseminating recruitment information. It was decided that this office would handle most recruitment and marketing activities. Additional recruitment was completed by place marketing ads in area newspapers servicing the partner sites.

**2.1.1 Another part of this objective is to recruit students from various disciplines to develop their competence in providing transition services to students with disabilities. Therefore, we will recruit students from social work, rehabilitation counseling, psychology, occupational therapy, and special and vocational education.**

This remained an ongoing objective of the project. Flyers were distributed to relevant departments within the University as well as to the partner sites. A range of individuals was recruited as part of the first cycle. Positions include Special Education Teachers, Regular Education Teachers, Special Populations Coordinators, Transition Coordinators, Workforce Development Educators, Case Managers, and Rehabilitation Professionals in Supported Employment, Mental Health, and Rehabilitation Counseling. See Appendix A for a summary of demographic information.

**2.1.2 In addition the Project will be advertised through the following transition and supported employment related organizations: The Council for Exceptional Children (NC and National); The Association for Persons in Supported Employment (APSE); The North Carolina Vocational Alternatives Task Force; and The North Carolina Transition Council.**



*News briefs* appeared in the following publications:

Bridges, A newsletter from the North Carolina Transition Council  
North Carolina Association for People in Supported Employment  
state newsletter.

Exceptional Children Assistance Center State newsletter.

*Recruitment activities* were held at the following conferences:

North Carolina Community Living Association, Atlantic Beach,  
North Carolina, October, 1998

North Carolina Vocational Alternatives Conference, hosted by the  
NC Association of Persons in Supported Employment, February,  
1999

Council for Exceptional Children International Conference,  
Charlotte, North Carolina, April, 1999

North Carolina Vocational Alternatives Conference, hosted by the  
NC Association of Persons in Supported Employment, February,  
2000

North Carolina Vocational Alternatives Conference, hosted by the  
NC Association of Persons in Supported Employment, February,  
2001

**2.1.3 News releases will be distributed through UNC Charlotte's  
Office of Public Information for use by the news media.**

Information was distributed statewide through the Office of  
Continuing and Distance Education.

**2.1.4 Public service, health agencies, and institutions will be notified  
of the project and their help in recruitment will be solicited.**

The North Carolina Division of Rehabilitation Services was  
contacted and provided information about the Program. The North  
Carolina Department of Public Instruction was also provided  
information. The Division of Vocational Rehabilitation provided a  
mailing list of Supported Employment vendors. The Department of  
Public Instruction provided a mailing list of Vocational Educators  
and Special Educators. Flyers were sent to all vocational educators  
and workforce development professionals on the mailing list.



- 2.1.5 Recruitment information will be routed through North Carolina Department of Public Instruction's (NCDPI), Office of Exceptional Student Education and the NC Transition grant's Newsletter to all secondary level special education personnel.**

This was accomplished through the direct mailing of information provided through the Office of Exceptional Student Education. This was also accomplished through the project advisory board, which included representatives from the North Carolina Department of Public Instruction.

- 2.1.6 Within the first three months, every LEA in North Carolina will receive information about the program (via mail and SpecialNet) and registration application materials.**

Mailings went to all LEA's and directly to vocational and special educators in all counties surrounding the broadcast sites for the scheduled classes. Mailing went out in each phase of the project.

- 2.1.7 During the first three months, special education (SPED) students at the home site (UNC Charlotte) and the Partner-Sites will receive information about the project and registration and application materials.**

This was accomplished through direct mailings to special education teachers at addresses provided by the North Carolina Department of Public Instruction. Additionally information was shared with each partner-site to distribute to special education students.

- 2.1.8 Within the first three months, Project information will be disseminated to Rehabilitation Counselors serving in educational programs and Rehabilitation Counseling personnel around the state through the NC Department of Rehabilitative Services.**

This was accomplished through direct mailings to counselors in Rehabilitation Offices adjacent to the partner sites. Additional information was made available on a state level to rehabilitation counselors through their training coordinator.

- 2.1.9 During the first three months, Project information will be sent to vocational education programs across the state via NCDPI Vocational Education Department (Workforce Development).**

This was accomplished through direct mailings to vocational educators using a mailing list provided by the North Carolina Department of Public Instruction.

- 2.2 Respondent's data will be entered in a computerized d-base to facilitate communication, record keeping, evaluation of respondents, and evaluation of the Project. This will be accomplished by the Project Secretary and supervised by the Project Co-Director (Dr. Test).**

A database was developed and will be updated as additional students participate in the program (see Appendix A). Student demographic information is collected once per semester. Transition activities and outcomes and evaluation data will be measured at the beginning and end of each semester (see Appendix A). Students participating in the second phase of the grant had demographic information entered into the federal database.

- 2.3 Student stipends are to defray the cost of tuition. Prospective students should submit a letter of interest and a written statement explaining their career goals. Individuals awarded the stipend will be required to sign a statement indicating that they agree to work in a related field for on year (for each semester of tuition assistance/two years for two courses) or repay cost of the stipend within one year of completion of the course. Potential students will be notified of this requirement through all course-marketing materials.**

A pre-application/stipend form was created which includes information on the requirements to obtain a stipend. In addition a stipend agreement was created for all stipend recipients to sign. Student stipends were used to cover tuition and related costs for classes.

- 2.4 In October of the first Project year and on an ongoing basis until maximum enrollment is achieved, the Project Co-Director and Project Coordinator will review the formal applications.**

This was accomplished and done throughout the grant. Students applying to the graduate certificate program were required to complete an application to be accepted into the courses offered through the UNC Charlotte Graduate Certificate Program.

- 2.5 By the end of the first six months of the first Project year and on an On-going basis until maximum enrollment is achieved, 40 will be selected to participate and be notified of their selection. If students are not currently enrolled in a degree program they will be directed to**

**and assisted in making immediate application to the appropriate University.**

A total of 156 students have participated in the project and 34 completed the entire four course sequence.

- 2.6 Students will be advised by the Project Coordinator or the Partner-Site Facilitator initially before the beginning of the spring semester of the first Project year and throughout the life of the Project. This advice will include program planning, meeting required timelines, and career guidance.**

To facilitate communication with project participants an in-state, toll-free number (1-888-242-2317) was made available for students to use to contact the Project Coordinator and project staff. The Project Coordinator communicated with the partner-site facilitators on an as needed basis via telephone or fax. Students were able to communicate issues to both the Project Coordinator and the Partner-Site Facilitators. The Project Coordinator was also available to meet individually with the students through visits to each of the partner sites.

### **3.0 Organizational**

- 3.1 Within the first three months, the Project staff will meet with representatives of each Partner-Site Department of Special Education to finalize plans.**

This was accomplished as scheduled.

- 3.2 Within the first three months, studio time will be reserved at UNC Charlotte and each Partner-Site for all classes to be offered for the life of the grant.**

This was accomplished as scheduled.

- 3.3 Meetings will be scheduled between the Project Coordinator and each Partner-Site Facilitator to coincide with the on-site teaching visits.**

Meetings occurred with each site visit. Additional meetings were scheduled as needed to address any issues that arose.

### **4.0 Curriculum/Program Development**

- 4.1 During the first semester of the grant, drafts of course competencies will be further developed based on feedback from the Project Advisory Board mentioned under the earlier "Program**

**Competencies” section, portfolio assessments, and other course assessment strategies will be developed for each course.**

Courses taught are reviewed each year for revision, based on recommendations from the students. Relevant changes are made before the class is taught again.

- 4.2 In December of each project year, Project staff will meet with the Project Advisory Board to review current courses and program offerings or develop and revise portfolio assessment and field-based assignments, and to discuss needed curriculum changes and materials.**

This was accomplished as scheduled.

- 4.3 Based on the recommendations of the Project Advisory Board, student feedback, the Project staff will make appropriate curriculum and/or programmatic modifications.**

Based upon recommendations from the Project Advisory Board, programmatic modifications were made to SPED 6321 for the summer session. Based on feedback from the students, changes were made to SPED 6316.

- 4.4 The Project Coordinator will teach courses, advise students, and supervise interns.**

The Project Coordinator taught all courses as scheduled for the project and supervised the interns for the graduate certificate.

- 4.5 Beginning in the Spring semester of the first project year (1999), one course per semester will be offered, including summer sessions. The schedule will allow students to complete the course study within 4 semesters at which time Phase II will commence.**

Both cycles of coursework were offered as scheduled throughout the grant. In addition SPED 6316 was offered twice to increase opportunity for more students to participate in the project.

- 4.5.1 Class presentations will include a number of multi-media approaches including computer presentations, videotapes, etc.**

Each class incorporated Power Point presentations, Web-based notes, videos, and class activities to include a variety of multi-media approaches within each class module. In addition, a Website for enrolled students in each semester for the first three of the four classes was available for each class as they were offered. Class

sites contained up-to-date information on weekly lectures and assignments.

- 4.5.2 Guest lecturers from across the state will be utilized to offer a broader base of expertise and to address student needs across the diverse geographic regions of the state.**

This approach was used formally in the Interagency and Collaboration Course (SPED 6351). Guest speakers were invited from agencies across the state to address the class. Guest speakers were also used some during the summer classes offered.

- 4.6 Project Staff meet/teleconference once a semester with Representatives from each Partner-Site to monitor the effectiveness of the program.**

This was accomplished as scheduled.

- 4.7 Project Coordinator will develop a University Training Manual for each of the four courses for distribution to all 30 NC IHE special education personnel preparation programs. Each manual will include (a) sample syllabus, (b) test-items, (c) lecture outlines, and (d) disks containing Powerpoint transparencies to accompany lecture materials.**

All four manuals with CD's were distributed to all NC IHEs. See Appendix B.

## **5.0 Evaluation**

- 5.1 During the summer of each Project year, evaluation procedures will be reviewed by the Project Co-Director (Dr. Test) and modified where appropriate.**

This was accomplished as scheduled. See Appendix A.

- 5.2 Evaluation data will be collected as per the Evaluation Design.**

This was accomplished as scheduled. See Appendix A.

- 5.3 Evaluation data will be analyzed during the summer of each Project year by the Project Directors and Project Coordinator.**

This was accomplished as scheduled. See Appendix A.

- 5.4 A yearly evaluation report will be presented to the Project Advisory Board by the Project Directors and Project Coordinator.**

End of year evaluations and yearly activities were shared with the Project Advisory Board.

- 5.4 A data-based file of information regarding special education students will be created during the first Project year. The Project Coordinator will supervise the creation and maintenance of this database file.**

A general database of all students participating in the project was collected and updated each semester of the project.

## **6.0 Dissemination**

- 6.1 In December of each Project year, the Project Co-Directors and Project Coordinator will meet with the Project Advisory Board yearly to discuss findings, program modifications based on those findings, current activities, and future direction.**

This was accomplished as scheduled.

- 6.2 The Project Co-Directors and/or Project coordinator will present papers, workshops, and symposia at national, regional, state, and local conferences regarding the implications of alternative recruitment sources for special education and transition personnel, use of distance education as an instructional alternative for educators working with students with high-incidence disabilities, and the use of portfolio assessment in graduate courses. At the national level, the Project staff will focus on presentations to the Division for Career Development and Transition and the Teacher Education Division because the findings and implications of the Project will have the most impact on other teacher education programs.**

This was accomplished for in-state conferences but not for national conferences.

- 6.3 The Project Coordinator will coordinate the dissemination of Program information through technological networks (e.g., the Internet, SpecialNet). A Home Page/Website will be developed for courses in the certificate program.**

A Website was developed that provided a basic overview of the Graduate Certificate Program and information and forms necessary for application to the program with links provided to the other partner-site Universities. The site now serves as a link to transition information for the North Carolina Transition Council. This site may be accessed at <http://education.uncc.edu/transition>

**6.4 The Project Co-Directors will submit reports to OSERS.**

This was completed for each year of the project.

**6.5 The Project Director will submit reports and other programmatic information to NCPDI and interested LEA's.**

This was completed for each year of the project.

**6.6 The Project Co-Directors will submit reports and other programmatic information to North Carolina's elected state and federal representatives.**

This was completed for each year of the project.

**6.7 The Project Co-Directors and Project Coordinator will submit news releases to the UNC Charlotte Information Office for local, regional, statewide, and national media.**

This was completed for each year of the project.

**6.8 The Project Co-Directors and Project Coordinator will submit manuscripts describing the most innovative aspects of the Project, implications of alternative recruiting sources, use of distance education as an instructional alternative for educators working with students with high-incidence disabilities, portfolio assessment, and evaluative information to appropriate archival professional journals.**

This objective was not met.

#### IV. Budget Information

##### Final Budget Reconciliation

Category	Budget	Current Expenditures	Encumb.	Current Balance
Personnel	\$88,861	\$88,861		0
Fringe Benefits	16,730	16,730		0
Travel	14,012	7,309		6,703
Contracted Serv.	39,856	26,159		13,697
Other: Printing, Communications, EDP Hardware & Software	13,948	10,284		3,664
Supplies	390	289		101



Indirect Costs	14,496	14,009		487
Student Support	66,378	21,802		44,576
<b>TOTAL</b>	<b>\$254,670</b>	<b>\$185,443</b>		<b>\$69,227</b>

**Carryforward Amount Year 2 \$54,677.**

Please note that the excess funds in Student Support were due to a change in tuition costs that occurred after the original proposal was submitted. While we proposed paying a tuition of \$350 per course for 40 students per semester, during the first semester of the grant UNC Charlotte reduced its tuition costs for distance education students to approximately \$175 per student per semester. So, although we funded more students than proposed (156 actual versus 120 proposed), the lower tuition costs over three years resulted in the excess in the Student Support line.

#### **V. Supplemental Information/Changes**

Changes made include: (1) a change in Phase I partner-sites from Western Carolina University to Elizabeth City State University due to low enrollment; (2) a change in Phase I partner-sites from North Carolina Central University to the University of North Carolina Greensboro to allow students from Greensboro, Winston-Salem, and the High Point area to participate in the program; and (3) a change in Course Numbers and Course Titles of the four course sequence-- SPED 6116 was redesignated as SPED 6316 Transitional Life Skills, SPED 5121 was changed to SPED 6321 Community Based Instruction, SPED5151 was redesignated as SPED6351 and SPED 6474 remained the same. These course number and title changes were necessitated by internal changes at University and Department level.

**Appendix A**  
**Project Evaluation Information**

Table 1. Transition Student Demographics – First Course Cycle

	Spring, 99 SPED 6316	Summer, 99 SPED 6321	Summer, 99 SPED 6316	Fall, 99 SPED 6351	Spring, 2000 SPED 6474
1. Course Location					
UNCC	11	15	26	13	5
NCCU	5	6	3	8	6
FSU	14	16	n/a	11	10
ECSU	n/a	2	2	2	2
Total	30	39	31	34	23
2. Gender					
Female	27	35	20	30	20
Male	3	4	11	4	3
3. Age					
21-25	2	2	6	2	0
26-30	5	10	7	9	2
31-35	2	6	6	4	6
36-40	5	3	7	3	8
41-54	15	16	5	15	7
55+	1	2	0	1	0
4. Race					
Caucasian	18	18	18	17	10
African-American	10	17	13	16	12
Asian	1	1	0	0	0
American Indian	1	3	0	1	1
Hispanic	0	0	0	0	0
5. Disability					
Yes	1	5	3	5	2
No	29	34	28	29	21
6. Current Employer					
Stokes County Schools	1	1	2	1	2
Charlotte-Mecklenburg Schools	4	7	7	8	5
Wake County Public Schools	1	2	1	2	2
Chapel Hill/ Carrboro County City Schools	2	2	0	3	0
Person County Schools	1	2	0	0	0
Durham County Schools	1	1	0	2	0
Iredell-Statesville Schools	1	0	0	0	0
UNC Charlotte	1	0	2	2	0
Piedmont Mental Health	1	0	1	0	0
United Cerebral Palsy of NC	1	0	0	0	0
Rowan Cabarrus Cumberland County Schools	1	0	0	0	0
Scotland County Schools	7	6	0	4	2
Robeson County Schools	1	1	0	1	2
Hoke County Schools	4	4	0	2	4
	1	1	0	1	1

Columbus County Schools					
	1	1	0	1	0
Unemployed	1	1	2	0	0
Union County Schools	0	2	2	0	0
Pasoquotank County Schools	0	2	2	2	2
Communication Network Consultants	0	1	1	0	0
Howell Center	0	2	0	1	0
Cabarrus County Schools	0	1	0	0	0
Lexington City Schools	0	1	0	0	0
Cumberland County Mental Health	0	2	0	2	0
Dr. Carlton G. Watkins Center	0	0	1	0	0
Mecklenburg Open Door Services					
	0	2	2	2	2
Davie County Schools	0	0	1	0	0
Cleveland County Schools	0	2	2	0	0
Shelby City Schools	0	1	1	0	0
Rutherford County Schools	0	1	1	0	0
Stanley County Schools	0	1	1	0	1
7. Titles					
Transition Coordinator	2	3	2	3	3
Resource Teacher	1	1	1	1	1
Multi-handicapped Teacher	0	0	0	0	0
Workforce Development/Transition Facilitator	1	1	1	2	1
Autistic Teacher	2	2	0	1	0
Career Prep Teacher	1	1	0	1	1
Transition Specialist	1	0	0	0	0
Graduate Assistant	1	0	2	2	0
Cap MR/DD Case Manager	1	0	1	1	1
FACS Teacher	1	1	0	1	0
Director/ Copymatic	1	0	0	0	0
AISE Lab Instructor	1	0	0	0	0
TMD Teacher	2	1	0	0	1
BED/SC Teacher	3	2	2	3	2
Biology Teacher	0	0	0	0	0
Instructional Specialist	1	1	0	1	1
Case Manager	1	0	0	0	0
Severe & Profound Teacher	1	3	0	1	1
Teacher	3	4	3	1	0
Special Pop Coordinator	1	1	1	1	1
Transition Teacher	1	3	1	2	2
EC Teacher	2	8	11	6	3
SLD Resource	1	0	1	3	0
Job Coach	0	1	3	3	2
Teacher Assistant	0	0	1	0	0
8. Length of Employment					
0-3 years	15	14	24	19	12
4-6 years	5	5	2	4	3
7-9 years	3	2	0	2	2
10-15 years	3	7	5	3	3
15+ years	4	11	0	6	5
9. Current Salary					
\$0 - \$9,999	1	0	3	2	0

\$10,000 - \$14,999	1	1	2	2	0
\$15,000 - \$19,999	2	3	1	0	0
\$20,000 - \$24,999	6	7	12	6	0
\$25,000 - \$29,999	7	14	8	10	10
\$30,000+	13	14	5	14	13
10. Currently employed by a school system					
Yes	24	34	19	27	20
No	6	5	12	7	3
11. School Level					
Preschool	0	0	0	0	0
Elementary	2	4	5	2	0
Middle School	5	7	2	5	2
High School	14	19	9	15	18
Elementary & Middle School	1	0	0	0	0
Middle & High School	1	3	3	3	0
Elem., Middle, & High School	2	1	0	2	0
Preschool, Elem., Middle & High School	0	0	0	0	0
12. Disability Category					
BED					
1-50%	4	3	5	8	4
51-100%	4	6	2	2	2
EMD					
1-50%	9	8	5	7	6
51-100%	4	2	3	2	3
TMD					
1-50%	7	9	4	10	5
51-100%	2	0	1	2	2
LD					
1-50%	6	8	4	2	2
51-100%	5	3	5	4	3
OI					
1-50%	3	0	1	1	1
51-100%	0	0	0	0	0
HI					
1-50%	5	3	3	2	2
51-100%	1	0	0	0	0
VI					
1-50%	3	2	3	2	2
51-100%	0	0	0	0	0
Autistic					
1-50%	5	2	4	2	3
51-100%	2	0	0	0	0
SPD					
1-50%	5	3	0	0	0
51-100%	0	0	0	0	0
Multi-handicapped					
1-50%	5	5	3	6	5
51-100%	2	0	2	4	3
Other Health Impairment					
1-50%	3	5	3	2	2
51-100%	0	0	0	0	0
13. Classroom Type					
Self-Contained	13	21	10	14	19
Resource	4	8	4	8	1
Regular Educational	3	3	0	2	

Setting						0
Other	4	2	5	3		0
14. Currently writing Transition Plans						
Yes	20	27	11	22		20
No	4	7	8	5		0
15. Number of Transition Plans						
1-10	6	19	6	15		19
11-20	7	7	3	6		0
21-30	4	6	1	6		0
31-40	1	0	1	0		1
41-50	0	1	0	0		0
50+	1	2	0	0		0
16. Vocational Options						
School Factories						
1-50%	1	1	0	0		0
51-100%	1	0	0	0		0
On-Campus						
1-50%	5	8	3	4		19
51-100%	5	2	4	4		1
Off Campus CBT (non-paid)						
1-50%	5	4	3	3		5
51-100%	4	3	2	2		0
Off Campus CBT (paid)						
1-50%	3	1	1	3		5
51-100%	0	3	0	3		5
Workforce Development Course						
1-50%	1	3	3	5		12
51-100%	6	8	3	0		0
Own Paid Jobs						
1-50%	2	3	0	3		10
51-100%	0	0	0	0		1
17. Does the school system provide CBT sites						
Vocational Training						
Yes	19	32	17	21		19
No	6	2	2	6		1
Leisure/Recreation						
Yes	12	18	14	19		15
No	13	16	5	8		5
Daily Living Skills						
Yes	11	27	15	22		18
No	14	7	3	5		2
Other						
Yes	2	4	0	2		2
No	23	31	19	25		18
18. Graduation Documents						
High School Diploma						
1-50%	3	2	2	3		1
51-100%	3	6	0	0		0
Certificate of Achievement						
1-50%	4	10	8	12		8
51-100%	2	0	7	5		4
Graduation Certificate						
1-50%	3	9	0	3		2

51-100%	4	7	2	4	5
Alternative (Occupational) Diploma					
1-50%	0	0	0	0	0
51-100%	0	0	0	0	0
19. Graduates employed before or after graduation.					
Before					
1-50%	5	8	6	5	3
51-100%	3	3	1	0	0
After					
1-50%	2	15	8	9	8
51-100%	5	7	4	8	9
20. Graduates pursued post- secondary education.					
4 year					
1-50%	4	6	5	2	1
51-100%	0	2	0	0	0
2 year					
1-50%	3	8	7	4	3
51-100%	0	2	0	0	0
Technical					
1-50%	3	5	4	6	4
51-100%	0	2	0	0	0
Comp. Ed.					
1-50%	3	5	8	6	3
51-100%	0	2	0	0	0



**Transition Student Demographics**  
**Four Course sequence**

	<b>Summer 2000 SPED 6316</b>	<b>Fall 2000 SPED 6321</b>	<b>Spring 2001 SPED 6351</b>	<b>Summer 2001 SPED 6474</b>
<b>Course Location</b>				
UNCC	19	10	7	6
UNCG	4	3	3	3
FSU	6	4	6	5
ECSU	0	4	1	1
<b>Gender</b>				
Female	24	16	12	13
Male	5	5	5	2
<b>Ethnicity</b>				
Caucasian	16	9	7	7
African American	12	9	6	6
Asian	0	1	0	0
American Indian	1	1	1	0
Hispanic	0	1	1	1
<b>Employer</b>				
Newton Conover	2			
Rowan	2			
Char-Meck	3	2	2	2
Lincolnton	2			
Rutherford	1			
Piedmont	1			
Robeson	4	2	3	
Cumberland	2	1	3	3
Caldwell	1	2	2	2
Alamance	2			
Moore	1		1	1
Union	2	1	1	1
RISE	1			
Anson		1	1	1
Kannapolis		1		
Lifespan		1		1
Davie		1		
Educare		1		
Currituck		2		
Roanoke		1	1	1
Elizabeth City		1		
Sellars		1		

Autism Society of NC		1	1	1
<b>Titles</b>				
SE Teach	4	2	5	7
Transition	1	1		
Resid. Supervisor		1	1	1
EC	7	8	5	4
SPD	2	2		
Autistic		1	1	1
Vocational		1		
Fam & Con Science	1	1		
Job Development		1		
ADVP		1	1	1
Substitute	1			
Spec. Pop	1			
Spec. Learn	2			
BED	4			
Facilitator	1			
TMD	1			
EC Inter	1			
Case Manager			1	
Community Based Instruction Support			1	
<b>Length of Employment</b>				
0-3	17	15	7	8
4-6	2	1	1	1
7-9	1	1	1	
10-15	1	2	1	1
15+	5	1	5	4
<b>Current Salary</b>				
0-9999	1			
10-14999				
15-19999				
20-24999	6	4	1	1
25-29999	11	5	5	5
30000+	9	11	9	8
<b>Currently Employed by SS</b>				
Yes	22	15	12	12
No	6	6	3	2
<b>School Level</b>				
Preschool				

Elementary	6		2		2		2	
Middle	5		3		4		5	
High	11		9		7		5	
<b>Disability Categories</b>	1-50	51-100	1-50	51-100	1-50	51-100	1-50	51-100
BED	3	2	6		2	1	1	1
EMD	6	3	4	5	5	2	3	2
TMD	3	2	5	3	2	2	4	2
LD	4	3	8	1	5		3	1
OI	2		4		1			1
HI	2		1		2		1	
VI	1		1		1		1	
AUT			5	1	2		1	1
SPD	2	1	3	1	2		1	1
MULTI	2		2	1	3		2	
<b>Classroom Type</b>								
Self	10		11		9		11	
Resource	4		5		2		1	
Regular	2		1		1		0	
Other	4		2		0		0	
<b>Currently Writing Transition Plans</b>								
Yes	14		11		11		11	
No	7		4		1		1	
<b>Number of Transition Plans</b>								
1-10	4		3		6		7	
11-20	4		6		3		2	
21-30	5							
31-40			1		1		1	
41-50								
51-60					1			
<b>Vocational Options</b>	1-50	51-100	1-50	51-100	1-50	51-100	1-50	51-100
School Factories	1	2	3	2	1	3	1	3
On Campus	6	2	8	1	4	2	5	3
Off Campus non-paid	2	1	5	3	4		3	
Off Campus paid	2		4					
Workforce	1	2		2	1	1		
Own Paid	3		3		2			
<b>Does School System</b>								

<b>Provide for:</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
VT	8	4	14	2	8	3	8	2
L/R	3	8	11	3	6	4	6	4
Daily	7	5	11	2	5	5	5	5
Other	1	4	1	1		3	1	3
<b>Graduation Documents</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>
HSD	1	2	1	1	1	1		
C of A	2	1	3		2		1	
Grad. Cert	4	1	3	3	1		2	
Alternate			1			1		1
<b>Graduates Employed B/A Graduation</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>
Before	3	1	4	2		2		1
After	2	1	3		2		1	
<b>Graduates Pursued Post-Secondary Education</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>	<b>1-50</b>	<b>51-100</b>
4 Year	1		1					
2 Year	2		1		1		1	
Technical	2		2		2		1	
Comp. Education	2		1	1		2		2

	Spring 99		Summer 99		Fall 99		Summer 2000		Fall 2000		Spring 2001	
	SPED 6116 Pre	SPED 6116 Post	SPED 6116 Pre	SPED 6116 Post	SPED 5121 Pre	SPED 5121 Post	SPED 6316 Pre	SPED 6316 Post	SPED 6321 Pre	SPED 6321 Post	SPED 6351 Pre	SPED 6351 Post
1. Use systematic instructional programs	2.7	3.5	1.2	1.4	3.3	3.3	2.1	3.2	2.4	3.7	3.0	3.6
2. Implement behavior management programs	3.1	3.6	3.0	2.4	2.9	3.2	3.5	3.2	2.7	3.0	3.3	3.5
3. Use ecological analyses and situational assessments	2.3	2.6	2.4	2.8	2.3	2.6	3.2	2.7	2.1	2.8	3.0	3.0
4. Access assistive technology services	2.2	2.4	2.4	2.9	1.9	2.1	2.6	2.6	2.2	2.5	2.7	2.7
5. Place individuals with severe and multiple physical disabilities	2.2	2.2	1.9	2.3	1.9	1.9	2.2	2.4	1.4	2.0	1.8	1.8
6. Conduct analysis of community job market	2.5	3.0	1.6	1.8	2.1	2.5	2.4	2.4	2.1	2.2	2.0	3.2
7. Use systematic procedures to keep track of employer contacts	2.1	2.6	1.9	2.9	2.7	2.9	2.5	2.6	1.6	2.2	2.0	2.8
8. Make use of community resources	1.5	2.3	2.1	2.4	2.0	2.2	3.1	3.0	2.0	3.3	1.8	2.4
9. Contact parent/family members to ensure ongoing support	3.2	3.3	1.7	1.8	3.4	3.4	2.2	2.7	2.6	2.6	2.7	3.3
10. Use systematic procedures to transfer supervisory role	2.3	2.6	2.4	2.4	2.5	2.5	3.5	3.5	1.6	3.3	1.8	2.4
11. Work to develop long term career plans	3.1	3.3	2.0	2.4	3.4	3.4	3.4	3.4	2.7	2.7	2.4	3.5
12. Use systematic procedures to follow students	2.0	2.5	2.4	2.7	2.6	2.8	3.0	3.1	1.8	3.5	2.1	3.3
13. Coordinate/Participate in ITP meetings	3.5	3.3	1.9	2.3	3.8	3.8	3.6	3.6	2.7	3.1	3.0	3.7
14. Facilitate active involvement of relevant adult service agency representatives.	2.7	2.8	2.6	2.8	3.0	3.2	3.1	3.2	1.8	2.9	2.3	3.0
15. Work collaboratively to facilitate achievement of outcomes	2.7	3.0	2.2	2.5	3.0	3.2	3.0	3.5	2.4	3.1	2.5	3.0
16. Take specific steps in assisting students to take the lead	3.0	3.3	2.2	3.0	3.6	3.7	3.2	3.6	2.5	1.7	2.5	3.4
17. Use curricular materials to promote successful transition	2.4	3.1	2.1	2.8	3.0	3.5	2.9	3.3	2.8	2.1	2.9	4.0
18. Place individuals with most severe disabilities	1.5	1.8	1.5	1.7	1.7	1.9	2.1	2.1	1.2	1.0	1.5	1.3
19. Participate in training to improve own skills	2.7	3.7	1.7	3.0	3.1	3.2	3.0	3.3	2.1	1.8	3.4	4.4

**Appendix B**  
**Course Packets**

Dear Colleague:

The goal of this course, "*Transition and Life Skills*", is to introduce transition from school to adult life services and supports for students with disabilities. In addition, the course explores individualized transition planning, career education and community-based instruction, adult services, and the roles of business and industry. The goal is to be accomplished through a semester-long course using assigned course readings, guest speakers, lectures, applied in-class activities, quizzes, and practicum experiences with professionals employed in agencies providing community-based transition and supported employment services.

This packet includes a comprehensive set of materials designed to support the teaching of this course. The packet is divided into three sections: (1) a sample course syllabus/course assignments; (2) sample lecture notes and PowerPoint slides; and (3) a sample test bank.



# **TRANSITION AND LIFE SKILLS COURSE**

## **Table of Contents**

1	Course Syllabus/Assignments
2	Lecture 1 What Is Transition?
3	Lecture 2 Transition Planning
4	Lecture 3 School-Based Transition Activities
5	Lecture 4 Workforce Development Education
6	Lecture 5 Interagency Collaboration and Team Meetings
7	Lecture 6 Adult Services
8	Lecture 7 Community-Based Training
9	Lecture 8 Business and Industry Involvement
10	Lecture 9 Vocational Evaluation
11	Sample Test Bank

**Outline and Course Syllabus**  
**for**  
**Transition and Life Skills**

1.0 **Course Rationale and Relationship to Current Programs and Professional Standards:** Persons with mental disabilities are experiencing increased opportunities to work, live, play and learn in the community. Because many of the skills needed to live successfully are not directly taught as traditional academic topics, teaching life skills (e.g. money management, cooking, social skills, job seeking, and work skills) is important for full integration. In addition, teaching these skills often requires teachers to use community-based instruction. This course is designed to introduce students to the methods and procedures that can be used to prepare students with disabilities for adulthood. Particular attention will be paid to preparing students for paid employment in community job settings. This course addresses both NCDPI and additional programmatic competencies.

2.0 **Course Relationship To Conceptual Framework:** This course contributes to developing excellent professionals by focusing on the strands and associated learning outcomes of knowledgeable teachers, effective practitioners, reflective and responsive teachers.

3.0 Course Requirements/Grading

3.1 Four quizzes over reading and lectures

3.2 Interviews

3.3 Transition Plan

3.4 Peer Review of Transition Plan

3.5 Environmental Analyses

3.6 Task Analysis of Specific Skill

3.7 Position Paper

3.8 Grading: Grades will be based on the percentage of total points accumulated by the student. A total of 250 are divided over the following course requirements:

Quizzes	120*
Interviews (4)	40**
Transition Plan (1)	30**
Peer Review of Transition Plan	10***
Environmental Analyses (2)	20**
Task Analysis (1)	20**
Position Paper	10

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Total 250

\*Policy For Make-Up Quizzes: All quizzes must be taken in class at the scheduled time. Being late for class, not coming in order to study for another course, making a doctor's appointment during the class period, your car breaking down or a friend not picking you up are all examples of **non-legitimate reasons** for missing a quiz, and you will not be allowed a make-up. You are responsible for arranging personal schedule accordingly. In the case of a **legitimate, documented** absence, (e.g. illness, death in the family) see the instructor about taking a make-up quiz. The make-up quiz must be completed at the time agreed upon by the instructor and student.

**\*\*Ten percent of the total point value of the assignment will be deducted from the total earned for each week that it is turned in late. An assignment is considered "late" if it is not given to the instructor by the end of the class session in which it is due.**

**\*\*\*There will be no make-up allowed for missing the class in which the peer reviews are completed.**

The following table lists the course grade which will be given as a function of the total number of points earned:

A	=	225 and above
B	=	200 - 224
C	=	175 - 199
D	=	174 and below

### 3.9 Grade of "I":

"The grade of "I" is assigned at the discretion of the instructor when a student who is otherwise passing has not, due to circumstances beyond his/her control, completed all the work in the course. The missing work must be completed during the next semester (fall or spring) in residence, but no later than 12 months after the term in which the "I" is assigned, whichever comes first. If the "I" is not removed during the specified time, a grade of "F", "U" or "N" as appropriate is automatically assigned. The grade of "I" cannot be removed by enrolling again in the same course."

4.0 Written Assignments **Note: Please do not use binders of any type for assignments. All assignments should be stapled and have a cover sheet listing the "Title of the Assignment" and student name.**

- 4.1 Interviews. Each student will conduct a total of **four** (4) interviews with the following individuals: **two** (2) adult service providers, **one** (1) high school teacher conducting transition services or a Transition Coordinator, and **one** (1) high school student receiving transition services (a junior or senior). See Appendix A for more information.
- 4.2 Transition Plan: Each student will be required to write a transition plan. See Appendix B for more detail. The Transition Plan form can be found in Appendix C.
- 4.3 Peer Review of Transition Plan: Each student will conduct a review of a classmate's transition plan. This will be an in-class assignment. See Appendix D for the Review Form. There will be no make-up allowed for this assignment.
- 4.4 Environmental Analyses: Each student will be required to conduct an environmental analysis in the following areas: work skills and leisure skills. See Appendix B for more detail.
- 4.5 Task Analysis: Each student will be required to write a task analysis of **either** a daily living skill **or** a work skill. See Appendix B for more detail.
- 4.6 Position Paper: Each student will be required to write a position paper on "The Importance of Providing Career Development Activities in the Elementary Grades."

Note: Any assignment may be turned in early for a review by the instructor. If a review is desired the assignment must be given to the instructor two (2) full weeks prior to the due date. No extra credit work will be approved since students may take advantage of this early review option.

5.0 Textbook

Aspel, N. (1997). North Carolina Department of Public Instruction Transition Manual. Raleigh, N.C.: NCDPI.

## 6.0 Course Schedule

Date	Topic	Readings
	Overview of Course	
	Introduction To Transition Planning for Transition	Chapters 1 and 2 Chapters 3 and 4
	IDEA and The Transition Plan School-Based Preparation	Chapters 3 and 4 Chapter 7
	School-Based Preparation Occupational Course of Study	Chapter 7
	Quiz #1 (30 points)	
	Workforce Development Education	Chapter 7
	Intra agency and Interagency Coordination	Chapter 5 Position Paper Due
	Adult Services (Part 1)	Chapter 6
	Quiz #2 (30 points)	
	Adult Services (Part 2) Guest Speaker (Tentatively Scheduled)	Chapter 6 Draft of ITP Due (Profile and 1 Domain)
	Community-Based Training	Chapter 8 Interviews Due
	Community-Based Training Task Analysis Practice	Chapter 8 Peer Review of Transition Plan
	Business and Industry	Chapter 9
	No Class (Thanksgiving Break)	
	Quiz #3 (30 points)	Transition Plans Due
	Vocational Evaluation	Chapter 10 Environmental Analyses and Task Analysis Due
	Quiz #4 (30 points) - Final Comprehensive Examination	

## 7.0 Academic Integrity Statement

Students have the responsibility to know and observe the requirements of **The Code of Student Academic Integrity**. This code forbids cheating, fabrication or falsification of information, multiple submission of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor and are binding on the students. Academic evaluations in this course include a judgement that the student's work is free from academic dishonesty of any type; and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who will violate the code can be expelled from the university. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to "F". Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

## 8.0 Course Attendance Policy

Each instructor determines the attendance regulations for his or her own class. Students are expected to attend punctually all scheduled sessions in the courses for which they are registered and are responsible for completing the work from all the class meetings.

Absences from class may be excused by the instructor for personal illness, religious holidays or participation in a pre-approved educationally related activity. Whenever possible, students are expected to seek the permission of the instructor prior to absences.

A student who does not attend the first scheduled meeting of a course may be disenrolled from the course by the department offering the course. At each class period students will sign-in on a class attendance roster.



## Appendix A

### Interview Format

Note: The interview report **must** use the lettered categories as headings. Students should respond to each section under the appropriate heading in narrative format. Points will be deducted for any category not addressed. Each interview report should not exceed two pages.

1. **Adult Service Providers** (should be interviewed first). It is **preferred** that the service providers be from different agencies. They **must** be in different positions. Remember that these are **adult** service providers and must work with individuals with disabilities who are over 18 years of age.
  - A. **Personal Information** (include name, agency, educational and experience background plus a business card or agency letterhead).
  - B. **Description of position and job responsibilities**
  - C. **Services provided by the agency**
  - D. **Coordination with the local school system** on transition and how the agency get involved with students after graduation
  - E. **Problems in the service delivery system**
  - F. **Personal comments**
  
2. **High School teacher doing Transition or Transition Coordinator**
  - A. **Personal Information** (include name, school/address/telephone number, school system, educational and experience background, etc.)
  - B. **Description of job responsibilities** that relate to transition
  - C. **Description of transition services**
  - D. **Coordination with outside adult service agencies**
  - E. **Problems in the delivery of transition services**
  - F. **Personal comments**
  
3. **Secondary student with a disability receiving transition services** (should be a junior or preferably a senior). May involve the student's teacher if the student's disability interferes with communication.
  - A. **Description of student** (not including any confidential information) and brief description of program in which the student is enrolled
  - B. **Post-secondary goals** of student
  - C. **Services** the student is receiving
  - D. **Student's feelings** on how well he/she is being prepared for future goals
  - E. **Student's past involvement** in the transition planning process
  - F. **Personal comments**
  
4. **Due Date:**

## Appendix B

### Transition Plan/Environmental Analyses/Task Analysis/Position Paper

1. Transition Plan (30 points)

1. Identify a student with a disability who is a **sophomore or junior** (or if in an ungraded program one who is **2 or 3 years from exiting** the school system).
2. Develop a **student profile**. This profile should include enough information to determine the appropriateness of the transition plan. Examples of information that should be included are: age, disability, educational setting, past vocational experiences, academic course work, parental involvement, strengths and needs, vocational interests, medical conditions, hobbies, school activity involvement, social skills, community activity involvement, residential desires, financial concerns, and transportation status. The profile should be 1 to 2 pages double-spaced. Please feel free to cover additional information.
3. Write a transition plan. Cover **two years**. Use the form in Appendix C. You will need **four** copies of this form. One for each of the domains.
4. Due date for **draft**: (ONLY one domain and the Student Profile will need to be turned in on this date)
5. Due date for **full plan**:

2. Environmental Analyses (10 points each)

1. **Work Skills**
  - A. Identify five (5) different types of jobs.
  - B. For each job, identify and list at least one (1) possible employer including company name, address and telephone number.
2. **Leisure Skills**
  - A. Identify five (5) leisure/recreational activities.
  - B. For each activity, identify and list at least one (1) possible place these activities can occur. Include name, address and telephone number.
3. Due date:

3. Task Analysis (Do one) (30 points)

1. **Work Skills:** develop one task analysis for a specific job task
2. **Community Living Skills:** develop a task analysis for **one** daily living skill (suggested sites include bowling alley, theater, mall, bus, bank, telephone booth, doctor's office)
3. Due date:

4. Position Paper (10 points)

1. The focus of this paper should be your opinions and views (supported by the literature) concerning the importance of career development activities in the elementary grades.
2. The paper should contain a minimum of **4 references**. **APA style** should be used.
3. The paper should be between **3 to 5 typed**, double-spaced pages in length. A **cover sheet** should be used.
4. Due Date:

## Appendix C

### Individual Plan for Transition

Student Name: \_\_\_\_\_

DOB: \_\_\_\_\_

School: \_\_\_\_\_

Transition Domain: \_\_\_\_\_

Post-Secondary Goal: \_\_\_\_\_

Transition Activities	Responsible Person	Timeline

**Appendix D  
Peer Review  
Due Date:**

Student: \_\_\_\_\_

Peer Reviewer: \_\_\_\_\_

Date: \_\_\_\_\_

**I. Student Description (2 points)**

- Does the description of the student maintain confidentiality? Yes No
- Does the description contain the age, disability, community-based training experience, vocational training, student preference, and other relevant information? Yes No
- Are there any gaps in the information? Yes No
- Is People-First terminology used? Yes No

Comments/Recommendations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. Employment (2 points)**

- Is the goal/outcome identified and does it represent a post-school outcome? Yes No
- Does the list of activities to achieve the Employment goal address all areas of need? Yes No
- Are activities scheduled within an appropriate timeline? Yes No
- Is the person(s) or agency responsible for each activity identified? Yes No

Comment/Recommendations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**III. Education/Training (2 points)**

- Is the goal/outcome identified and does it represent a post-school outcome? Yes No
  - Does the list of activities to achieve the Education/Training goal address all areas of need? Yes No
  - Are the activities scheduled within an appropriate timeline? Yes No
  - Is the person(s) or agency responsible for each activity identified? Yes No
- Comments/Recommendations: \_\_\_\_\_

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**IV. Leisure/Recreation (2 points)**

- Is the goal/outcome identified and does it represent a post-school outcome? Yes No
  - Does the list of activities to achieve the Leisure/Recreation goal address all areas of need? Yes No
  - Are the activities scheduled within an appropriate timeline? Yes No
  - Is the person(s) or agency responsible for each activity identified? Yes No
- Comments/Recommendations: \_\_\_\_\_

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**V. Residential (2 points)**

- Is the goal/outcome identified and does it represent a post-school outcome? Yes No
  - Does the list of activities to achieve the Residential goal address all areas of need? Yes No
  - Are the activities scheduled within an appropriate timeline? Yes No
  - Is the person(s) or agency responsible for each activity identified? Yes No
- Comments/Recommendations: \_\_\_\_\_

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## About the Training Package

The purpose of the training package is to provide materials to preservice and in service teacher educators to help in developing an introductory course about transition from school to adulthood. The training package can also be used to infuse new material into existing coursework or as a foundation for school system in service training. Each training package includes the following materials:

- IBM compatible disks with Power point transparencies
- One sample course syllabus
- Nine sets of lecture materials containing (a) a detailed topic outline, and (b) copies (6 per page) of all transparencies on the disks
- A set of study guides for each lecture
- A bank of test questions from each lecture and a final

### Brief Summary of Lectures

**Lecture 1: Introduction to Transition** - The purpose of this lecture is to introduce students to the factors which led to transition services being mandated as part of the individualized education program for all students with disabilities. Information is included on national post-21 studies, drop-out rates, and associated costs to individuals and society, the evolution of transition, and related rehabilitation, vocational, and special education legislation. The lecture concludes with the most recent (1997 IDEA) definition of transition services.

**Lecture 2: Transition Planning** - The purpose of this lecture is to provide students with the information needed to write the transition component of a student's individualized education program. The lecture describes the major components including stating post-school outcomes, developing transition activities, deciding on responsible persons, and setting timelines. The lecture concludes with a series of case studies that can be used to practice writing the transition component of an individualized education program.

**Lecture 3: School-based Transition Activities** - This lecture introduces students to the concept of career education and the Life Centered Career Education curriculum. Information is also included on restructuring to provide transition services and North Carolina graduation policies. Finally, ideas are presented on how to develop functional curriculum and on-campus vocational training options.

**Lecture 4: Workforce Development Education** - This lecture introduces students to Workforce Development Education (formally called Vocational Education). The lecture provides a history of workforce development education and overviews related to legal/legislative mandates including the Carl Perkins and Applied Technology Act (including Career Development Plans), Tech-Prep, Goals 2000, and the School-to-Work Opportunities Act (including North Carolina's JobReady program). Throughout the lecture information is provided on how special education and workforce development education can be integrated.

**Lecture 5: Interagency Collaboration and Team Meetings** - The purpose of this lecture is to describe the role of interagency collaboration in team meetings for planning transition services. This lecture includes material on types of interagency collaboration, the importance of interagency collaboration, benefits of interagency collaboration, barriers to effective interagency collaboration, and characteristics of effective collaboration. Next, the lecture provides information on guidelines for establishing an interagency transition team and types of teams (including possible members and responsibilities). Finally, the lecture describes a process for holding interagency transition team meetings.

**Lecture 6: Adult Services** - This lecture describes the adult service agencies which can typically be involved in the transition process. Adult services described include Vocational Rehabilitation, Community Rehabilitation Agencies, Mental Health (Developmental Disabilities Division), community colleges, Department of Social Services, Social Security Administration, Employment Security Commission, Workforce Investment Act, and colleges and universities.

**Lecture 7: Community-based Training** - This lecture provides an introduction to issues related to community-based training (CBT). While this lecture includes material on providing CBT for leisure/recreation skills, the focus is on community-based vocational instruction. Information is included on locating CBT sites, staffing and grouping for CBT, transporting students, liability, funding, instructional strategies, and Department of Labor standards.

**Lecture 8: Business and Industry Involvement** - The purpose of this lecture is to help students understand the importance of involving business and industry in providing transition services. Information is presented on what industry is telling schools they need in future employees, current barriers to employment for individuals with disabilities, and what the law says about hiring people with disabilities. The lecture concludes with information that can be used to help students obtain employment.



**Lecture 9: Vocational Evaluation** - This lecture provides an overview of the typical vocational evaluation process including information gathered, steps involved, and how students with disabilities can get a vocational evaluation.

### Using This Training Package

No single training package can provide all the information surrounding the field of transition. Information is multiplying daily and even as this course pack was being written changes were occurring in the areas of Vocational Rehabilitation, supported employment, WIA, welfare reform, IDEA, and the North Carolina Diploma.

All teacher training programs are organized differently and each has its unique set of circumstances that will impact on the way information about transition services will be taught. Therefore, how this package is used will differ from program to program. Regardless of how this package is used it is critically important that the user obtain a copy of the North Carolina Transition Manual to use at the same time. Throughout the training package reference is made to the North Carolina Transition Manual to provide greater detail and information to supplement the topic outline for each lecture.

In addition, the user is encouraged to (1) locate and read all references included in the lecture outlines, and (2) use the transition resources available in your community such as school system and Vocational Rehabilitation personnel. Just as successful transition from school to adulthood cannot occur without interagency collaboration, effective transition teacher education must include interagency collaboration also.

# Lecture 1: What Is Transition?

**Note:** The NC Transition Manual, Appendix A contains a Glossary of Transition terms. Refer to this glossary to assist in understanding many of the terms that will be used during the lectures.

## I. The Scope of Transition

The area of transition seems endless and at times can be overwhelming. There are constantly new strategies, methods, and research being developed. Numerous forms, adult service agency regulations, and laws add to the confusion. But transition is exciting -- it is the justification for the existence of special education.

The concept of transition is deceptively simple:

- A. To help students and their families think about their life after high school and identify long-range goals.
- B. To design the high school experience to ensure that students gain the skills and connections they need to achieve these goals.

## II. (OVERHEAD 2) Problems Faced By Special Education Graduates

There are 250,000 to 300,000 students with disabilities leaving the public school systems in the United States each year. The majority of these young people have cognitive learning problems (average IQ is 79). They also have deficiencies in basic care skills and daily life tasks. Some of the major problems facing Special Education graduates include:

- A. Unemployment/Underemployment
- B. Dependence on governmental services
- C. Dependent living arrangements
- D. Inadequate social skills (low engagement)
- E. Limited recreational opportunities
- F. Discrimination and social stigma (Smith, T., & Puccinni, I.R. (1995) Position statement: Secondary curricular and policy issues for students with mental retardation. Education and Training in Mental Retardation and Developmental Disabilities, 30, 275-282.

Generally, what we see in graduates with disabilities is an overall poorer adjustment to adult life than graduates without disabilities (Edgar and

Pollaway, 1994).

Note the importance of beginning in the elementary grades to prepare students in order to prevent the problems listed above.

**Point of Discussion:** Has anyone ever followed up on their students after they left school? What were the results of your follow-up? Did you find that former EC graduates had adjusted successfully to adult-life?

### III. (OVERHEAD 3) National Post-21 Studies {NC Transition Manual, 6-8}

There have been numerous Post-21 studies conducted to determine the long-range adult outcomes for students with disabilities. The data varies among the studies. The purpose of the next session is to give an overview of what life is like after graduation for many of our special education students. Instead of focusing on the numbers, listen for the overall picture.

#### A. General Population

Information about the general population will allow for a comparison base.

1. National employment rate for graduates without disabilities is 69%.
2. National unemployment rate for those 18 - 24 years of age is 13%.
3. Students without disabilities participate in post-secondary education at a rate of 56%.
4. Graduates without disabilities are more satisfied with their employment and high school education.
5. Graduates without disabilities are active in social or fraternal groups, recreational activities, community activities and have fewer problems with the law.
6. 60% live independently 3 - 5 years after leaving school (The Transition Experiences of Young People With Disabilities: A Summary of Findings from the National Longitudinal Transition Study of Special Education Students (December 1993) SRI International.

**Note:** Following are some additional statistics from Supported Employment Infolines, Vol.9, No.3, April 1998:

There is a significant number of Americans with disabilities.

1. **54 million Americans with disabilities (US Census Bureau Americans with Disabilities Report)**
2. **5.3 million students with disabilities (12.2% of enrolled students).**
3. **16.9 million with a work disability (10.1% of the working age population).**
4. **10.4 million people of working age have a severe work disability.**
5. **51.8% of the 16.9 million people with work disabilities or 8.75 million people are participating in the labor force.**

**B. Employment of youth with disabilities: This is the area where there is widest gap between individuals with disabilities and individuals without disabilities. In general 2 out of 3 unemployed persons with disabilities would prefer to be working. But only 3 in 10 working age (18 - 64) people with disabilities are employed full or part-time, compared to 8 in 10 working age people without disabilities (32% vs. 81%). 57% of youth with disabilities are competitively employed after being out of school 3 - 5 years (Mild MR is 40% and Moderate MR to S/PD is 20%). Only 25% are employed right out of school. The median wage is \$5.72 or less than \$12,000 per year. Five years after graduation, vocational services are still needed by 60% of former special education graduates (with only 1/3 of those needing services actually receiving them). There has been some improvement in the area of employment, 56% of people with disabilities who say they are able to work are working today, compared with 46% in 1986.**

**Finances/Income: 29% of persons with disabilities have household incomes of \$15,000 or less compared with 10% of the general population. When the age group - 18 to 29 - is looked at the gap is only 30% vs. 21% living in households with incomes of less than \$15,000.**

**Transportation: 30% of individuals with disabilities consider transportation to be a problem for them.**

**C. Residential independence for youth with disabilities: Eighty-seven percent are living at home immediately after graduation. Thirty-seven percent in independent residential placements 3 - 5 years after school. Independent living more common among employed youth and those earning higher wages (as well as females since they were more likely to be married).**

- D. Social Domain for youth with disabilities: Rate at which youth belong to groups and see friends declines over time, although social isolation is rare (only 5% of youth saw friends less than weekly, did not belong to any community groups and were not married or engaged - however this rate is 25% for multi-handicapped). People of all ages with disabilities are less likely to go out to eat once a week (40% vs. 59%), less likely to socialize with friends once a week (70% vs. 85%) or attend church (47% vs. 65%). They are also less likely to go to the grocery store, mall, movies, theater, concerts, sporting events, art shows, collector shows and festivals. BUT the outlook is improving for 18 - 29 year olds, with 89% seeing a friend at least once a week and 59% going out to eat at least one time a week.**

**Life Satisfaction: Half as many people with disabilities say that they are satisfied with their life in general, when compared to the general population (33% vs. 77%). In the age group 18 - 29, 44% are satisfied with their life vs. 57% of those without disabilities in the same age range.**

**Discussion Point: In general what do our teenagers and young adults with disabilities do for fun? Are they more involved in passive or dynamic activities? Are they involved in inclusionary activities within the community? What recreational related problems do our young adults with disabilities experience? What are the barriers to recreation?**

- E. Parenting for youth with disabilities: Young women with disabilities were significantly more likely than their non-disabled peers to be mothers (41%), particularly single mothers (20%).**
- F. Post-secondary education for youth with disabilities: Few students with disabilities pursue post-secondary education. Three - five years after high school, fewer than 1/3, less than half the rate of youth in general pursue post-secondary education. Enrollment rates lowest for those with learning disabilities and mental retardation. But youth with disabilities about as likely as other students to enroll in post-secondary vocational schools. Students with sensory impairments enroll at same rate as their non-disabled peers. Success in post-secondary education related to participation in general education classes, expectations for college attendance, and transition plan indicating post-secondary education as a post-school goal.**

**Note: There is wide variance in percentages reported in the literature for post-21 studies (and also for drop-out rates), however, the**

message is clear that students with disabilities do not do as well in adult life as their non-disabled peers.

For more detail about information in this section see:

- **The Transition Experiences of Young People With Disabilities: A Summary of Findings from the National Longitudinal Transition Study of Special Education Students (December 1993)** SRI International (A five year study mandated in 1983 amendments to EHA (ages 3 - 21 in 11 categories). Study began in 1987. Samples done in 1987 and 1990.
- **Statistical Profile of Special Education in the United States. (January 1994) Supplement to Teaching Exceptional Children, 26, 1-4.**
- **U.S. Department of Education, Office of Special Education Programs. (1995). Seventeenth annual report to Congress on the implementation of the Individuals with Disabilities Education Act. Washington, DC: Author.**
- **Wehman, P. (1992). Life beyond the classroom: Transition strategies for young people with disabilities. Baltimore: Paul H. Brookes. (provides specific detail on each disability classification).**
- **Harris Poll: Despite Gains, Only 3 in 10 Working Age People With Disabilities Employed (September 2000). Supported Employment Infolines, V. 11, No. 7.**

**Note:** For information on post-21 studies relevant to North Carolina refer to the NC Transition Manual, 8 - 10.

#### **IV. The Drop-Out Problem {NC Transition Manual, 10-12}**

Students with disabilities who drop-out face even more serious challenges to adjustment to adult-life. The drop-out rate among students with disabilities is a major problem that can be prevented through effective transition services.

##### **A. Drop-out rates:**

**General population: 17% to 24%**

**All disability groups: 39% (15th Annual Report to Congress). 8% drop-out while in middle school. Drop-outs with disabilities rarely go back to school (even if all those who do go back completed their GED, the drop-out rate for youth with disabilities would still be 30%).**

**Learning Disabilities: 22.2% (15th Annual Report to Congress). 38% drop-out rate over seven studies (range 25% to 54%). deBettencourt, et. al. in Follow-up studies of rural LD graduates and drop-outs, Exceptional Children, 56 1, 1989 reported that students with learning disabilities are twice as likely to drop-out than their peers without disabilities.**

**Mental Retardation: 20% (range 8% to 34% based on study). However, students with mild disabilities (particularly EMD) are less likely to complete high school with a diploma or certificate than are any of their peers including both peers without disabilities and those with more moderate to profound disabilities.**

**Emotional/Behavioral Disorders: 47%**

**Additional Drop-out information: Wagner, M. (1991). Drop-outs with disabilities: What do we do? What can we do? Menlo Park: SRI International.**

- B. Students with disabilities often drop-out because the curriculum is inappropriate for their future goals or because they are not going to get a high school diploma.**

**Discussion Point: Have you ever taken a look at the Exceptional Children's enrollment in the 8th grade versus the 12th grade? If so, what did you find?**

- C. (OVERHEAD 4) Characteristics of students who drop-out match the characteristics of many secondary students with disabilities: {NC Transition Manual, 11}**

- 1. Academic failure**
- 2. Low scores on achievement and aptitude tests**
- 3. Low socioeconomic status**
- 4. Little participation in extra-curricular activities (seeing friends outside of school)**
- 5. Attendance problems**

6. Behavior problems
7. Negative attitude toward teachers and school (Walman, C., Bruininks, R. and Thurlow, M.L. Drop-outs and drop-out programs: Implications for special education, Remedial and Special Education, 10 (5), 6-20).

**Note:** Enrollment in "large" schools and lack of parental involvement also negatively impact on drop-out rates.

**Discussion Point:** How many of the above characteristics can be addressed and corrected while the student is still in elementary school? What are some of the strategies that can be used?

## V. Why Should High School Completion Be A Priority?

A. Completing high school is important in order to obtain the skills needed to be successful in adult-life. This is not always the result of a high school diploma but instead the completion of an appropriate program leading ultimately to employment and independent living.

1. **Discussion Points:** What importance is attached to work by society. If you are at a party where you do not know people -- What is one of the first questions you are asked? Is there a hierarchy of careers? Are there careers or jobs in our society that are viewed as more worthy than others? Why do people need to work in our society?
2. **Effect on the economy:** Financial costs. The human and social costs of imposed illness and lifelong dependency are incalculable. Annual cost of dependency is \$45,000. Lifetime cost of dependency is \$2,000,000 per person over an unwilling dependent and idle lifetime (President's Committee on Employment of People with Disabilities, 1990).
3. **Individual cost of unemployment:** Frustration. No opportunity to obtain personal satisfaction, self-worth, and daily challenges. More likely to be segregated. **Discussion Point:** What do you get out of working?
4. **What is the most important outcome of employment:** Productivity? Pay? Self-worth? Integration? Acceptance? Being outside the home? Different outcomes are important to different people.



- B. **(OVERHEAD 5) Unemployment rates: 2 times greater for drop-outs than those who complete high school (TASPP Brief, Vocational Education and the At-Risk Student, 1989). Graduates from high school best their peers who drop-out in percentage employed, growth in employment, percentage working full-time, growth in wages, and higher earnings.**
- C. **Social service costs: Significantly higher (Rumberger, R.W. High School Drop-outs, (1987) Review of Educational Research, 57, 101-121.**
- D. **Crime: 89% of prisoners are high school drop-outs (Institute for Educational Leadership, 1988). The arrest rate for drop-outs is 56% compared to 16% for graduates. 73% of the students labeled BED who drop-out are arrested at least once 3 - 5 years after leaving school.**
- E. **Lost personal income: 230 billion in one year (Catterall, On the social cost of dropping out, High School Journal, 71, 19-30, 1987).**
- F. **Costs of training to businesses/industries: U.S. employers will spend 210 billion to train unskilled workers over the next few years (National Alliance of Business, Business Week, 123-135, 1988).**
- G. **(OVERHEAD 6) Quote: "Individuals who complete high school will earn a lifetime income approximately \$400,000 higher than that of their peers who drop-out." (Martin, Robert, Executive Director of the Center for Workforce Preparation and Quality Education).**

Students receiving job specific career education (workforce development education and work experience programs) are significantly less likely to drop-out, experience better school attendance, are more likely to acquire positive social bonding skills and more likely to have actively involved parents. Tend to perform better at work and in school.

- VI. **(OVERHEAD 7) What's Going On In High School? (Wagner, M. Blackerby, J. & Hebbeler, K. (1993). Beyond the report card: The multiple dimensions of secondary school performance for students with disabilities. Menlo Park, CA: SRI International. (Study commissioned by congress to look at the educational progress of students in special education programs. Initiated in 1987. Study looked at academic course taking and inclusion in addition to the areas listed below).**

**A. Vocational Courses:**

1. **68% of 9th graders and 77% of 10th graders took some vocational courses.**
2. **89% of seniors took at least one vocational course.**
3. **Only 54% of students not assigned a grade level (self-contained) took vocational courses.**
4. **Majority took "survey" vocational courses (77% in 9th grade and 68% in 12th grade). Introductory courses with little specialization are the type of vocational courses in which you are most likely to find students with disabilities enrolled.**

**Discussion Point: Why is the opportunity to "specialize" in a career pathway important to future career success?**

5. **By the end of the high school, only 1 in 3 students with disabilities had taken 4 or more courses in a single vocational area.**

**B. Work Experience Programs**

1. **39% of students with disabilities had some exposure to a work experience program.**
2. **Students with mental retardation (45%) and multiple disabilities (50%) were more likely to participate in work experience programs than students with speech impairments (32%), visual impairments (27%), serious emotional disturbance (30%), and hearing impairments (34%).**

**C. Absenteeism**

1. **Students with disabilities missed an average of 3 weeks of school per year (between 21% and 25% missed 4 weeks or more).**
2. **Students with serious emotional disturbance and other health impairments missed the most school.**
3. **Over 10% of those students who miss 21 - 30 days of school end up dropping out. Twenty-seven percent of those that miss**

30+ days drop-out (Wagner, 1991).

**D. Grade Performance**

1. Students with disabilities that completed high school earned a cumulative grade point average of 2.3.
2. A majority of students with disabilities experience some failure in school - 62% (2/3) failed at least one class at some point.
3. Students fail fewer courses as they move up the grades. Why? Drop-outs? Move to more appropriate curriculum? Less tendency to fail a senior?
4. Students with hearing impairments and orthopedic impairments earned higher GPAs and had a lower course failure rate. While the opposite was true for students with learning disabilities and serious emotional disturbances.

Note: Students who fail one or more courses drop-out at a rate of 17% (Wagner, 1991).

For more information in this area refer to the National Longitudinal Transition Study as referenced earlier.

**VII. (OVERHEAD 8) Predictors For Success**

- A. What should we be encouraging in high school? How does transition provide these things?
1. High school graduation
  2. Paid work experiences while in high school
  3. Specialized vocational training
  4. Good social integration
  5. Lack of behavior problems
  6. Successful school experience (good attendance and passing grades)

**VIII. (OVERHEAD 9) Old Wine In A New Bottle (Halpern, A.S. (1992)  
Transition: Old wine in a new bottles. Exceptional Children. 58, 202-211).  
{NC Transition Manual, 20-21)**

It is evident from the past data on special education graduates, the information concerning the success of special education students while they

are in high school, and the social costs of unemployment that students must be prepared for adult life. Let's look at the evolution of transition.

A. 1960's Cooperative Work-Study Programs

Formal cooperative agreements between local education agencies and Vocational Rehabilitation. Centerpiece - teacher becomes a half-day work coordinator. Focused on secondary students. Flaws included that the funding required VR supervision of LEA teachers (which did not make principals happy). Until P.L. 94-142 work experience was not viewed as a legitimate LEA responsibility which allowed VR to purchase the service.

But student needs did not go away...

B. 1970's Career Education

Started by the U.S. Office of Education as a general education movement. Included seed money. Focused on all ages. Over the years it was adopted by CEC and continued to be seen as a need for students with disabilities. Problems included no set definition (employment vs. adult roles) and seed monies ended.

But student needs did not go away...

C. 1980's Transition

1984: Madeline Will's position paper on transition from the Office of Special Education and Rehabilitative Services (OSERS). Developed the Bridges Model which used high school as the foundation.

(OVERHEAD 10&11) *"Transition is an outcome oriented process encompassing a broad array of services and experiences that lead to employment. Transition is a period that includes high school, the point of graduation, additional post-secondary education or adult services, and the initial years of employment. Transition is a bridge between the security and structure offered by the school and the risk of adult life."* (Will M. (1984) OSERS programming for the transition of youth with disabilities: Bridges from school to working life. Washington: D.C. Office of Special Education and Rehabilitation Services.

**1985: Halpern refocused on adulthood. Community adjustment was the goal. Failure in one area of transition will cause problems in other areas.**

**(OVERHEAD 12) "Transition is a period of floundering that occurs for at least the first several years after leaving school as adolescents attempt to assume a variety of adult roles in their communities." (Halpern, 1992).**

**1990 (OVERHEAD 13) IDEA defines transition services as:**

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

## **IX. Legal/Legislative Context for Transition**

### **A. (OVERHEAD 14) Rehabilitation Legislation**

#### **1. 1973 Rehabilitation Act Amendment**

- a. Section 503: Affirmative action for employment. Businesses and organizations in public sector cannot discriminate in hiring based on race, age, gender.**
- b. Section 504: Civil rights protection, elimination of discrimination for programs receiving federal funds.**

#### **2. 1986 Rehabilitation Act Amendments**

- a. Defined supported employment for Vocational Rehabilitation.**
- b. Added monies directly for providing supported employment services (called Title VI C monies).**

#### **3. 1990 Americans With Disabilities Act (ADA)**

- a. Civil rights protection to individuals with disabilities in private sector employment, all public services, public accommodations, transportation, and**

telecommunications.

**4. 1992 Rehabilitation Act Amendments**

- a. **Changed eligibility requirements for supported employment -- now presumption of ability. Eligibility rates rose from 56.5% in 1992 to 76.5% in 1996.**
- b. **VR counselors can use existing (school) data for eligibility determination (if data is no more than one year old).**
- c. **IWRP must be completed before the student leaves school.**
- d. **Requires active role in transition process.**
- e. **Defines transition same as in IDEA.**

**5. Rehabilitation Act Amendments of 1998**

- a. **Consolidates several employment and training programs into a statewide system of workforce investment partnerships.**
- b. **Expands consumer choice. Option of developing own plan.**
- c. **Renames the IWRP (now the IPE - Individual Plan of Employment).**
- d. **Simplifies eligibility by establishing presumptive eligibility if the applicant is receiving SSI or SSDI and who intend to achieve an employment outcome.**
5. **Increases employment opportunities through telecommunication, self-employment, and small business.**
6. **Provides for linkages to the State Workforce Development System through common definitions, common reporting, cooperative agreements and common outcomes.**

**B. (OVERHEAD 15) Vocational Legislation**

**1. Carl Perkins Legislation (1984 and 1990)**

- a. **Include vocational education services in the IEP.**
- b. **Access to full range of vocational education programs.**
- c. **Provides vocational education in LRE.**
- d. **Targets "special populations"...handicaps,**

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academic/economically disadvantaged, limited English...

e. Will return with more detail later in course.

2. 1994 School-To-Work Opportunities Act

- a. Provide ALL students with opportunity to complete a career major.
- b. Integrate work-based and school-based learning.
- c. Includes a school-based learning component, work-based learning component and a connecting activities component.

C. (OVERHEAD 16) Special Education Legislation

1. P.L. 94-142

- a. LRE
- b. Free, appropriate public education
- c. Due process
- d. Parental involvement
- e. IEPs

2. 1990 Individuals With Disabilities Education Act {NC Transition Manual Appendix D contains PL 101-476}

- a. (GO BACK TO OVERHEAD 13) Defined Transition Services.
- b. Required transition component of IEP by age 16.
- c. Required functional curriculum if needed.

3. 1997: IDEA Reauthorization

- a. Same definition of transition services.
- b. Select course of study by age 14.
- c. Receive instruction in legal rights one year prior to the age of majority (which is 18 in North Carolina).

**Suggested Videos:**

- 1. Moving On. Riley Child Development Center, 708 Barnhill Drive, Indianapolis, Indiana, (317-274-8167). Documents the educational and professional accomplishments of six people with disabilities who have overcome challenges to claim success in their careers or the pursuit of their

goals. (24 minutes)

2. **ADA: Facts and Fears. Part 1: The Act. Cynthia Kay/Wayne Glatz Film & Video, Inc. 214 E. Fulton Grand Rapids, Michigan, 49503 (616-776-0354). Provides a complete overview of the Americans With Disabilities Act in easy to understand terms. (15 minutes)**



**What is Transition?**

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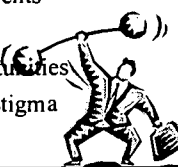
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**Problems Faced by Secondary Students**

- Unemployment/Underemployment
- Dependence on governmental services
- Dependent living arrangements
- Inadequate social skills
- Limited recreational opportunities
- Discrimination and social stigma



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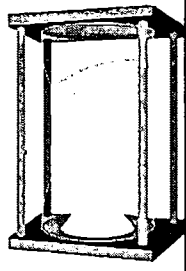
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**Post-21 Studies**

- General Population
- Employment
- Residential Independence
- Social Domain
- Parenting
- Post-Secondary Education
- Specific Categories



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### Characteristics of Drop-Outs

- Academic failure
- Low scores on achievement tests
- Low socioeconomic status
- Little participation in extra-curricular activities
- Attendance and behavior problems
- Negative attitude toward teachers and school

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### Why Should High School Completion Be A Priority?

- Unemployment rates
- Social service costs
- Crime
- Loss personal income
- Cost of training to business/industries



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*Individuals who complete high school will earn a lifetime income approximately \$400,000 higher than that of their peers who drop-out.*



Robert L. Martin, Ex. Director of the Center for Workforce Preparation and Quality Education

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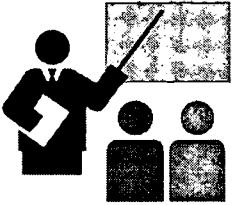
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### What Goes On In High School?

- Vocational Courses
- Work Experience Programs
- Absenteeism
- Grade Performance



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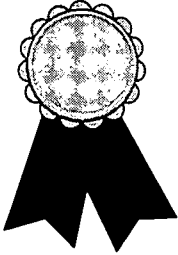
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### Predictors for Success



- High school graduation
- Paid work experiences
- Vocational training
- Social integration
- No behavior problems
- Successful school experience

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### Old Wine In A New Bottle

*1960s Cooperative Work-study programs*

*1970s Career Education*

*1980s Transition*



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**Madeline Will (1984)**

*Transition is an outcome oriented process encompassing a broad array of services and experiences that lead to employment. Transition is a period that includes high school, the point of graduation, additional post-secondary education or adult services, and the initial years of employment. Transition is the bridge between the security and structure offered by the school and the risks of adult life.*

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**OSERS Transition Model  
Bridges**

H I G H  S C H O O L	<---No Special Services--->  <---Time-Limited Services--->  <---On-going Services--->	E M P L O Y M E N T
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**Halpern (1992)**

*Transition is period of floundering that occurs for at least the first several years after leaving school as adolescents attempt to assume a variety of adult roles in their communities.*

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### Transition Services Defined

Transition services are defined as:

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

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### Rehabilitation Legislation

- 1973 Rehabilitation Act Amendments
- 1986 Rehabilitation Act Amendments PL 99-506
- 1990 Americans With Disabilities Act (ADA) PL 101-336
- 1992 Rehabilitation Act Amendments
- Rehabilitation Act Amendments of 1998

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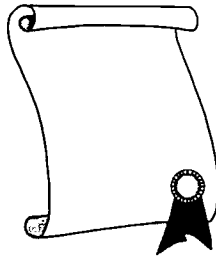
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### Vocational Legislation

- Carl Perkins Legislation
- 1994 School-To-Work Opportunities Act



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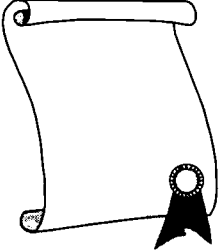
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## Special Education Legislation



- Education for All Handicapped Children  
Act: PL 94-142
- 1990 Individuals with Disabilities Education  
Act: PL 101-476
- 1997 IDEA  
Reauthorization

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## **Lecture 2: Transition Planning**

**Note: IDEA and ADA and the Rehabilitation Act of 1992 synchronized philosophy and policy direction regarding transition.**

- I. (OVERHEAD 2) What Is The Purpose Transition Planning?**
  - A. To help students and their families think about the future and consider what they want to do after graduation.**
  - B. To jointly plan how to make high school relate to their dreams and future goals.**
  - C. To help students and their families make service connections to the agencies they will need help from after graduation. The goal is to insure no interruptions in services.**
  - D. To increase the chances of post-school success. The goal is a quality adult life.**
  
- II. (OVERHEAD 3) Mandated Individualized Education Program Components {NC Transition Manual, 21}**
  - A. Student's present level of performance**
  - B. Annual goals and short-term objectives (or benchmarks) for reaching the goals**
  - C. The specific special education and related services to be provided and the extent of participation in regular education**
  - D. The projected dates for initiation of services and anticipated duration of the services**
  - E. Appropriate objective criteria, evaluation procedures, and schedules for determining, at least annually, whether short-term instructional objectives are being met**

**Note: There are other required items on the Individualized Education Program including how parents will be informed of progress, behavior needs, communication needs, assistive technology needs, and adaptive physical education. Those listed above relate to the goal/objective section of the Individualized Education Program.**

**IDEA regulations maintain the previous components for the Individualized Education Program and adds an additional component for students 14 years and older. This component is the transition component.**

**IDEA provides regulations for three areas of transition:**

1. **The Individualized Education Program**
2. **Agency responsibilities and linkages**
3. **Participation in meetings**

### **III. Age Requirements and The Transition Component of the Individualized Education Program**

**(OVERHEAD 4) Beginning at age 14, and updated annually, a statement of the transition service needs of the child under the applicable components of the child's IEP that focuses on the child's courses of study (such as participation in advanced-placement courses or a vocational education program);**

**Examples of courses of study:**

- **math through algebra II, all industrial arts classes that focus on engineering and technology path with construction fields, job shadowing and possible community work experience.**
- **as many family and consumer science classes as possible to acquire adult living skills, functional math; and community based work experience in health and food service areas.**
- **health occupation path to include courses in science through physics, math through Algebra II college preparatory core, classes and work based learning experiences in medical settings (Their Future...Our Guidance. Iowa Department of Education, April 1998).**
- **the occupational course of study consisting of functional academics, on-campus and off-campus vocational training, and workforce development education courses in the healthcare career pathway.**

**Note: High school students are required to have a 4-year plan of study. This can be attached to the transition plan. These two documents should be coordinated.**

**Beginning at age 16 (or younger, if determined appropriate by the IEP Team), a statement of needed transition services for the child, including, when appropriate, a statement of the interagency responsibilities or any needed linkages.**

**These two requirements - one for students age 14 and one for students age 16 appear similar. According to the Committee on Labor and Human Resources' Report to accompany S. 717 (the report that accompanied the proposed IDEA to congress to explain the intent behind the proposed changes), the purpose of including certain statements for beginning at age**



14:

"is to focus attention on how the child's educational program can be planned to help the child make a successful transition to his or her goals for life after secondary school. This provision is designed to augment, and not replace, the separate transition services requirement, under which children with disabilities beginning no later than age 16 receive transition services..."

**Discussion Point:** Why and when transition planning and the development of a full transition plan would need to occur earlier than age 16 (e.g. students with severe/profound disabilities, high risk of dropping out, waiting lists for adult services, repeated academic failure, lack of maturity). The House Committee on Education and Labor (PL 101-476) House Report No. 101-544, 10, (1990) stated:

"Although this language leaves the final determination of when to initiate transition services under 16 in the IEP process, it nevertheless makes clear that Congress expects consideration to be given to the need for transition services for some students by age 14 and younger. The Committee encourages that approach because of their concern that age 16 may be too late for some students, particularly those students at risk of dropping out and those with the most severe disabilities. Even for students who stay in school until age 18, many will need more than 2 years of transition services." {NC Transition Manual, 24}

#### IV. The Age of Majority

Beginning at least one year before the child reaches the age of majority under State law, a statement that the child has been informed of his or her rights under this title, if any, that will transfer to the child on reaching the age of majority.

- The school shall provide any notice required by this section to both the individual and the parents;
- all other rights accorded to the parents under this part transfer to the child;
- the agency shall notify the individual and the parents of the transfer of rights; and
- all rights accorded to parents under this part transfer to children who are incarcerated in an adult or juvenile Federal, State, or local correctional institution.
- If under State law, a child with a disability who has reached the age of majority under State law, who has not been determined to be incompetent, but who is determined not to have the ability to provide

**informed consent with respect to the educational program of the child, the State shall establish procedures for appointing the parent of the child, or if the parent is not available, another appropriate individual, to represent the educational interests of the child throughout the period of eligibility of the child under this part (Section 615(m))**

**The addition of transition services to the IEP results in the IEP becoming a plan for adulthood. It is a plan to prepare students to live, work, and participate in their community after graduation.**

**IV. The Definition of Transition Services (as defined in IDEA):**

**(OVERHEAD 5) A coordinated set of activities for a student, designed within an outcome oriented process, which promotes movement from school to post-school activities including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living or community participation.**

**(OVERHEAD 6) The coordinated set of activities must:**

- 1) be based upon the individual student's needs;**
- 2) take into account the student's preferences and interests; and**
- 3) include instruction, related services, community experiences, the development of employment and other post-school adult living objectives, and if appropriate, the acquisition of daily living skills and functional vocational evaluation.**

**V. (OVERHEAD 7) The Transition Component of the Individualized Education Program (contains 4 components: Post-school outcomes, activities, responsible persons, and timelines) {NC Transition Manual, 30}**

**A. (OVERHEAD 8) Statement of goals/outcomes in at least 4 areas:**

- 1. Employment (Integrated employment including supported employment)**
- 2. Education/Training (Continuing and adult education/vocational training)**
- 3. Leisure/Recreation (Community participation)**
- 4. Residential (Independent living)**

Although IDEA does not define the coordinated activities, it is clear that the intent is to ensure students have the skills necessary to successfully transition into adult life.

**B. (OVERHEAD 9) List of activities (to achieve outcomes) in areas of: {NC Transition Manual, 22-23}**

- 1. Instruction: Use of formal techniques to impart knowledge. Typically provided in schools but can be provided at other locations and through other strategies or by other agencies (i.e. ABE, specialized tutoring)**
- 2. Related Services: means transportation and such developmental, corrective, and other supportive services as are required to assist a child with a disability to benefit from special education (Note: this activity is not defined in the DPI Transition manual).**
- 3. Community Experiences: Those services provided outside of the school in community settings by the school or other agencies.**
- 4. Employment: Services that lead to a job. Can be provided by the school or other agencies.**
- 5. Post-School Adult Living: Important activities that are done occasionally such as setting up a checking account, registering to vote, doing taxes, buying a car, renting an apartment, etc.**
- 6. Daily Living Skills: Activities adults do every day (e.g. preparing meals, budgeting, maintaining a house, paying bills, washing clothes, buying groceries, etc.)**
- 7. Functional Vocational Evaluation: assessment process that provides information about jobs or other career interests, aptitudes, and skills. It may be gathered through situational assessment, observations or formal measures. It should be practical and can be provided by the schools or other agencies. (Storms, J., DeStefano, L., & O'Leary, E. (1996). Individuals with disabilities act: Transition requirements, a guide for states, districts, schools, and families. Stillwater, OK: Oklahoma State University, National Clearinghouse of Rehabilitation.**

**C. (RETURN TO OVERHEAD 7) Timeline for achieving each activity**

**D. Person/agency responsible for achieving each activity**

**Show different formats for the transition component of the Individualized Education Program. Use plans from local school**

systems and the form suggested for use by NCDPI. Examples can also be found in the NC Transition Manual, Appendices Ha-Hb-Hc.

**VI. Writing the Transition Component of the Individualized Education Program**

**A. (OVERHEAD 10) What is the difference between transition planning and individual education program planning?**

1. The transition component must be developed first. It "drives" the development of the IEP.
2. The transition component focuses on long-term post-secondary outcomes (whereas the IEP focuses on annual goals and short term objectives)
3. Transition planning provides the process by which the desired post-school goals are identified.
4. The transition plan is the blueprint for the future. It should outline the high school experience.
5. Transition planning focuses on communication, collaboration, and coordination of plans, progress, services, supports, and resources.

**When determining what transition services are needed be sure that:**

- the plan specifies the work, educational, residential and recreational outcomes the student desires in life.
- the plan is a result of the planning process and is a true reflection of the student's desires, interests, and preferences.
- the plan is specific to the supports the student will need to achieve outcomes.

**B. (OVERHEADS 11-13) Activity: Give the students a list of Outcomes vs. Activities and have them categorize.**

1. Job shadowing at different community sites (activity)
2. Live in own apartment (outcome)
3. Apply to a community college (activity)
4. Obtain a full-time job (outcome)
5. Investigate employment options (activity)
6. Visit group homes (activity)
7. Get a diploma (activity)
8. Obtain a four year degree from a university (outcome)

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9. Complete leisure/recreation skills training (activity)
10. Participate in a wide variety of recreation activities based on interests with age-appropriate peers (outcome)
11. Learn social skills (activity)
12. Join YMCA (activity)
13. Learn how to budget money (activity)
14. Enroll in a workforce development education course (activity)
15. Learn how to drive (activity)

- C. Give examples of post-school outcome goals in the four domains (e.g. employment, post-secondary education, recreation/leisure, and residential). {NC Transition Manual, 31 and Appendix F}

Activity: Use case studies of various students to allow students practice in developing appropriate post-school outcome goals.

Examples of Case Study:

Case Study #1:

Angie is a rising sophomore, with a primary diagnosis of trainable mental retardation with autistic-like tendencies. Her I.Q. is in the upper TMH range. Angie is enrolled in a local high school which has a special self-contained class for adolescents. Angie has good fine motor skills but her communication skills are limited. Angie uses a combination of verbal and signed speech and is able to clearly make her wants and needs known. Angie's receptive language skills are good, however, communication in a conversational format is difficult. Angie is able to take care of all of her personal needs, but has a difficult time with academic work. She is able to count, identify coins, tell time to the hour, recognize simple survival signs, and write her personal information. Angie's strength is vocational tasks requiring fine motor skills. Angie has a good attention span and produces quality work. She has no behavior problems although when excited she exhibits handflapping and inappropriate verbal noises. Angie enjoys playing with her pets at home (2 dogs and 1 cat) and loves to work very involved puzzles. Angie is involved in a local bowling league sponsored by the Arc.

Angie has expressed an interest in living with her sister after graduation. She likes the idea of working at Mr. Doughnut, Burger King, or Belks (probably because she goes to these places often with her family). Angie helps out around the house by vacuuming, washing the car, and doing the dishes. She can make some simple

foods (e.g. sandwich, soup, baked potato). Angie often complains of headaches. When asked about making choices and decision about her life, Angie reports that her mom tells her what to do. Angie's dream is to be model when she graduates from school.

**Case Study #2:**

Joe is a rising sophomore and is enrolled in his neighborhood high school where he has a good attendance record and has not been involved in any serious behavior incidents. Joe is enrolled in regular academic classes except for one period a day which he spends with a special education teacher for tutoring, assistance with homework, and help in preparing for tests.

Joe has a learning disability in the area of reading. His reading skills and reading comprehension are several grade levels below average, however Joe does quite well when material is presented orally. Joe performs at grade level in the area of math. He has not yet passed the 8th End-Of-Grade test but his teachers feel that he will on his next attempt. Joe's communication skills are good although he is somewhat shy and becomes apprehensive in new situations. He is presently passing all of his courses except World History.

Joe is involved in his local church and participates in church sponsored sports. Joe works during holidays and during the summer at his uncle's service station. He is looking forward to taking Driver's Education and getting his license.

Joe would love to get an apartment after graduation with his best friend. He has expressed an interest in learning more about auto mechanics after graduation. At home he helps with yardwork, dishes, and laundry. He has no money management skills. Joe feels his strongest advocate is his uncle.

Put yourself in Angie's and/or Joe's place and state possible post-school outcomes for employment, residential living, leisure/recreation, and post-secondary education.

- D. Give examples of transition activities appropriate for the four domains (e.g. employment, post-secondary education, recreation/leisure, and residential). {NC Transition Manual, Appendix F}

Using case studies have students develop appropriate transition activities for each post-school outcome.

## **VII. Student Involvement in the Transition Planning Process (IDEA regulations)**

**The local education agency has primary responsibility to organize, initiate, and conduct the transition planning meeting.**

**Participation in the IEP meeting has been expanded by IDEA to include the participation of students 14 years of age and older, parents, and agencies who have transition responsibilities. Student participation will be discussed first.**

**As previously mentioned:**

**The coordinated set of activities must 1) be based upon the individual student's needs and 2) take into account the student's preferences and interests...**

**IDEA also states:**

**(OVERHEAD 14) If the purpose of the meeting is the consideration of transition services for a student, the public agency shall invite the student. The student should receive a separate invitation.**

**If the student does not attend, the public school shall take other steps to ensure that the student's preferences and interests are considered.**

## **VIII. (OVERHEAD 15) How Do You Ensure Student Participation in the Transition Planning Process? {NC Transition Manual 41}**

- A. Invitation to Conference required for student. Must be maintained in EC folder.**
- B. Student Inventories/Surveys (e.g. Student Mapping Forms, Student Dream Sheets) {NC Transition Manual Appendices Ia-Ib-Ic}**
- C. Obtain a commitment from student to be an active participant. The student should be familiar with the IEP/Transition process.**
- D. Ensure that the student understands their strengths, needs, learning styles, and future goals. Assist the student in developing the skills needed to fully articulate these things. Note the importance of self-determination and self-advocacy.**
- E. Ensure that the student understands what is going to happen at the planning meetings. If possible, give the student an opportunity to**

view a transition planning meeting or watch a videotape. Have the student role play participating in a meeting. The ultimate goal should be for the student to "lead" their transition meeting.

- F. Always debrief the student after a planning meeting.

**Note:** Parent involvement in the transition planning process and further information about student involvement will be discussed further in the lectures on interagency coordination and conducting transition team meetings.

**IX. Agency Involvement in the Transition Planning Process {NC Transition Manual 25}**

- A. Given the complexity of transition, a single entity cannot carry the entire responsibility for the planning and delivery of services.
- B. The likelihood of successful transition is increased by the involvement and collaboration of various agencies. IDEA encourages collaboration.
- C. IDEA sets forth the following requirements for agency involvement:

**(OVERHEAD 16)** The public school is required to invite a representative of any agency that is likely to provide or pay for transition services to the IEP meeting when transition services are being considered.

If the agency does not send a representative, the school is required to take steps to obtain their participation in the planning of any transition services.

**(OVERHEAD 17)** If a participating agency fails to provide agreed upon transition services contained in the IEP of a student with a disability, the public agency responsible for the student's education shall, as soon as possible, initiate a meeting for the purpose of identifying alternative strategies to meet the transition objectives and if necessary, revise the student's IEP. The intent is for valuable transition time not to be lost.

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



Schools cannot compel outside agencies to provide services or even attend meetings. Interagency agreements are needed. There needs to be established procedures for exchanging information, eligibility criteria, funding for joint programming and data reporting.

Agency involvement can be encouraged by (1) forwarding plans to outside agencies, (2) having parents and students make contact, (3) maintaining ongoing contact with agency personnel, (4) arranging meetings outside the transition planning meeting with agency personnel.

D. (OVERHEAD 18) Activity: Given a case study, develop outcomes (goals) in each area, activities (at least two), persons responsible, and timelines for each outcome. Then tie one activity to academic long-term and short-term objectives.

E. Pulling It All Together:

1. Get students and parent involved. Help them determine goals.
2. Determine where the student is now in all domains.
3. Determine strategies and activities for achieving goals. Identify priority areas and services needed. Look into the future 2 - 4 years.
4. Determine agency linkages and identify responsible personnel.
5. Determine when services are going to be provided and the duration of these services.
6. Ensure that all parties are in agreement with the plan.

Suggested Videos:

1. The Road You Take Is Yours (1997). Attainment Company (800-327-4269). Helps develop awareness of the importance of decision-making skills. Deals with finding a job, living independently, and getting married. Stresses planning for the future and learning to set goals. (19 minutes)

**Transition Planning**

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**The Purpose of Transition Planning**

- Help students and families think about the future
- Jointly plan the high school experience
- Help students and families make service connections
- Increase chances of post-school success

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**Mandated IEP Components**

1. Present level of performance
2. Annual goals and short term objectives (or benchmarks)
3. Special education, related services, and regular education participation
4. Projected dates for initiation and duration of services
5. Objective criteria, evaluation procedures and schedules for accomplishment of objectives

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### IDEA: IEP Requirements

6. Beginning at age 14, statements that focus on course of study.
7. Beginning no later than age 16 (and at a younger age, if determined appropriate) the IEP must include a statement of needed transition services...
8. Beginning at least one year before the age of majority a statement that student has been informed of rights that begin at age 18.

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### Transition Services Defined

Transition services are defined as:

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

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### Transition Services Defined

- The coordinated set of activities must;
- 1) be based upon the individual student's needs;
  - 2) take into account student's preferences and interests; and
  - 3) include instruction, related services, community experiences, employment and post-secondary adult living objectives, and when needed, acquisition of daily living skills and functional vocational evaluation.

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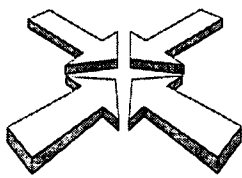
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### Transition Components

- Post-School Outcomes
- Transition Activities
- Timelines
- Responsible Persons




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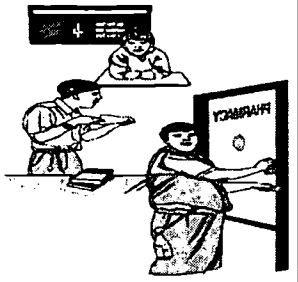
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### Post-School Outcomes

- Employment
- Education/Training
- Leisure/Recreation
- Residential




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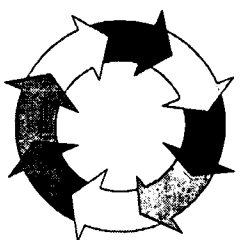
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### Transition Activities



- Instruction
- Related Services
- Comm. Experiences
- Employment
- Post-school Adult Living
- Daily Living Skills
- Functional Vocational Evaluation

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### Differences Between IEP and Transition Planning

- Transition planning drives IEP by focusing on long-term post-secondary outcomes.
- Transition planning provides the process to identify the desired post-secondary goals.
- The Transition Plan is the blueprint for the student's future.
- Focuses on communication, collaboration and coordination.

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### Post-School-Outcome or Activity?

- Job shadowing
- Live in own apartment
- apply to a community college
- obtain a full time job
- Investigate employment options
- visit group homes
- get a diploma

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### Post-School-Outcome or Activity?

- Obtain a four year degree from a University
- Complete leisure/recreation skills training
- Participate in a wide variety of recreation activities based on interests with age-appropriate peers
- learn social skills
- Join YMCA

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### Post-School-Outcome or Activity?

- Learn how to budget money
- Enroll in workforce development education course
- Learn how to drive

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### Student Involvement: IDEA Requirements

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

If the student does not attend, the public school shall take other steps to ensure that the student's preferences and interests are considered.

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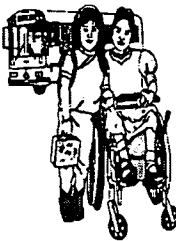
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### Ensuring Student Involvement

1. Student inventories/surveys
2. Commitment
3. Self-awareness
4. Advance preparation
5. Role-playing
6. Video taping
7. Debriefing



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### Agency Involvement: IDEA Requirements

The public school is required to invite a representative of any agency that is likely to provide or pay for transition services to the IEP meeting when transition services are being considered.

If the agency does not send a representative, the school is required to take steps to obtain their participation in the planning of transition services.

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### Agency Involvement: IDEA Requirements

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

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### Writing Transition Plans Activity

- Write outcome for each area.
- Write activities with personnel responsible and timelines for each area.
- Write one related academic long-term and short-term objective.



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## **Lecture 3: School-Based Transition Activities**

### **I. Introduction to School-Based Transition Activities**

In the first two lectures, the basis for the emergence of transition within our field was covered, its justification, and the federal mandates surrounding its implementation. Now, the background you need to put the theoretical and conceptual aspects of transition into practice will be presented.

Many of the activities associated with transition occur at school during school hours -- functional curriculum, academic coursework, Workforce Development Education, on-campus jobs, career counseling, school-based enterprises/school factories, etc. These activities are conducted by a wide variety of school personnel including special education teachers, regular education teachers, workforce development education teachers, guidance counselors, special populations coordinators, and industry education coordinators, etc.

In future lessons we will look at transition activities conducted off-campus and the involvement of personnel from other agencies.

### **II. What is Career Education?**

A. Some heralded Career Education as the "savior" of education, particularly in light of the Excellence in Education reports (criticisms), concern over drop-out rates and inappropriate curriculum (1980s).

#### **B. Definition of Career Education:**

1. (OVERHEAD 2) Hoyt (1975): The process of systematically coordinating all school, family and community components together to facilitate each individual's potential for economic, social, and personal fulfillment and participation in productive work activities that benefit individual or others.
2. (OVERHEAD 3) Brolin (1995): A lifelong process that infuses a careers emphasis in all subjects, grades K-12, including job training, apprenticeships, mentoring, career exploration, and the non-paid work done as a family member, citizen, and leisure seeker.



**There is a good deal of similarity between Career Education and transition - coordination, several parties invested in the process, focus on future goals, beginning the preparation process early, and emphasis on several domains.**

**There has been a definition issue with Career Education - Career vs. Occupation. Career is a broader term that encompasses occupational roles, social roles, leisure roles, and interpersonal roles whereas occupation focuses on employment.**

### **III. (OVERHEAD 4) History of Career Education**

- A. The concept of Career Education was introduced in 1971 by the U.S. Commissioner of Education (Sidney P. Marland). Evolved over the next 15 years. Progressed rapidly through most states during the 1970s and 1980s.**

**1974: Office of Career Education established. Located in the Office of Education. Federal level leadership established.**

**1976: CEC Division of Career Education established. State units started to form in 1980. International conference on Career Development held in 1981. This is now the CEC Division of Career Development and Transition.**

**1977: Career Education Implementation Incentive Act (PL 95-207). Helped states infuse Career Education into curriculum (no longer just considered vocational education).**

**1982: Repeal of Career Education Act (October 1). The Office of Career Education began phasing out. Career Education moved to a block grant (PL 95-207). Intended to be incentive monies. (Brolin, D. (1995). Career education: A functional life skills approach. New Jersey: Prentice Hall, Inc.**

**Note: With the emergence of transition there has been an increased interest in the use of Career Education.**

### **IV. (OVERHEAD 5) Why is Career Education Not Used More Often?**

- A. Many believed implementation of Career Education would require an overhaul of education and this was unrealistic.**
- B. Confusion over the definition of Career Education (confused with vocational education).**

- C. Too many pressures being placed on public schools (this was just one of many).
- D. Change is difficult and there are few rewards for changing. Changes are made with 1) no time off to plan or get ready for the change 2) no recognition 3) no additional funds/staff 4) no extra pay 5) no specialized training.
- E. Lack of conviction that Career Education is any better than what is already being done in the schools.
- F. Teachers believe that they are hired to teach "subjects" or "grade levels."
- G. Career Education makes teachers vulnerable because they have to reveal what they are doing to colleagues, parents, and community representatives. (Brolin, D. (1995). Career education: A functional life skills approach. New Jersey: Prentice Hall, Inc.

V. (OVERHEAD 6) What Are The Goals of Career Education?

- A. To provide career guidance, counseling, and placement services. Helps individuals with career decision-making by providing career awareness and exploration experiences.
- B. To make available the necessary accommodations required to service students with disabilities.
- C. To equip students with skills (employability, adaptability, and promotability).
- D. To infuse career education in the existing curricular from kindergarten to high school. This infusion would result in educational reform through a career emphasis.
- E. To promote partnerships between the private sector and education.
- F. To relate education and work so better choices can be made in both areas.
- G. To make work a meaningful part of an individual's total lifestyle.
- H. To reduce bias and stereotyping and thus protect freedom of choice in the area of lifestyles and careers. (Brolin, D. (1995). Career education: A functional life skills approach. New Jersey: Prentice Hall, Inc.

Career Education has many benefits - increased productivity and independence, improved quality of life (because of the holistic view), requires teachers to learn about the real world of work, opens the doors of the school to the community, gives a purpose to the curriculum, increased motivation and self-determination, and higher retention of academic skills.

VI. How is Career Education Different From Workforce Development Education (Vocational Education)?

- A. Career Education should also not be confused with Life Skills Education, Transitional Programming, Functional Curriculum, or Supported Work (although there are some similarities).**
- B. (OVERHEAD 7) Differences between Career Education and Workforce Development Education:**
- 1. K - 12+ effort. Work attitudes, values, interests, motivation, needs, habits and behaviors develop early and are susceptible to the influence of parents, teachers, peers, and experiences. The School-to-Work Opportunities Act does emphasize a K - 12 effort.**
  - 2. Not a course. An infusion concept. A process of integrating concepts, materials, and experiences into traditional subject matter.**
  - 3. Does not replace traditional education. Requires a refocusing of why and how subject matter is taught. Rethinking is required. Can expand what is already being taught.**
  - 4. Occurs in stages. Elementary: Career Awareness. Middle: Career Exploration. High School: Career Preparation.**
  - 5. Focuses on life skills, affective skills and general employability skills. Life skills are directly related to job functioning. Interest and aptitude in certain life skill areas provides valuable indices of possible job interests.**
  - 6. More coordination between school, home and community.**
- C. Discuss the High Schools That Work program that many N.C. high schools are implementing. Compare it's concept to the infusion concept espoused by Career Education. The Southern Regional Education Board Vocational Education Consortium has established a network of schools and are assisting other schools in restructuring their programs to better educate the "forgotten half", those students who may be classified as vocational-technical students (taking six or more vocational courses). The goal is to prevent students from participating in an unplanned program of study that doesn't prepare them for work or college. High Schools That Work has two major goals: 1) to increase the mathematics, science, and communication achievement of students in general and vocational programs to the national average by the year 2000; and 2) to integrate the basic content of traditional college preparatory studies - English, mathematics, and science - with vocational studies by creating conditions that support school personnel in carrying out nine key practices. These key practices include the integration of vocational and academic concepts, higher expectations, revision of vocational education courses, career counseling to assist students in seeing the relevance of academics to the world of work, etc. For more**

information see: Bottoms, G., Presson, A., @ Johnson, M. (1992). Making high schools work: Through integration of academic and vocational education. Atlanta, GA: Southern Regional Education Board.

## VII. (OVERHEAD 8) What Are The Stages of Career Education?

### A. Stage I: Career Awareness

1. Begins in elementary school and continues.
2. Focuses on attitudes, information and self-understanding.
3. Intended to make students aware of existence of work and how students might "fit-in."
4. Develops initial work-related concepts and values.
5. Develops mobility skills, environmental awareness, and communication skills related to future roles.

Some examples of career awareness activities include:

1. Learning "why" people work.
2. Learning about various careers (e.g. policeman, doctor, fireman, mailman, etc.) and the responsibilities included in various careers.
3. Development of a work personality including a work ethic and understanding of own strengths, interests, and limitations.
4. Development of interpersonal relationship skills.
5. Development of problem-solving skills.

**Discussion Point:** How important is the concept of career education at the elementary level?

1. Elementary students are not ready to make career choices but they can begin to make connections between money and work (e.g. food, clothes, housing) and start thinking about what they can do someday to make money.
2. Elementary students need to understand the wide variety of occupations available in today's workplace.
3. Elementary students need to go beyond learning about just the typical "helping" occupations (e.g. policewoman, fireman, nurse, doctor) and develop an appreciation of working class and service jobs that many people hold (e.g. plumber, electrician, cashier, bus driver, orderly, etc.).

Hoyt (1976) observed, "many of today's youth have not rejected work...rather they have never heard of it."

They have never seen it, touched it, smelled it, or done it. Few of our children grow up as part of a family enterprise, and so don't see their parents working every day."

Secondary school is too late to begin working on the work habits and work behaviors needed by graduates to maintain employment. Elementary school is where the work habits are formed that will be needed later on (e.g. on-task behavior, accepting criticism, punctuality, evaluating own work, etc.). It is also important at an early age to begin early to relate academics to the "real" world. Unfortunately implementation at the elementary level is often hindered because:

1. Elementary students are educated primarily in subjects.
2. It is a common belief that most aspects of occupational development can be delayed until later (e.g. high school).
3. Elementary level special education teachers claim to have little or no training or experience in teaching career education content and skills.
4. Most of the career related and transition skills curriculum guides and materials for teachers focus on current and future needs of high school students (Clark, et.al, 1991).

B. Stage II: Career Exploration

1. Begins in middle school and continues into high school.
2. Allows examination of the student's own set of abilities, interests, needs, the world of work, and the demands of the community.
3. Focuses on development of independent living skills including vocational, domestic living, and recreational skills that enhance ability to participate in an inclusive environment.
4. Focuses on hands-on exploration of broad occupational areas. Designed to help students gain experience both on-campus and off-campus. Students observe and/or try out jobs in simulated environments and gain familiarity with equipment and materials.

Some examples of career exploration activities include:

1. Participation in on-campus jobs or a school factory.
2. Development of physical and manual skills needed to do various jobs.
3. More in-depth investigation of personal interests as they relate to a future career.
4. Participation in civic or volunteer work.

C. Stage III: Career Preparation

1. Begins in elementary school and continues (the high school years are critical).
2. Focuses on career decision-making and the acquisition of skills.
3. Assists in identifying specific interests, aptitudes, and the type of lifestyle that meets those characteristics.

Some examples of career preparation activities include:

1. Participation in paid part-time employment.
2. Development of job-seeking skills (e.g. applications, interviews, etc.).
3. Development of self-advocacy skills.

D. Stage IV: Career Assimilation

1. Transition of student into post-secondary training and community adjustment situations.
2. Many people are involved in this phase.
3. During this stage, students should be prepared to engage in satisfying avocational, family, and volunteer work as well as paid employment.

Some examples of career assimilation activities include:

1. Participation in paid employment (possible supported employment).
2. Interagency coordination aimed at ensuring a smooth transition from school to adult life.
3. Finalizing plans for the accomplishment of post-school goals in all areas.

**VIII. Introduction to the Life Centered Career Education (LCCE)**

Note: A copy of the LCCE for students with mild disabilities should be available for students to review. This section will focus on that version of the

LCCE. Mention the existence of the guidebook for students with moderate disabilities and provide a copy for review by students if possible. Note the similarities and differences in the two versions and their appropriateness for the target populations.

A. Probably the most widely recognized career education curriculum is the Life Centered Career Education (LCCE) developed by Don Brolin and Charles Kokaska. Now widely marketed by CEC. Since it is so widely known and becoming widely used, an overview of the curriculum and its components will be provided.

B. (OVERHEAD 9) The LCCE is designed to prepare students for many career roles including:

1. the work tasks associated with living in a family, being married, raising a family, and living independently;
2. being a good citizen, neighbor, and engaging in civic activities;
3. engaging in avocational activities; and
4. having a paid job.

C. The LCCE is built on the philosophy that:

*"Students who are given an appropriate blend of functional skills with general academic instruction will be motivated to learn the academic and functional skills they need for living and working in their communities."*

**IX. (OVERHEAD 10) Highlights of the Life Centered Career Education (LCCE)**

A. Provides a competency-based approach for learners with disabilities.

B. Focuses on teaching skills that help students become productive workers and effective citizens.

C. Interfaces curriculum areas, school, family, and community experiences and the four stages of career development.

D. Helps students develop a work personality (individual's own unique set of abilities and needs).

- E. Emphasizes the concept of infusion. Career education and competency-based instruction can be infused into most subject areas.
- F. Encourages active partnerships between the school, parents, business/industry and community agencies.
- G. Emphasizes hands-on experiential learning.
- H. Encourages normalization, inclusion, and cooperative learning environments. (Brolin, D. (1995). Career education: A functional life skills approach. New Jersey: Prentice Hall, Inc.
- I. (OVERHEAD 11) Consists of three major curriculum areas:
  - 1. Daily Living Skills
  - 2. Personal-Social Skills
  - 3. Occupational Skills

**X. The Life Centered Career Education Curriculum Areas**

- A. The total curriculum contains 22 competencies and 97 sub-competencies.
- B. Daily Living Skills
  - 1. Consists of 9 competencies and 41 sub-competencies. These competencies should be practiced as early as possible. The high school years should focus on weak areas and not teach from scratch.
  - 2. Daily living skills are important because these skills are necessary for living on own or with family. This category of skills may also lead to increased vocational opportunities (e.g. money, grooming, mobility).
  - 3. (OVERHEAD 12) The nine competencies in the Daily living skills area include:
    - a. Managing personal finance
    - b. Selecting and managing a household
    - c. Caring for personal needs
    - d. Raising children and meeting marriage responsibilities
    - e. Buying/preparing/consuming food



- f. Buying and caring for clothes
- g. Exhibiting responsible citizenship
- h. Use of recreational facilities/managing leisure time
- i. Getting around the community

Note: Provide a few sub-competencies as examples.

### C. Personal-Social Skills

1. Consists of 7 competencies and 28 sub-competences. This area focuses on strategies that encourage students to learn about themselves.
2. These skills help students achieve personal satisfaction and interpersonal achievement because academic, interpersonal, and occupational success is often based on social competency. Personal-social skills are important because a lack of appropriate social skills is often the reason for losing a job.
3. This area should be infused into the regular curriculum. Not taught in isolation as a social skills class.
4. The curriculum advocates the use of several teaching strategies for instruction in this area including: modeling, practice, role playing, incidental teaching, and prompting.
5. (OVERHEAD 13) The seven competencies in the Personal-social skills area include:
  - a. Achieving self-awareness
  - b. Acquiring self-confidence
  - c. Achieving social responsible behavior
  - d. Maintaining good interpersonal skills
  - e. Achieving independence
  - f. Achieving problem-solving skills
  - g. Communicating with others

Note: Provide a few sub-competencies as examples for one or two of the competencies. This area includes self-determination/self-advocacy which will be discussed in more detail later.

D. Occupational Skills

1. This area contains 6 competencies and 28 sub-competencies. The focus is on the abilities needed for job selection, job satisfaction and functional job skills.
2. Suggested strategies for teaching skills in this area include: career counseling (to identify appropriate courses and focus on interests and aptitudes), job analysis, simulation of business/industry, field trips, speakers, career seminars, and job fairs.
3. (OVERHEAD 14) Occupational skills are divided into two sections:
  - a. Career Guidance
    1. Knowing and explaining occupational possibilities
    2. Selecting and planning occupational choices
    3. Seeking, securing, and maintaining employment
  - b. Career Preparation
    1. Exhibiting appropriate work habits
    2. Evaluating efficient physical-manual skills
    3. Obtaining a specific occupational skill

Note: Provide examples of sub-competencies.

XI. (OVERHEAD 15) **Life Centered Career Education Curriculum Materials** (Have a copy of the SEC catalogue for ordering information).

A. Basic Curriculum Guide

1. Provides information about building a systematic and comprehensive effort for infusing the 97 competencies into academic subjects.
2. Provides background on career education and the LCCE model.

3. Presents a set of 97 sub-competency units with instructional objectives, suggested activities, and adult/peer instructional roles for supportive assistance.

B. Competency and Instructional Units

1. Over 1000 lesson plans addressing each of the 400 objectives (Daily Living Skills - 472, Personal-Social Skills - 370, Occupational Skills - 286)
2. Written to address the 3 areas of career education (career awareness, career exploration and career preparation).
3. Written to provide instruction in the home, school, and community.
4. Written to span 5 career roles: family member, citizen, volunteer, employee, and leisure seeker.
5. Each competency unit contains:
  - a. Objectives: Includes suggestions for the sequencing of performance objectives for a specific sub-competency. While objectives are arranged in a logical order (they can be changed).
  - b. Activities/Strategies: There is some thought to the order of difficulty. Utilization of community personnel to provide instructional activities is encouraged.
  - c. Adult/Peer Roles: Includes adult roles, sources of information from a career perspective, parental roles, and peer roles (siblings, regular education students, and fellow students from same class).

C. Competency Assessment Batteries

1. Primarily a screening instrument.

Addresses career education knowledge of 7th - 12th grade students with disabilities.

2. Three competency assessment batteries:
  - a. Knowledge Battery: two forms with 200 multiple choice questions covering the first 20 competencies.
  - b. Performance Battery: covers all competencies (except "gaining occupational skills"). Each test has five questions that require the student to demonstrate application of a sub-competency area by responding in writing or verbally to questions that reflect competency.
  - c. Self-Determination scale: a 40 item self-report that reflects the student's level of self-determination.

XII. **Restructuring at the Secondary Level for the Provision of Transition Activities** {NC Transition Manual, 117-121 (provides steps involved in restructuring) }

High schools have traditionally been structured around a modified standard course of study framework. Program restructuring is often needed to ensure the inclusion of transition activities. Restructuring can take many forms but the final outcome should be an array of curricular options appropriate for students with a wide variety of post-school goals. North Carolina high schools are restructuring for the implementation of the Occupational Course of Study.

Note: This section also ties into the discussions on School-To-Work later on.

"Restructuring a school is quite similar to learning to drive on the left side of the road, after you've driven on the right side your whole life" (Detours on the Road to Site-based Management).

- A. (OVERHEAD 16) Why is there a need to restructure?

1. The traditional organization of the high school has served to limit the alternatives offered to students with disabilities.
2. Many students with disabilities are not receiving appropriate vocational education services.
3. There is a lack of academic and vocational education integration that assists students in understanding how to apply skills to the world of work.
4. (OVERHEAD 17) *"Today's schools are structured in almost the same way as were the schools of our parent and grandparents. It has been said that if Rip Van Winkle awoke today the only thing he would recognize would be the public school system."*
5. (OVERHEAD 18) As puzzle pieces are only fragments, so are subjects in our middle and high schools -- each subject is taught by a different teacher, in a different room, with different terminology, and each subject is seen as an entity of its own. Elementary schools are not quite so bad, there is no changing of rooms, but the teacher says, *"Now put away the math book and get out the science book."* We seldom show how all the "pieces" can be put together to reveal the "big picture."

- B. (OVERHEAD 19) Is the emphasis on a baccalaureate degree right for all students (particularly those with disabilities)?

Note: This section provides some justification for offering an alternate course of study for students with disabilities that focuses on options other than post-secondary education.

Note: For detail on this section see *School-To-Work: A Model for Learning A Living* by Michael Hartoonian and Richard Van Scotter in Phi Delta Kappan, April 1996 and *Still the Forgotten Half After All These Years* by Ralph C. Wenrick in Phi Delta Kappan, April 1996.

1. More than half of our 18 year olds do not have the knowledge or skills to find or keep a good job (William E. Brock, Secretary's Commission on Achieving Necessary Skills, U.S. Department of Labor).

2. In most American high schools the majority of administrative and teaching time is focused on college-bound students. The result is that students have little opportunity to participate in vocational education.

"For ½ of American youth, college serves as a bridge between secondary school and a career path. But for the non-bound college youth, the bridge between secondary school and a career is frequently unemployment. These are the Forgotten Half" (Elizabeth Dole).

3. There is an "only one way to win" in the game of life mentality in our schools -- that a four year degree is the only route for success. However, one third of the students who follow this road will end up in jobs they could have gotten without a four year college degree.

4. (OVERHEAD 20) The push to get a baccalaureate degree is based on four myths:

a. That most students graduate prepared to do legitimate college level work however:

- only 47% have taken three years of science
- only 37% scored at level 3 or above on the National Assessment of Educational Progress in reading.
- only 20% of professors feel freshman have the needed written and oral communication skills and only 15% feel that freshman are prepared in math.
- Colleges are being used to

- "weed out."
- 90% of all private and 95% of all public four-year colleges have remedial classes taken by 40% to 70% of all freshman.
  - Even in the most elite schools, only 1/3 of the graduates graduate with everything they need to be successful in college.
  - There are more colleges and universities today than ever in our history.
- b. That most of those who begin a four year college program will graduate. Only 26% graduate from four year colleges (70% of 1992 high school graduates enrolled in college).
- c. Most college graduates will find better jobs when in fact most of those who graduate will find jobs that they could have obtained without a degree:
- Since 1950s (remaining constant and predicted to stay so) 30% of all jobs have required a BA and 20% of all employment is professional.
  - The Department of Labor predicts that through the year 2005, at least 1/3 of all BA graduates will not find employment commensurate with their education.
  - In virtually all areas (except medicine) by the graduates exceed employment opportunities by 50%.
- d. That the whole process is benign, meaning individuals do not get hurt in the process even if they fail. However since 1980, student have defaulted on 19.2 billion dollars in guaranteed federal loans. Only 52% of the unprepared who went to college returned as sophomores -

65% of those not returning had received financial aid.

5. (OVERHEAD 21) The times have changed. In 1982 only 20% of students in the lowest academic quartile were encouraged to go to a four year college. In 1992 the figure was 60%. There has been a huge increase in "reverse transfers" - individuals who hold four year and even graduate degrees who enroll in one or two year certificate/associate degree programs. In California, the problem became so bad that students who already had degrees were charged more tuition at the community college in an effort to hold spaces for those without degrees.
6. The Department of Labor has concluded that the lifetime earnings of individuals who work in such occupations as precision metals, the crafts, specialized repair and other nonprofessional technical occupations will exceed earnings of all college graduates save for those who find jobs in the professional or managerial fields.
7. We are not responding to the needs of employers or the majority of America's young people who will not go to college. Despite the fact that 82 million U.S. jobs don't require a college degree, our entire education system is geared to those students who will be attending traditional, four-year institutions -- to the white-collar work-force. Somewhere along the way, we lost respect for the skills we now so desperately need in our factories and on the front lines of our service industries (William Kolberg, President and CEO, National Alliance of Business). And to top it all off, the United States annually admits over 25,000 workers who have technical skills.

XIII. **The North Carolina High School Diploma**  
Now, let's look at what is required in North



Carolina to obtain a North Carolina high school diploma. As graduation standards have been raised, increasing numbers of students with disabilities have failed to meet the requirements for the high school diploma that was offered in previous years.

We will also take a look at the types of state sanctioned exit documents that are available to graduates.

A. (OVERHEAD 22) N.C. High School Graduation Requirements

1. Career Course of Study

- a. English (4 courses)
- b. Mathematics (3 courses including Algebra I)
- c. Science (3 courses including Biology and Physical Science) Note: Freshman entering school 2000/2001 must take an earth/environmental science as third science requirement.
- d. Social Studies (3 courses including Government/Economics, US History, World Studies)
- e. Computer Skills (students must demonstrate proficiency through state testing - to begin with graduating class of 2001)
- f. Health/PE (one course)
- g. Career/Technical (4 courses appropriate for selected career pathway or major)
- h. Arts Education and Foreign Language (not required)
- i. Electives (additional electives included to meet local graduation requirements)
- j. Must have proficiency on Exit Exam

Note: The Algebra requirement is waived for students who have a documented learning disability in the area of math for all courses of study. The Algebra I requirement is based on a "common outcome" philosophy. This philosophy espouses the belief that all students should meet a preestablished level of competence in order to be considered

successful.

Discussion Point: Is common outcome philosophy appropriate for all students with disabilities.

2. College Tech-Prep Course of Study

- a. English (4 courses)
- b. Mathematics (3 courses including Algebra I, Geometry and Algebra II or Algebra I and Technical Math I and II)
- c. Science (3 courses including a physical science course related to a career pathway, Biology and another science course related to career pathway) Note: Freshman entering school 2000/2001 must take an Earth/Environmental Science as their third science requirement.
- d. Social Studies (3 courses including Government/Economics, US History, World Studies)
- e. Computer Skills (students must demonstrate proficiency through state testing - to begin with graduating class of 2001)
- f. Health/PE (one course)
- g. Career/Technical (4 courses appropriate for chosen career pathway)
- h. Arts Education (not required)
- i. Electives (Additional electives to meet local graduation requirements)
- j. Must have proficiency on Exit Exam

3. College Prep Course of Study (UNC 4 Year College Requirements)

- a. English (4 courses)
- b. Mathematics (3 courses to include Algebra I, Algebra II, Geometry (or higher level course for Algebra II is a prerequisite). Recommended one course unit in 12th grade)
- c. Science (3 courses including a Physical Science, Biology, and at least one laboratory course) Note: Freshman entering school 2000/2001

- must take an Earth/Environmental Science as their third science requirement.
- d. Social Studies (3 courses for NC Diploma including US History, and one elective such as ELPS or World Studies)
  - e. Foreign Language (not required but 2 courses are recommended with one course unit taken in the 12th grade)
  - f. Computer Skills (Students must demonstrate proficiency through state testing beginning with the graduating class of 2001)
  - g. Health/PE (one course)
  - h. Career/Technical (not required)
  - i. Arts Education (not required)
  - j. Electives (additional electives to meet local graduation requirements)
  - k. Must demonstrate proficiency on exit exam.

Note: For the above courses of study the following courses may be taken prior to Grade 9 if the courses meet certain requirements: Algebra I and II, Geometry, Advanced Math, Technical Math I and II, English I, Biology, ELPS, US History, and World Studies.

- 4. Occupational Course of Study - this Diploma is only available to certain students with disabilities having an Individualized Education Program. This course of study is being implemented with the Freshman class of 2000 with the first diplomas earned through this course of study awarded in the year 2004.
  - a. English (4 credits of Occupational English)
  - b. Mathematics (3 credits of Occupational Math)
  - c. Science (2 credits of Life Science)
  - d. Social Studies (2 credits covering Government/US History, Self-Determination)
  - e. Computer Skills (Proficiency as specified by the IEP)

- f. Health/PE (one credit)
- g. Career/Technical (4 credits in Workforce Development Education)
- 8. Occupational Preparation (6 credits including 300 hours of school-based training, 240 hours of community-based training, and 360 hours of paid employment)
- i. Arts Education (recommend at least one credit in an arts discipline and/or requirement by local decision)
- i. Electives (local decision)
- j. Students must meet IEP objectives - no exit exam.
- 11. Completion of a career portfolio required.

B. (OVERHEAD 23) Types of Graduation Documents  
 {NC Transition Manual, 105-106}

1. North Carolina High School Diploma

- In order to graduate with a high school diploma, students must successfully complete one of the four courses of study approved by the State Board of Education.

2. Certificate of Achievement

- Students who complete the state and local graduation requirements but who fail to reach Level III performance on Grade 8 end-of-grade test receive a Certificate of Achievement and shall be allowed to participate in graduation exercises.

3. Graduation Certificate

- Exceptional students who do not meet the requirements for a N.C. high school diploma will receive a Graduation Certificate and participate in graduation exercises if they:

- a. successfully complete 20

- course units by general subject areas, and
- b. successfully complete all IEP requirements.

"Much of that you learn today won't be true five years from now. Many things you haven't heard of today will be important 5 - 10 years ahead. If I teach you something supposedly "relevant", I'm guaranteeing relevance. If I teach you how to work, to have a good attitude, to take responsibility for your own ideas, to communicate and to think a problem through, no matter what subject matter I use in order to get those basic skills of mind and intellect across, then I'm giving you something you can use for a very long time. Those skills will never change...the stakes are for a lifetime" (Jacob Neusner).

#### XIV. Approaches to Academics at the Secondary Level

- A. The traditional organization of high schools is along academic departmental and subject lines. The fully academic focus is inappropriate for some students with disabilities.
- B. Individual student needs should determine the approach to instruction for students at the secondary level. Edgar and Polloway (1994) noted that the key to success and a primary programming consideration for adolescents with disabilities is the availability of curricular options.
- C. (OVERHEAD 24) The three primary approaches to teaching students with disabilities used in high schools include: {NC Transition Manual, 104}
  1. Remedial: generally used with students labeled as having learning disabilities, behavioral-emotional handicaps, sensory handicaps or physical disabilities. The focus is on improving basic academic skills in order to increase the chances of success in the standard course of study. Emphasis is on reading, math, and communication.

2. Maintenance: Tutorial in nature. Emphasis is on supporting students with disabilities in general education. Students are exposed to learning strategies - providing the skills needed to succeed in regular curriculum (e.g. test-taking skills, note-taking skills, report writing, etc.).
3. Functional/Adult Outcomes: Used primarily with students who are labeled mentally handicapped. Emphasizes the practical application of functional skills. Focuses on preparing students with disabilities for roles as producers of good, citizens, and consumers. (Smith, T. Puccinni, I.R. (1995). Position statement: Secondary curricula and policy issues for students with mental retardation. Education and Training in Mental Retardation and Developmental Disabilities. 30, 275-282.

Note: Halpern, A.S., & Benz, M.R. (1987). A Statewide Examination of Secondary Special Education for Students with Mild Disabilities by Exceptional Children, 54, 122-129, reported the results of parent surveys seeking to determine the numbers of students with disabilities utilizing various functional activities at the secondary level. The results were as follows:

- 47% utilization of vocational education
- 24% utilization of a community-living skills curriculum
- 17% utilization of in-school worksites
- 93% utilization of a traditional academic program

#### XV. Functional Curriculum

One of the main considerations in restructuring a school program is to ensure that students are adequately prepared for adult life is the development/adoption of a functional curriculum. A functional curriculum is often the appropriate alternative curriculum for students who do not plan to pursue post-secondary education. Using parts of a functional curriculum is also

appropriate for supplementing the instruction of a student who is pursuing an academic type diploma in order to ensure that he or she has the independent living skills needed to function in the community as a productive member after graduation.

A. (OVERHEAD 25) Guidelines for curriculum development or to consider when adopting or adapting a commercially available curriculum. {NC Transition Manual, 108}

1. Community referenced/functionality

- a. Skills should focus on basic demands of adult life.
- b. Skills should be included that are frequently demanded in the student's natural environment (both now and in the future).
- c. Requires using real materials and independent performance at some level.

2. Integrated (as both a practice and goal)

- a. Preparation for working and living in settings with persons with normal needs.
- b. Requires knowing the demands/expectations of potential environments.

3. Longitudinal

- a. The curriculum should be sequenced so that skills are in a student's repertoire by the time they leave school.

4. Community-Based

- a. Major characteristic of the students with mental retardation is the inability to generalize.
- b. The curriculum should require that as the student progresses through the program more and more instruction should take place in the community.

- B. (OVERHEAD 26) Problems In Providing a Functional Curriculum (particularly when desiring inclusion) from Edgar, E. (1987). Secondary programs in special education -- Are many of them justifiable? Exceptional Children, 52, 555-561.

Discussion Points:

1. If regular education's primary concern is that a minimum level of academic competency be the stated outcome for ALL students and if this results in policies and procedures dictating that ALL students in the regular education program be educated to that end, then career development may be neglected even if this is a critical outcome for SOME students.
2. If special education's role is to be one of a facilitator within regular education for accomplishing regular education's academic goals, a curriculum that provides direct instruction in functional career development becomes difficult (and in some cases) impossible to carry out.
3. Curriculum differentiation is most often associated with segregated, self-contained settings. If the only way that curriculum differentiation can effectively occur is through segregation then the field of special education has a dilemma in meeting the transition needs of some students.
4. ..."two equally appalling alternatives - integrated mainstreaming in a nonfunctional curriculum ... or separate, segregated programs for an already devalued group, a repugnant thought in our democratic society."
5. General education is moving toward a more rigorous academic model. The ABC model, effective schools and outcome-based education are all focused on



higher achievement scores in the traditional subject areas. Higher order thinking skills and problem solving are also being emphasized. **However** some educators are viewing outcome-based education as also advocating functional, generalizable skills for responsible citizenship as the end and the academic skills as the means to that end. **This view provides a "window of opportunity" for functional curriculum.** Also the recent vocational movements...

XVII. **North Carolina Occupational Course of Study**

1. (OVERHEAD 27) The N.C. Course of Study is aligned with the N.C. Standard Course of Study, the School-To-Work-Opportunities Act (JobReady), the SCANS Skills, Career Education, Career Development, and the Elements of Work Ethic.
2. (OVERHEAD 28) The following assumptions are the foundation of the N.C. Course of Study:
  4. Vocational assessment is important to career decision-making.
  5. Experiential hands-on learning is an important need for students with disabilities.
  6. Self-determination is vital to successful transition planning and the obtainment of competitive employment.
  7. The application of functional academics to work settings is important to future career success.
  8. Interagency cooperation is needed for successful career development.
  9. Students should spend increasing amounts of time in the community as they approach graduation.
  10. Students who have paid work experience prior to graduation are more likely to obtain paid employment after graduation.
3. Content of the N.C. Occupational Course of Study (Have the Occupational Course of Study available for this section so examples of specific objectives under each competency can be provided)

11. (OVERHEAD 29) Occupational English Competencies
  1. Functional Reading
  2. Written Language
  3. Expressive Communication
  4. Receptive Communication
  5. Media and Technology
  
12. (OVERHEAD 30) Occupational Math Competencies
  1. Computation
  2. Financial Management
  3. Time
  4. Measurement
  5. Independent Living
  6. Technology
  
13. (OVERHEAD 31) Occupational Preparation Competencies
  1. Self-Determination
  2. Career Development
  3. Job-Seeking Skills
  4. Work Behaviors, Habits, and Skills in Personal Management
  5. Work Behaviors, Habits, and Skills in Job Performance
  6. Interpersonal Relationship Skills
  
14. (OVERHEAD 32) School-Based Training Activities (300 hours required)
  1. Vocational assessment activities
  2. School factories
  3. School-based work enterprises (small businesses)
  4. WFDE hands-On experiences
  5. Job fairs
  6. VR work adjustment
  7. Job clubs
  
15. (OVERHEAD 33) Work-Based Training Activities (240 hours required)

Note: These activities will be discussed in much greater detail in the lecture on off-campus activities.

1. Community-based training (enclaves,

- mobile work crews)
  - 2. Situational assessment
  - 3. Internships (WIA or WFDE)
  - 4. Job Shadowing
  - 5. Apprenticeships
  - 6. Co-Op programs
  - 7. Part-time employment
  - 8. Legitimate volunteer work
  - 9. Community service projects
16. (OVERHEAD 34) Paid Competitive Employment (360 hours required)
- 1. Student will obtain and maintain a competitive employment position in an integrated community setting at or above minimum wage (with or without supported employment) in chosen career pathway.
  - 2. This requirement synthesizes and applies all skill areas learned in courses.

**XVI. Sample Commercial Functional Skills Curricula**

(Discuss these as supplements to the N.C. Occupational Course of Study or for use in elementary or middle grades in order to prepare students for future employment and independent living).

- Review various functional curricula. Examples can be found in NC Transition Manual, 110-114.
- Student Activity: Give students the opportunity to look over the curricula and discuss their advantages and disadvantages.

**XVII. On-Campus Vocational Training**

Now, we that have covered the functional academic portion of on-campus transition activities, let's take a look at some on-campus transition activities in the area of vocational skills. The purpose of on-campus vocational training activities is provide students with the opportunity to practice work habits/behaviors and develop some entry-level job skills in a "controlled" setting prior to going into the community for training.

A. School Factories/School-Based Enterprises {NC Transition Manual, 123}

1. (OVERHEAD 35) Definition: School factories are simulated learning environments, not actual jobs. The point of the simulated work is to help students gain the experience and skills needed to apply to a real work setting. Includes work contracted from local businesses and manufactured items for the purpose of teaching skills transferrable to real jobs and production of items for sale for the purpose of teaching marketable skills.

2. Ideas for the School Factory

- a. Laundry service
- b. Sewing/mending service
- c. Jewelry items
- d. Strip and refinish small furniture items
- e. Buttons for school events, clubs, etc.
- f. Grow herbs and make gift baskets
- g. Seasonal crafts/flower arrangements
- h. Package and wrap supplies for the Red Cross
- i. Collating projects
- j. Polish silverware
- k. Recycling projects
- l. Clerical work
- m. Contract work from area businesses

Note: NC Transition Manual, 126-128 explains how to establish a school factory.

3. Funding Sources for the School Factory

- a. Grants and foundations
- b. Use routine equipment and supply funds
- c. Donations from civic groups, PTO/PTA, and businesses
- d. Use excess money from contract work
- e. Fund-raising projects
- f. School-business partnerships

Note: Can look around school for equipment not being used.

4. (OVERHEAD 36) Guidelines For Selecting Goods and Services for Production in the School Factory (Keul, P. (1991). Consultation to school factories in Shelby City Schools, Charlotte, NC: Supported Employment Training, Inc. {NC Transition Manual, 125-126}
  - a. The service/product should be a relevant, "sellable" commodity in the community. Make sure you know what the market prices are, what the quality demands are and what consumers like.
  - b. The service/product is feasible to produce within budgetary and time resources of the school. Consider school schedule, staff supervision, cost benefits, storage (space and safety), costs of transporting materials.
  - c. The service/product will be beneficial to students in both net profit (after expense) and actual job skills students gain from the experience. Some products may be too teacher-directed. Consider training value and transference to the community.
  - d. The service product can be achieved with minimal teacher intervention (other than initial training and ongoing supervision). Don't forget student roles in supervision.
  - e. The service/product is valued and will promote inclusion not exclusion of students with disabilities. Consider joint projects with school clubs.
  - f. The service/product will permit students to have more vocational choices in the future.
  
5. (OVERHEAD 37) Methods For Structuring The Work In The School Factory (Keul, P. (1991). Consultation to school factories

in the Shelby City Schools. Charlotte, NC: Supported Employment Training, Inc.)

It is recommended that each school-based work experience "pass" the following criteria before implementation in order to achieve a high degree of simulation accuracy: {NC Transition Manual, 124}

- a. An accurate task analysis must be developed to fully detail the steps in producing each service or product produced by the school factory.
- b. Based on the task analysis, accurate, easy measurements can be developed to measure both quality and speed (production rate) of each product/service.
- c. The students can do the vast majority of the tasks in the task analysis once instruction is implemented.
- d. School resources and personnel are sufficient to deliver a quality service and/or product.
- e. Conditions closely resembling actual work demands can be simulated for the school factory.

In order to reproduce a real work environment as closely as possible there should be "company" policies for the school factory. Company polices should include the areas of general work rules, dress requirements, employment status, salary/wage information, evaluations, suspensions, lay-offs and dismissals. Students can also interview for "higher" level positions (e.g. work station supervisor).

B. On-Campus Jobs {NC Transition Manual, 129-130)

1. Has been done for years with general education students. Not done as much any more due to more rigorous academic standards.

2. Allows students to develop work behaviors, work habits and specific job skills in a "controlled" environment.
3. Student is placed in an on-campus job under the supervision of a school employee. Student performs specific skills based on a job duties form (developed from job task analysis).
4. Student should be evaluated on a regular basis by supervisor.
5. (OVERHEAD 38) Examples: cafeteria worker, office assistant, custodial/grounds keeping assistant, horticulture assistant, bus maintenance assistant, physical education/athletic assistant, biology lab assistant, art assistant, teacher assistant.
5. Can establish on-campus jobs on the home campus and on other school campuses in the same system. Students can practice skills on their school campus and then move to other campuses performing similar jobs allowing for increasing amounts of autonomy.

- C. How Does the Fair Labor Standards Act Relate to On-Campus Jobs {NC Transition Manual, 128-129, 131} (Love, L. (1994). Applying the FLSA when placing students in community-based vocational education. Phoenix, AZ: Arizona Department of Education.

Note: While the FLSA will be discussed in greater detail during the lecture on Community-Based Training where it's impact is far greater, here's what you need to know about how the FLSA impacts on school factories and on-campus jobs.

- i. (OVERHEAD 39) The FLSA will not be enforced with respect to minimum wages for students employed by any school in their district in various school-related work programs provided such employment is in compliance with child labor provisions.

2. (OVERHEAD 40) This no-enforcement policy does not apply to students in special education performing subcontract work or sheltered workshop type work on the school premises. This refers to the work done in a school factory for area businesses. In these cases the FLSA must be followed.
3. (OVERHEAD 41) As part of the overall educational program:
  - a. Schools may permit students to engage in school-related work programs, within their school district, conducted primarily for the benefit of the student for periods of no more than one hour per day.
  - b. May receive minimum payment for the activity but does not have to.
  - c. Exception: outside contractor doing business on the school campus (e.g. situations where the food service program is operated by an outside agency).

Suggested Videos:

1. The LCCE Curriculum Training Video. SEC, 1920 Association Drive, Reston, VA, 22091 (703-620-3660). Explains the LCCE curriculum, demonstrates who to administer the Knowledge and Performance tests, and shows several lessons. (55 minutes).



**School-Based Transition  
Activities**

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**What is Career Education?**

The process of systematically coordinating all school and community components together to facilitate each individual's potential for economic, social, and personal fulfillment and participation in productive work activities that benefit individual and others (Hoyt, 1975).

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**What is Career Education?**

A lifelong process that infuses a careers emphasis in all subjects, grades K - 12, including job training, apprenticeships, mentoring, career exploration, and the non-paid work done as a family member, citizen, and leisure seeker (Brolin, 1995).

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### History of Career Education

- 1972 Bureau of Education for the Handicapped endorsed Career Education
- 1973 National conference on Career Education
- 1974 Office of Career Education established
- 1976 CEC Division of Career Education established
- 1977 Career Education Implementation Incentive Act
- 1982 Repeal of Career Education Act

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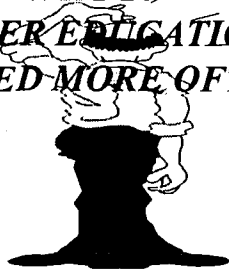
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**WHY IS  
CAREER EDUCATION NOT  
USED MORE OFTEN?**



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### Goals of Career Education

1. Provide career guidance, counseling, and placement services.
2. Provide necessary accommodations.
3. Equip students with employability skills.
4. Infuse career education.
5. Promote partnerships.
6. Relate education and work.
7. Make work meaningful.
8. Reduce bias and stereotyping.

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### Career Education vs. WDE

- K-12+ effort
- Not a course
- Does not replace traditional curriculum
- Occurs in stages
- Focuses on life skills
- More coordination



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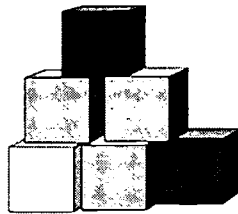
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### Stages of Career Education

- Career Awareness
- Career Exploration
- Career Preparation
- Career Assimilation



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### Life Centered Career Education Curriculum

- The LCCE prepares students for many roles:*
- 1. the work tasks associated with living in a family, being married, raising a family, and living independently,*
  - 2. being a good citizen, neighbor, and engaging in civic activities,*
  - 3. engaging in avocation activities, and*
  - 4. having a paid job.*

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### Highlights of LCCE

- Competency-based
- Focuses on life skills
- Interfaces curriculum with the stages of career education
- Develops a work personality
- Infusion
- Active partnerships
- Hands-on learning
- Normalization
- Inclusion
- Cooperative learning environments

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### LCCE Curriculum Areas



- Daily Living Skills
- Personal Social Skills
- Occupational Guidance and Preparation

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### Daily Living Skills

- Managing personal finances
- Selecting and managing a household
- Caring for personal needs
- Children/marriage
- Buying, preparing and consuming food
- Buying and caring for clothes
- Exhibiting responsible citizenship
- Use of recreational facilities and managing leisure time
- Getting around the community

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**Personal-Social Skills**

- Achieving self-awareness
- Acquiring self-confidence
- Achieving socially responsible behavior
- Maintaining good interpersonal skills
- Achieving independence
- Achieving problem-solving skills
- Communicating with others

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**Occupational Skills**

Career Guidance

1. Occupational possibilities
2. Occupational choices
3. Seeking, securing and maintaining employment

Career Preparation

1. Work habits
2. Physical-manual skills
3. Specific occupational skills

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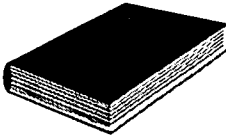
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**LCCE Curriculum Materials**

- Basic Curriculum Guide
- Competency and Instructional Units
- Competency Assessment Batteries




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### Why Is There A Need to Restructure?

- Traditional organization of the high school has served to limit options
- Many students not receiving appropriate vocational training
- Lack of academic and vocational integration

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*Today's schools are structured in almost the same way as were the schools of our parents and grandparents!*



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*As puzzle pieces are only fragments, so are subjects in our schools—each subject taught by a different teacher, in a different room, with different terminology. Each subject is an entity of its own. Elementary schools are not quite so fragmented. There is no changing of rooms, but as one says, "Now put away the science book and get out the science book."*

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*Is the emphasis on  
a baccalaureate degree right  
for all students?*



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### Myths About College Degrees

- Most high school students are prepared for colleges
- Most students who begin college - finish.
- Most college graduates find better jobs.
- It doesn't "hurt" to try.



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### Times Have Changed

- In 1992, 60% of students in lowest academic quartile are encouraged to go to college (1982-it was 20%).
- Lifetime earnings will be similar except for professional/managerial jobs.
- 82 million jobs don't require a college degree.

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## NC High School Graduation Requirements

English	4 units
Math	3 units (Algebra I)
Science	3 units (Biology, Physical Science)
Social Stu.	3 units (Government/Economics, U.S. History, World History)
Health/PE	1 unit
Electives	6 units

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## NC Graduation Policies

- Graduates must demonstrate Level III competency (grade level) on 8th grade end-of-grade test.
- Students can retake test several times (seniors must have opportunity to retake the last month of school)
- End-of-course scores should be used for grading students (just a recommendation)

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## Types of Graduation Documents

- North Carolina High School Diploma
- Certificate of Achievement
- Graduation Certificate



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### Approaches to Academics



- Remedial
- Maintenance
- Functional/Adult Outcomes

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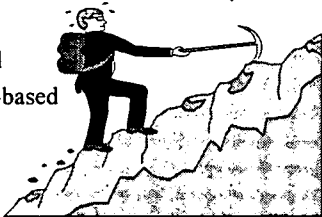
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### Developing A Functional Curriculum

- Community-referenced/functionality
- Integrated
- Longitudinal
- Community-based



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*What are some of the problems encountered in providing a functional curriculum (particularly when desiring inclusion)?*



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## School Factories

*School factories are simulated learning environments, not actual jobs. The point of the simulated work is to help students gain experience and skills needed to apply to a real work setting.*



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## Selecting Goods and Services (Keul, 1991)

- Relevant, sellable within community
- Feasible to produce
- Beneficial to students
- Achievable with minimal supervision
- Valued and promotes inclusion
- Permit future vocational choices

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## Structuring Work In the School Factory

- Develop an accurate task analysis.
- Develop accurate measurements to measure quality and speed.
- Students should be able to do vast majority of work (after instruction is completed).
- Have sufficient resources and personnel.
- Simulate actual work demands.

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### On-Campus Jobs

- Cafeteria Worker
- Office Assistant
- Custodial Assistant
- Groundskeeping Assistant
- Horticulture Assistant
- Bus Maintenance Assistant
- Physical Education or Athletic Assistant
- Biology Lab Assistant
- Art Assistant
- Teacher Assistant
- Library Assistant

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### The Fair Labor Standards Act and On-Campus Jobs

*The FLSA will not be enforced with respect to minimum wage for students employed by any school in their district in various school-related work programs provided such employment is in compliance with child labor provisions.*

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### FLSA (continued)

*This no-enforcement policy does not apply to students in special education programs performing subcontract work or sheltered workshop type work on the school premises. This refers to the work done in a school factory for area businesses. In these cases the FLSA will be followed.*

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*As part of the overall educational program:*

- 1. schools may permit students to engage in school-related work programs, within their school district, conducted primarily for the benefit of the student for periods of no more than one hour per day, and*
- 2. may receive minimum wage for the activity.*

*Exception: outside contractor doing business on the school campus.*

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## **Lecture 4: Workforce Development Education**

- I. What is Workforce Development Education? (formerly referred to as Vocational Education)
- A. (OVERHEAD 2) Organized educational programs which are directly related to the preparation of individuals for paid and nonpaid employment, or for additional preparation for a career requiring other than a baccalaureate degree or advanced degree.
  - B. Workforce Development Education represents a specific curriculum area within the school.

Note: There are different types of secondary vocational settings: 1) Comprehensive High Schools - where some students participate in Workforce Development Education courses while others do not; 2) Vocational High Schools - where all students participate in a Workforce Development Education program and; 3) Regional/Area Vocational Schools - serve a group of suburban or rural districts with each one contributing some or all of its Carl Perkins and other vocational funding to the operation of the school.

- II. (OVERHEAD 3) History of Vocational Education {NC Transition Manual, 134}
- A. 1918 Smith-Hughes Act
    - 1. Established agricultural education, industrial arts, and trade/industrial education.
  - B. 1963 Vocational Education Act
    - 1. First legislation of its type to specifically mention students with disabilities.
    - 2. Vocational education encouraged to make special efforts to serve students with disabilities.
    - 3. But no funds were provided.
  - C. 1968 Amendments to the Vocational Education Act
    - 1. Mandated that 10% of the federal funds given to states for vocational education had to be spent on programs for students

with disabilities.

2. To obtain funds, the states were required to match them dollar for dollar (14 states chose not to match).
3. Encouraged the development of agreements between Vocational Rehabilitation and Vocational Education for program coordination.

**D. 1976 Amendments to the Vocational Education Act**

1. Tightened matching requirements.
2. States required to spend at least 10% of their total allotment on vocational education for students with disabilities.
3. States required to use these funds to the maximum degree possible to assist individuals with disabilities in participating in regular vocational education programs.

**E. 1978 Policy Statement**

1. U.S. Office of Education issued a policy statement mandating that comprehensive vocational education be made available and accessible to all students with disabilities.

**III. Overview of the Carl Perkins and Applied Technology Act (Reauthorized in 1998 under the Workforce Investment Act) {NC Transition Manual, 135-136}**

**A. (OVERHEAD 4) "The Perkins Act is an important step in redirecting vocational education and, ultimately in restructuring our high schools for the 21st century." (Larry Rosenstock, PDK, February 1991)**

1. Began in 1984 first referred to as the Carl Perkins Vocational Education Act. Most recently re-authorized under the Workforce Investment Act in 1998.
2. Authorized Tech-Prep. Will discuss in greater detail later.
3. The goal was to make the USA more competitive in the world economy. Congress was concerned over narrow skill training and diluted academics. It was felt that vocational education could be active, practical, and exploratory.
4. Intended to assist with fulfilling transition part of IDEA.
5. Governs about a billion dollars a year in federal vocational education appropriations.

- B. (OVERHEAD 5) What Special Populations Does the Carl Perkins Act Cover? {NC Transition Manual, 136-137}

Note: Students can not be discriminated against due to their status as a "special population."

1. Disadvantaged Students (Six Categories)
  - a. Academically Disadvantaged
    1. scores at or below the 25th percentile on a standardized achievement or aptitude test
    2. secondary school grades below 2.0 on a 4.0 scale
    3. fails to attain minimum academic competencies
    4. does not include individuals with LD
  - b. Economically Disadvantaged
    1. Aid to Families with Dependent Children
    2. Food Stamps
    3. Chapter I program
    4. Free or reduced price meals
    5. Determined to be low-income based on latest Department of Commerce data
  - c. Migrant Students
    1. Agricultural or Fishing industry
    2. Moved with families during the past year for temporary or seasonal employment
  - d. Limited English Proficiency
    1. Not born in the USA or native language not in English
    2. American Indian and Alaska Natives who come from environments where language other than English had significant impact on their level of English proficiency
    3. Who by reason thereof, have sufficient difficulty speaking, reading, writing, or understanding English which denies the opportunity to learn successfully

in classrooms taught in English

e. Drop-outs

1. Persons who have left school for any reason before graduating or completing a program of study, without transferring to another school

f. Potential Drop-outs

1. Consistent low achievement
2. High rate of absenteeism
3. No motivation
4. Constant discipline problems
5. Delinquent behavior in school and community

2. Disabled/Handicapped Students

- a. Includes IDEA and Section 504 students (note that all students identified under IDEA fall under Section 504 but not all students identified under Section 504 fall under IDEA)

3. Other Categories

- a. Sex Equity Programs: individuals who participate in programs to eliminate sex bias
- b. Foster Children: must be served by the NC Department of Social Services
- c. Individuals in Correctional Institutions: must be under jurisdiction of the Juvenile Court System of NC General Court System

C. Funding of the Carl Perkins Act

1. Funding is given to each LEA based on grades 9-12 ADM. Perkins funds may be used to provide WFDE required by the IEP under IDEA and services necessary to meet requirements of Section 504.
2. Local plans and annual applications are required.
3. 57% of the funds allocated to the states for vocational education programs must be spent



on special programs and services for special groups.

4. Annual federal appropriations stated for handicapped and disadvantaged students must be matched equally by state and local funding.
- D. (OVERHEADS 6 and 7) Criteria for Services and Activities for Individuals Who Are Members of Special Populations -- **Required Assurances:** {NC Transition Manual, 137-138}
1. Equal access to recruitment, enrollment, and placement activities. Prior civil rights rulings make it clear that "access" must include the services necessary for real participation.
  2. Equal access to the full range of vocational education programs available. Perkins requires systems to develop strategies to overcome any barriers resulting in lower rates of access to WFDE.
  3. Provision of vocational education in the least restrictive environment. The establishment of separate WFDE programs may be discriminatory if "it limits students to a particular type of occupation or employer" or the separate program is of less quality.
  4. Vocational planning for individuals with disabilities coordinated by representatives of vocational education, special education, and state vocational rehabilitation agencies
  5. Vocational education monitored for students with disabilities to insure consistency with their IEP
  6. Notification to members of special populations and their parents at least one year prior to eligibility including information about specific courses, services, employment opportunities, and job placement
  7. Assistance with transitional service requirements for individuals with disabilities
  8. Provision of supplementary services including

such things as curriculum modification, equipment modifications, classroom modification, supportive personnel, and instructional aids and devices

9. Provision of guidance, counseling, and career development activities by professional trained counselors and teachers
  10. Provision of counseling and instructional services designed to facilitate the transition from school to post-school employment and career opportunities
- E. (OVERHEAD 8) Transition Services Required by the Carl Perkins Vocational and Applied Technology Act of 1990

Each LEA shall:

1. Assist students...with disabilities in fulfilling the transition services requirements of section 626 of the Education of the Handicapped Act (Perkins II, 118(c) (1)), and
2. Provide counseling and instructional services designed to facilitate the transition from school to post-school employment and career opportunities (Perkins II, 118(c) (5)).

IV. **Career Development Plans and Career Development Plus Plans** {NC Transition Manual, 138-139}

In earlier lectures we have discussed transition plans and their components. One of the aims of a transition plan is to help a student determine career goals and ensure a course of study and transition activities that will ultimately lead to the accomplishment of this goal. Through the Carl Perkins Act, students enrolled in Workforce Development Education courses must develop a Career Development Plan. If they are in one of the special populations (which we just reviewed) they must also have a Career Development Plus Plan. These plans have a similar purpose to the employment portion of the transition plan. Let's take a closer look at these two documents.

- A. (OVERHEAD 9) Career Development Plans (CDPs) are mandated by Carl Perkins for all students enrolled in vocational education classes and guided by the

performance-based vocational and technical education system in place in North Carolina.

1. Each student enrolled in vocational and technical education, grades 9 - 12, will have a career development plan (CDP) on file which includes academic and vocational and technical education courses appropriate for his or her designated career goal. For each special populations student, a section ("plus" or "+") will be included as part of the CDP, listing incentives and adjustments necessary for that student to carry out his or her CDP.

Must indicate on the CD+ that the student has been assessed and either needs or does not need additional services or assistance to access, progress in and succeed within vocational and technical education courses. Types of services and assistance that could be offered:

- a. Assistance to enter vocational programs and (for students with disabilities) assistance in fulfilling the transition service requirements of IDEA
- b. Guidance, counseling, or career development activities conducted by professionally trained counselors and teachers who are associated with the provision of special services
- c. Curricular modifications
- d. Equipment modifications
- e. Supportive personnel (e.g. Special Populations Coordinator, Guidance Counselors, Tutors, etc.)
- f. Instructional aids and services
- g. Counseling, instruction, and services for transition from school to further education or training and/or work (Seven categories based on Perkins II subparagraphs (a) of

section 235;(c) of S.118; and (13),  
(19), (24), (31) and (38) of S.521)

Note: Discuss types of modifications that might be appropriate for various WFDE classes.

**22. Course Blueprint (for Workforce Development Education courses)**

1. (OVERHEAD 10) A course blueprint is a document laying out the scope of the curriculum for a given course/program. Shown on the blueprint are the units of instruction, the core competencies for each unit and the specific objectives for each competency. The blueprint provided from the statewide curriculum effort illustrates the recommended sequence of units and competencies and the number of hours or class periods to be devoted to each. The number of hours is also an indication of the weight or relative importance of the content to be covered in the course. The blueprint is intended to be used by teachers in planning the course of work for a year, the basis for preparing daily lesson plans and in constructing instructionally-valid tests. {NC Transition Manual, Appendix X}

Note: There are Workforce Development Education Performance Measures (latest developed in February of 2000). Students need to know that these standards exist in order to understand the accountability expectations for workforce development educators (although they may not need to know all the details for this course). At some point in the future VOCATS scores will most likely be part of North Carolina's ABC plan. The performance standards are as follows:

Academic Attainment Performance Measure

By the school year 2003-2004, 43% of vocational concentrators scheduled to graduate that year will score at the national average on the ASSET test. (A vocational concentrator is a student that follows a career pathway and completes 4 vocational courses in that pathway).

Technical Attainment Performance Measure

By 2003-2004, 59% of Workforce Development Education enrollees will score at Level III or better on end-of-course VOCATS tests.

Credential Attainment Performance Measure

By 2003-2004, 25.3% of vocational concentrators who graduate that year will have completed a college tech prep (CTP) or a college prep/college tech prep (CP/CTP) course of study.

Placement Performance Measure

By 2003-2004, 95.3% of vocational concentrators who graduate will go on to further education, work, or both the year following graduation.

Nontraditional Enrollment Performance Measure

By 2003-2004, 26.0% of nontraditional genders will enroll in nontraditional Workforce Development Education courses.

Nontraditional Graduation Performance Measure

By 2003-2004, 15.8% of nontraditional genders will graduate from nontraditional Workforce Development Education courses.

Note: Challenge: A Handbook for Serving Members of Special Populations (NCDPI - Workforce Development Education Division) gives examples of Career Development Plans and Career Development Plus Plans. Also examples can be obtained from the Workforce Development Education Department at a local high school.

- V. (OVERHEAD 11) **Tech-Prep** (authorized by Carl Perkins) {NC Transition Manual, 139-140}
- A. Tech-Prep is designed for high school students who will focus on a curriculum designed to better prepare them for community college, technical school, or the high tech world of work. By providing focus and academic challenge at an early stage in a student's high school career, the Tech-Prep program offers options rather than limitations. A successful Tech-Prep student has the flexibility to change clusters or move to the college prep program.
  - B. The high school course of study is designed to assure high school students acquire more technologically-oriented knowledge and skills.
  - C. Consists of 2 years of high school preceding graduation and 2 years of higher education

following instruction received at the secondary level (2 + 2 allows students to earn community college credit while still in high school).

C. (OVERHEAD 12) Tech-Prep is:

1. an avenue to educational reform with emphasis on contextual learning that combines knowledge with doing
2. the integration of professional-technical education and academic curricula with an applied academic emphasis
3. a cooperative secondary and post-secondary program emphasizing continuity in learning
4. an avenue with multiple exit points leading to an associate's degree and possibly more advanced curriculum
5. a curriculum choice for students based upon learning styles and models
6. preparation for a career and continuing education
7. a clear curricular structure with substance and focus
8. helping students use information (Global Edge, Collin County Tech Prep Consortium)

D. (OVERHEAD 13) Tech-Prep is not:

1. the same approach to education but with a new name
2. professional-technical education only
3. a terminal education program
4. a "tracking" approach to education
5. entry-level job preparation only
6. general education
7. just dispensing information

5. (OVERHEAD 14) Tech-Prep Career Pathways

1. Business and Marketing
2. Construction Technology
3. Environmental Services
4. Health Services
5. Human Services
6. Industrial Communications Technology
7. Manufacturing Engineering
8. Transportation Engineering

Note: The Career Pathways Guides can be obtained from NCDPI - Workforce Development Education Division. It would be helpful to have copies of

the Career Pathway guides for the students to review.

VI. **Goals 2000**

- A. Set forth by the Bush administration in April 1991. Voluntary national standards of what students should know. Encourages parent information and resource centers. Supports grass-roots approach to school reform with government assisting with reform attempts. \$104 million was appropriated in 1994 for Goals 2000.
- B. The School-To-Work Opportunities Act which we will discuss next was meant to be incorporated under Goals 2000.
- C. (OVERHEADS 15 and 16) Goals 2000 - Educate America
  - 1. Every American child must start in school prepared to learn, sound in body, and sound in mind. (Ex. Smart Start)
  - 2. The high school graduation rate in the US must increase to no less than 90%.
  - 3. All students in grades 4-8-12 will be tested for progress in critical subjects. (Ex. NC ABC plan)
  - 4. American students must rank first in the world in achievement in math and science. (Ex. Addition of Algebra I requirement for graduation)
  - 5. Every adult must be a skilled, literate worker, and citizen able to compete in a global economy. (Ex. School-To-Work Opportunities Act, Transition, Tech-Prep)
  - 6. Every school must be drug-free and offer a disciplined environment conducive to learning. (Ex. NC Safe Schools Act)

VII. **School-To-Work Opportunities Act** {NC Transition Manual, 140-143}

The employment needs of our society have changed. There is a greater need now for technologically skilled workers. In the past there was a higher likelihood that

high school graduates could find employment in a business or industry and receive on-the-job training to adequately prepare them for a career. Today (and it is predicted to continue in the future), due to the changing technological needs of our nation's industries, employees are needed who have a higher level of skills commensurate with the today's technology.

A. (OVERHEAD 17) Introduction

1.	1950	2000
	20% professional	20% professional
	20% skilled	65% skilled
	60% unskilled	15% unskilled

\* Skilled - means some training beyond high school

2. (OVERHEAD 18) Yesterday's Auto - 200 workers needed to build one car. Today's Auto - 3 workers with a robot needed to build one car
3. (OVERHEAD 19) "When I was young, I knew I wanted to be someone. Now I wish I had been more specific." Lily Tomlin

B. Overview of the School-To-Work Opportunities Act (P.L. 103-239)

The School-To-Work Opportunities Act was intended to assist in producing a higher number of skilled employees and to provide students with a career goal. The goal was a high quality school-to-work transition system.

1. Signed by President Clinton on 4-20-94. Cooperative effort between the Department of Education and the Department of Labor. Funding involved non-competitive development grants and one time five year implementation grants through a competitive process requiring a comprehensive state plan. Partnership grants awarded in North Carolina in 1995.
2. Intended to be integrated under Goals 2000-Educate America. Does not create a separate program. Designed to build on and advance existing programs and reforms.



3. Commitment to young people to provide them with the training and opportunities needed to gain superior work skills and earn higher wages.
4. Commitment to current workers that they will have the type of resources needed to go back to school and receive training for a changing economy.
5. (OVERHEAD 20) The act is not intended to be limited to only certain categories of students. "All" students means both male and female students from a broad range of backgrounds and circumstances, including disadvantaged students, students with diverse racial backgrounds, students with disabilities, limited English proficient students, migrant children, school dropouts, and academically talented students. Programs must provide ALL students with equal access to the full range of program components and related activities.

C. Major Components of the School-To-Work Opportunities Act

(OVERHEAD 21) School-To-Work Is...

A system built to provide opportunities for students to learn about and experience work while in school.

Educational reform that addresses the need for students to gain work experience and workplace skills while in school.

Partnerships between schools, employers, and communities.

For all students, kindergarten through 12th grade.

1. All students can participate in performance-based education and training programs to learn the skills needed for high wage employment and/or continuing education.
2. All students will declare a career major. Link secondary and post-secondary education.

3. All students will have equal access to the full range of program components.
4. Students will have work-based learning in their field of concentration including school-based enterprises, career major internships, cooperative education, and apprenticeships.
5. School-based learning and work-based learning should be integrated. (School-To-Work Outreach Project (1996). Minneapolis, MN: Institute on Community Integration, University of Minnesota.)

Note: The difference between Tech-Prep (focuses only on grades 9-12) and STW (is K-12).

Discussion Point: Note the implication of the word **All** used in the wording of the School-to-Work Opportunities Act. Are students in Special Education programs really being involved in the School-to-Work effort?

D. Implementation of the School-To-Work Opportunities Act

1. Local Partnerships develop local plans. Many counties have received planning and implementation grants. Local plans should contain:
  - a. a description of work-based learning component, school-based learning component, and connecting activities (these will be discussed in greater detail in a moment).
  - b. measurable program goals and outcomes
  - c. a plan for serving all students in the area
  - d. provisions for paid work experiences
  - e. employer involvement in STW system development
  - f. how opportunities will be provided for students in industries and occupations that offer high-skill, high-wage employment opportunities
2. Composition of Local Partnerships:

- Employers or employer organizations
- Secondary and post-secondary institutions
- Students
- Labor organizations
- Non-managerial employee representatives
- Community-based organizations
- National Trade Organizations at local level
- Industrial Extension Centers
- Rehabilitation agencies
- Registered apprenticeship agencies
- Local vocational education entities
- Local government agencies
- Parent organizations
- Teacher organizations
- Vocational student organizations
- Private Industry Councils
- Indian tribes

3. (OVERHEAD 22) The School-Based Learning Component involves:

- a. Career awareness and career exploration
- b. Selection of a career major
- c. Rigorous program of study consisting of academic standards consistent with that required of all students appropriately tied to Goal 2000, and meets the requirements for students to enter post-secondary education and issuance of skill certificates.
- d. Program of instruction that integrates academic and vocational learning via applied and contextual teaching methodologies (Applied Academics).
- e. Regularly scheduled evaluations to benchmark and track student progress.

Practical Examples: Junior Achievement, high school technology courses taught by engineers from local industries, High Schools that Work.

4. (OVERHEAD 23) Work-Based Learning Component involves:

- a. Work experience (paid or nonpaid). Priority should be given to programs

- with paid work experience.
- b. Job training
  - c. Workplace mentoring
  - d. Instruction in workplace competencies
  - e. Instruction in all aspects of industry
    - 1. Planning (relation of industry to society and economics)
    - 2. Management (managing time, worker involvement, decision-making)
    - 3. Finances (raising capital)
    - 4. Technical and Production (production techniques, organization of production)
    - 5. Underlying Principles of Technology (Math/Science/Social/Economic principles supporting technology)
    - 6. Labor Issues (worker rights and responsibilities, labor unions)
    - 7. Community Issues (community impact on industry and visa versa)
    - 8. Health, Safety, and Environmental Issues (related to workers and community)

Practical Examples: Job shadowing, Cooperative Education, Internships, Apprenticeships, Job Fairs.

Note: Apprenticeships offer the opportunity to learn an occupation while under the supervision of experienced workers. Usually lasts 3-4 years and is paid. Sponsored by unions, public agencies or company. U.S. Bureau of Apprenticeship and Training can provide additional information. Examples of apprenticeships include furniture craftsman, loom builders, and other highly skilled professions that require on-the-job training and experience.

- 5. (OVERHEAD 24) Connecting Activities Component can include:
  - a. Matching students with employers
  - b. Establishing liaisons between school and employers (workplace mentors and school site mentors)
  - c. Technical assistance to schools and employers to coordinate students between settings
  - d. Assistance to integrate school-based and

- work-based learning
- e. Job placement, continuing education, or assistance in attaining further training
- f. Collection and analysis of post-program outcomes of participants
- g. Linkages with youth development activities and industry

Note: Every high school will have a job broker to link students to work experiences. The job broker will work with the Industrial Education Coordinator and guidance counselors to provide career information.

6. Federal Programs To Be Coordinated with STWOA

- Adult Education Act
- Carl D. Perkins Vocational and Applied Technology Education Act
- Elementary and Secondary Education Act
- Higher Education Act
- Social Security Act (Part F of Title IV)
- Goals 2000: Educate America Act
- National Skills Standards Act
- Individuals with Disabilities Education Act (IDEA)
- Job Training Partnership Act (JTPA)
- National Apprenticeship Act
- Rehabilitation Act
- National and Community Service Act

Note: Discuss the SCANS skills. In May of 1990 the Secretary's Commission on Achieving Necessary Skills (SCANS) was established by the U.S. Secretary of Labor (Lynn Martin). It was composed of 30 individuals from business and education. They were directed "to advise the Secretary on the level of skills required to enter employment." Hundreds of people representing the nation's businesses, schools, and unions were interviewed. The result of the first year's work was published in June of 1991 in a report titled, *What Work Requires of Schools*. This report identified 36 skills considered to be essential skills for success in the current and future workplaces. These skills became known as the SCANS skills. The philosophy of SCANS is "Scans believes that teachers and schools must begin early to help students see the

*relationship between what they study and its application in real world contexts...We believe after examining the findings of cognitive science, that the most effective way of teaching skills is in context. Placing learning objectives within real environments is better than insisting that students first learn in the abstract what they will then be expected to apply...Reading and math becomes less abstract and more concrete when they are embedded in one or more of the competencies; that is, when the learning is "situated" in a system or a technological problem.*

Examples of SCANS Skills:

1. Resources: Identifies, organizes, plans and allocates.
2. Interpersonal skills
3. Information: acquires and uses information
4. Systems: understands complex inner-relationships
5. Teaching: words with a variety of technology

VIII. **North Carolina's School-To-Work Opportunity Act Program is Called JobReady** {NC Transition Manual, 143}

Note: JobReady contains all the components of the School-To-Work Opportunities Act. The following information is from literature available from the N.C. School-To-Work Office (919) 715-3300.

A. (OVERHEAD 25) What is JobReady?

1. North Carolina's system for ensuring that all high school students have a clearly identifiable, accessible, and attractive pathway into the workplace. Each local education agency has a JobReady plan that focuses on the common components but differs based on community needs. The development and implementation of the plan is overseen by a JobReady Council. (School-to-Work Office, Raleigh, N.C. 1996)

B. What is included?

1. All students: College Prep and Tech Prep

2. Students with disabilities; students without disabilities
3. Dropouts and students in school
4. Academically talented and the non-academically talented

C. What is included?

1. Comprehensive career guidance beginning in elementary school and continuing through post-secondary
2. Selection of a career major and courses to support the competencies needed for the major
3. Certification of initial mastery in high school
4. Work-based learning through experiences such as shadowing, a career major internship, cooperative education, career academy, school-based enterprises, Tech-Prep, apprenticeships, etc.

D. (OVERHEAD 26) Benefits of JobReady to the student

1. Higher expectations of achievement supported by a more rigorous curriculum
2. Learning focused on a "career pathway"
3. Contextual (applied) learning with higher retention rate
4. Work experience related to career goal before graduation
5. Increased self-confidence, success at school and work

E. Benefits to the employer

1. Better trained entry level worker
2. Opportunity to assist in curriculum design
3. Reduce retraining costs

F. Benefits to the community

1. Stimulated local economy
2. Skilled workers for existing and emerging occupations
3. Reduced unemployment
4. Improved quality of life in the community

Examples of Job Ready activities: Junior Achievement, Job Fairs, Real World Academy for Teachers (where teachers experience the real world of work through

summer internships), Job Shadowing Links through the Internet, Mock Interviews conducted by Rotary Club members, Finance Academy (high school course taught by bankers), and Choices (high school about personal financial responsibility and budgeting taught by bankers).

VIX. (OVERHEAD 27) **Who Are the Players in Workforce Development Education?**

A. Special Populations Coordinator are responsible for:

1. Career guidance and counseling regarding the Career Development Plans and the Individualized Education Plan including the transition component
2. Outreach and recruitment
3. Identification of special populations students
4. Assessment and follow-up
5. Identification of learning styles of students
6. Monitor vocational enrollment to ensure appropriate placement, program access, success and progress
7. VoCATS assistance (modifications for students with disabilities)
8. Curriculum modifications
9. Equipment adaptations
10. Transition services/post-secondary preparation
11. Coordination of summer youth employment
12. Staff development regarding strategies and techniques for special populations

B. Industry Education Coordinator (aka Job Broker) is responsible for:

1. Career guidance, counseling and aptitude assessment
2. Coordination of Career Planning folders and IEPs
3. Pre-registration counseling regarding high school opportunities that focus on careers
4. Post-secondary placement assistance (employment and educational)
5. Job placement
6. Business and industry contact (job shadowing, career day, partnerships, speakers bureau, field trips, etc.)



7. Military liaison (site facilitator)
8. Coordinate employability skills training workshops
9. VoCATS assistance
10. Vocational Education Information System (VEIS) facilitator
11. Coordination of career center

C. Career Guidance Counselor is responsible for:

1. Support career guidance, counseling, and assessment activities
2. Outreach and recruitment
3. Coordination of Career Planning folders and IEPs
4. Identification of special populations students
5. Business/industry contact (job shadowing, career day, partnerships, speakers bureau, field trips, etc.)
6. Support for vocational curriculum through classroom presentations
7. Coordinate outside contact with Summer Youth Employment
8. VoCATS assistance
9. Coordination of career center

X. **Integration of Special Education and Vocational Education**

1. Participation of special education students in Workforce Development Education
  1. While vocational education programs have experienced a 35% enrollment increase since Carl Perkins Act of 1984, the legislative intent is still not realized.
  2. There is a continued lack of vocational emphasis in IEPs.
  3. When students with disabilities participate in vocational education, they often do so in programs which have non-occupational specific goals (e.g. introductory courses).
  4. When students with disabilities do gain access to Workforce Development Education courses and are given supports leading to successful program completion they obtain

employment at the same rate as students without disabilities (Rockwell, Weisenstein, and LaRoque, 1986).

- B. (OVERHEAD 28) Practical suggestions for coordinating of Special Education and Workforce Development Education {NC Transition Manual, 144-146)

There should not be a wall between Special Education and Workforce Development Education. There should be no rigid separation between the departments in any aspect of planning or programming. Effective collaboration requires that a student's IEP team have members who are knowledgeable about WFDE curriculum, methodology, and expectations in order to ensure that effective supports are provided. WFDE AND special education teachers must actively participate in planning and special education teachers must develop a base of WFDE knowledge in order to make suggestions on teaching strategies, classroom management, and accommodations appropriate to those courses.

1. Allow students in an alternative curriculum to take the same Workforce Development Education course twice for credit either in the same year or consecutive years.
2. Waiver the prerequisite course for certain Workforce Development Education courses in order to assist students who are unable to do a great deal of "bookwork" to get more hands-on practice.
3. Use the course blueprint for the Workforce Development Education course to determine which objectives are appropriate for an individual student. This determination should be made by the special education teacher and the Workforce Development Education teacher. The VoCATS can then be individualized to focus on the designated competencies for that student.
4. Combine the ITP and the CDP+. Make sure the Special Populations Coordinator is involved in the transition planning teams and the ITP contains all the essential parts of the CDP+.
5. Give Workforce Development Education credit for extended training conducted in the community at real job sites (e.g. internships).

Final Note: "We are living in a world where what you earn is a function of what you learn" (President Clinton). Every young adult should have access to the preparatory program that meets his or her future career goals. These programs should contain a combination of both on-campus and off-campus experiences.

Suggested Videos:

1. Making Sense. Mid-Williamette Educational Consortium (1996) Chemeketa Community College, P.O. Box 14007, Salem, Oregon (503-399-5239). This video presents Katie, a high school student who is having a difficult time making a decision about what to do after high school. The video presents several different options and shows how Katie reached her decision with the help of family and teachers. (12 minutes)
2. Making More Sense. - Mid-Williamette Educational Consortium. (1996) Chemeketa Community College, P.O. Box 14007, Salem, Oregon (503-399-5239). This is a continuation of Katie's story in the form of a discussion panel with all the key players. (9 minutes)

**Workforce Development  
Education**

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**What is Workforce  
Development Education**

Organized educational programs which are directly related to the preparation of individuals for paid and nonpaid employment, or for additional preparation for a career requiring other than a baccalaureate degree or advanced degree.

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- History of Vocational  
Education**
- 1918 Smith Hughes Act
  - 1963 Vocational Education Act
  - 1968 Amendments to the Vocational Education Act
  - 1976 Amendments to the Vocational Education Act
  - 1978 USOE Policy Statement

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### Carl Perkins and Applied Technology Act of 1990

The Perkins Act is an important step in redirecting vocational education and ultimately in restructuring our high schools for the 21st century.

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### Special Populations

- Academically Disadvantaged
- Economically Disadvantaged
- Migrant Students
- Limited English Proficiency
- Drop-outs
- Potential Drop-outs
- Disabled/Handicapped Students
- Other : Sex Equity/Foster/Prisons

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### Required Assurances

1. Equal access to recruitment, enrollment, and placement activities.
2. Equal access to the full range of vocational educational programs that are available.
3. Provision of vocational education in the least restrictive environment.
4. Coordinated vocational planning.
5. Consistency with IEP.

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**Required Assurances  
(continued)**

6. Notification one year prior to eligibility.
7. Assistance with transition service requirements.
8. Supplementary services.
9. Provision of guidance, counseling, and career development activities.
10. Provision of counseling and instructional services to facilitate transition.

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**Transition Services Required  
by Carl Perkins**

Each LEA shall:

1. Assist students...with handicaps in fulfilling the transition services requirements of section 626 of the Education of the Handicapped Act.
2. Provide counseling and instructional services to facilitate transition from school to post-school employment and career opportunities.

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**Career Development Plans**

Each student enrolled in vocational and technical education, grades 9-12, will have a career development plan (CDP) on file which includes academic and vocational and technical education course appropriate for his or her designated career goal. For each special populations student, a section ("plus" or "+") will be included as part of the CDP, listing incentives and adjustments necessary for that student to carry out his or her CDP.

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### Course Blueprint

- Lays out the scope of the curriculum for a course/program.
- Shows units of instruction, core competencies, and specific objectives.
- Shows recommended sequence of units and the number of hours/class periods to be devoted to each.
- Basis for planning lessons.

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### Tech-Prep

Allows students to focus on a curriculum designed to better prepare them for community college, technical school, or the high tech world of work.



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### Tech-Prep is:

- An avenue for educational reform
- Integration of curriculum
- Cooperative program
- Flexible with multiple exit points
- A curriculum choice
- Preparation for continued learning

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**Tech-Prep is not:**

- An old approach with a new name
- Professional-technical education only
- A terminal education program
- Tracking
- Entry-level job preparation only
- General education

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**Tech-Prep Pathways**

■ Business and Marketing	■ Industrial Communication Technology
■ Construction Technology	■ Manufacturing Engineering
■ Environmental Sciences	■ Transportation Engineering
■ Health Services	

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**Goals 2000**

1. Every American child must start school prepared to learn, sound in body, and sound in mind.
2. The high school graduation rate in the US must increase to no less than 90%.
3. All students in grades 4-8-12 will be tested for progress in critical subjects.

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### Goals 2000 (continued)

4. American students must rank first in the world in achievement in math and science.
5. Every adult must be a skilled, literate worker, and citizen able to compete in a global economy.
6. Every school must be drug-free and offer a disciplined environment conducive to learning.

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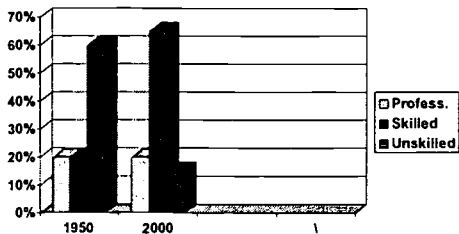
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### Job Trend Changes



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*Yesterday's automobile took 200 workers to build. Today's automobile takes 3 workers and a robot to build.*



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*When I was young, I knew  
I wanted to be someone. Now  
I wish I had been more  
specific.*

*- Lily Tomlin*



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### All Means All

STWO act is not intended to be limited to only certain categories of students. "All" students means both male and female students from a broad range of backgrounds and circumstances, including disadvantaged students with diverse racial backgrounds, students with disabilities, limited English proficient students, migrant students, school drop-outs, and academically talented students.

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### School-To-Work Is:

- A system to provide opportunities to learn about and experience work while in school.
- Educational reform that addresses the need for gaining work experience and workplace skills while in school.
- Partnerships between schools, employers, and communities.
- For all students, kindergarten - 12th grade.

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**School-Based Learning**

- Career awareness and career exploration
- Selection of a career major
- Rigorous program of study
- Applied academics
- Regularly scheduled evaluations

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**Work-Based Learning**

- Work experience (paid or nonpaid)
- Job training
- Workplace mentoring
- Instruction in workplace competencies
- Instruction in all aspects of industry

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**Connecting Activities**

- Matching students to employers
- Establishing liaisons between schools and employers
- Technical assistance for coordination
- Collection and analysis of post-program outcomes of participants
- Linkages with youth development activities and industry

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**JobReady**

**North Carolina's system for ensuring that all high school students have a clearly identifiable, accessible, and attractive pathway into the workplace.**



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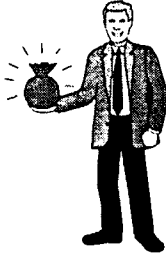
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**Benefits of JobReady**



- Benefits to the student
- Benefits to the employer
- Benefits to the community

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**Workforce Development  
Education Players**

- Special Populations Coordinator (SPC)
- Industry Education Coordinator (IEC)
- Career Guidance Counselor



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### Coordinating Special Education and WDE

- Take same WDE course more than once for credit (alternative curriculum)
- Waiver prerequisite courses
- Use course blueprints to determine appropriate objectives and modify VoCATS.
- Combine ITP and CDP+
- Give WDE credit for extended CBT.

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# Lecture 5: Interagency Collaboration and Team Meetings

## 1. Introduction

- A. Interagency collaboration is essential to successful transition planning. Effective transition planning and service provision depend on establishing working relationships between agencies.
- B. The importance of interagency collaboration in the transition process is referenced in IDEA, Carl Perkins and the Rehabilitation Act Amendments of 1986.
- C. (OVERHEAD 2) Interagency collaboration is a process in which two or more agencies integrate their resources to provide services to meet the needs of students and adults with disabilities.
- D. (OVERHEAD 3) Quote: *"Where once there may have been barriers, rivalries and distrust, the school must foster teamwork and partnerships with adult service agencies. The partnership is not a new look at an old battle, it is a common struggle, not separate struggles for power."* (Peter Scholtes in the Team Handbook)

## II. Models of Interagency Coordination (Wehman, Moon, Wood, & Barcus (1988). Transition from school to work: New challenges for youth with severe disabilities. Baltimore, MD: Paul H. Brookes).

- A. (OVERHEAD 4) Quote: *Adam said to Eve when leaving the Garden of Eden, "Honey, things aren't ever going to be the same."* IDEA changed forever the notion of interagency collaboration.
- B. (OVERHEAD 5) Model A: Information Transfer. There is a transfer of records (medical, educational, psychological, vocational, etc.) for individuals referred for services. There is little or no planned communication between the agencies. No coordinated planning. Agencies get in their "boxes" and stay there.
- C. Model B: Responsibility Transfer. A team of professionals (ITP team) decide the sequence of services. There are no overlap of services. The purpose of coordination is to line up services to start when one agency's services stops. There is a smooth and

uninterrupted service delivery framework.

- D. **Model C: Collaborative Exchange.** Agencies combine resources to effect the students' transition to employment during the last 2 years of school. There is an overlap of services. All services are involved in the planning process. There are formal and informal means of communication.

**III. (OVERHEAD 6 and 7) Why Is Interagency Coordination Important? {NC Transition Manual, 52-53}**

- A. **Transition is complicated. In general the more severe the disability - the more complicated the process.**
- B. **There is no mandate for adult services. Students are moving from a system of entitlement to one of eligibility.**
- C. **There is a need to overcome gaps in services.**
- D. **Many agencies will likely be involved in the process. Time is needed to figure out "who will do what", "when will things be done" and "who will pay."**
- E. **Eligibility requirements and other agency guidelines will vary. A student may qualify for one service and not another.**
- F. **There is a need to reduce duplication of assessments, intake procedures, referrals, etc.**
- G. **There is a need for joint planning. One comprehensive plan.**
- H. **There is a need to focus on the student.**
- I. **There is a need to increase the comfort level of students and parents with the professionals and agencies who will be providing services after graduation.**
- J. **Coordination ensures that the student is started on a productive path. (Anderson, F. (1993). Interagency collaboration transition councils. Gainesville, FL: University of Florida, Project RETAIN).**

**IV. (OVERHEAD 8) Benefits of Interagency Collaboration**

- A. **Comprehensive and qualitative evaluation**
- B. **Avoids duplication of services**
- C. **Ensures coordination of recommendations**
- D. **Creates increased confidence in service providers**
- E. **Assists in generating needed reports**
- F. **Improves program placement**
- G. **Increases availability of services**
- H. **Improves community relations**
- I. **Reduces the costs to the schools**
- J. **Increases the self-worth and dignity of student**

V. **Barriers to Effective Interagency Collaboration** {NC Transition Manual, 53-54}

- A. **(OVERHEAD 9) Lack of vision.**
- B. **Resistance to change or changes occurring too rapidly.**
- C. **Poor or inadequate information exchange.**
- D. **Lack of staff training.**
- E. **Failure to restructure services (Superimposing a circle over a square - doesn't fit).**
- F. **Turfism ("Where you stand depends on where you sit").**
- G. **Bureaucracy and administrative control. Highly standardized routines and decision-making hinder coordination of services. Rules end up directing behavior. Beware of "trained incapacity" which occurs when staff are so highly trained in procedures that they will incapacitate the organizational process (Example: A bus driver is told to stay on his route. A child becomes very ill on the bus. A hospital is one street over from the approved route but the driver will not take the child to the hospital because he has been told to stay on the route).**
- H. **Failure to use person-centered planning (this will be discussed in more detail later when we talk about team meetings).**
- I. **Pessimism.**
- J. **Lack of leadership.**
- K. **Historical baggage. (OVERHEAD 10) Quote: "Our future is shaped by our past... so be very careful what you do in past." (Ziggy)**
- L. **Lack of personal and respectful relationships (very serious if it involves the initiators).**
- M. **Jealousy (among professionals or agencies).**
- N. **Too much emphasis on measurable factors.**
- O. **(OVERHEAD 11) Gatekeeping - individuals with sufficient control over resources to block and/or inhibit change and innovation.**
- P. **Satisfaction with the status quo. People feeling like they have too much invested in the way things are. Quote: "Some will try to maintain the status quo long after the quo has lost its status." (James Lyons) Quote: "A pig lying in a mudhole wants to stay there." (James Lyons)**
- Q. **Anxiety - Insecurity - Fear (Ego involvement).**
- R. **Costs too high and rewards inadequate.**
- S. **Lack of commitment (personal and resources).**
- T. **Lack of divisibility (the inability to try things on a limited basis).**
- U. **Incompatibility (How does this fit in with what is already being done?).**

VI. **(OVERHEAD 12) Characteristics of Effective Interagency Coordination**



- A. **Shared goals/mission/vision. A vision is a mental image that articulates a view of a realistic, creditable, and attractive future for the team. Provides a bridge from the present to a future better condition. Prohibits the negotiation of values and beliefs. A solid vision provides a benchmark for evaluation. Everyone agrees to and is committed to accomplishing the vision. The team focuses on and reflects a collective vision.**
- B. **Climate of trust and openness.**
- C. **Open and honest communication.**
- D. **Sense of belonging.**
- E. **Diversity valued as an asset.**
- F. **Creativity and risk-taking. Fosters self-determination and growth both as a team and individually.**
- G. **A willingness to self-correct.**
- H. **(OVERHEAD 13) Members who are interdependent. Reciprocal relationships.**
- I. **A consensus decision-making style.**
- J. **Participatory leadership.**
- K. **Fosters inclusion of the person affected by the team's actions.**
- L. **Reflects a fluid and dynamic quality.**

**VII. (OVERHEAD 14 Guidelines For Establishing an Interagency Transition Team {NC Transition Manual, 57-59}**

- A. **Ensure a high level of optimism, teamwork and high expectations.**
- B. **Develop a proposal and present to key people.**
- C. **Select appropriate people for the team. People are needed who are comfortable with others, open-minded, hard-working and willing to try new things.**
- D. **Allow team members to get to know each other both personally and professionally. Develop trusting relationships based on mutual respect.**
- E. **Get administrative support. Quote: "Make sure you have enough weight on your side of the see-saw." (James Lyons)**
- F. **Ensure initial success. Focus on obtainable goals.**
- G. **Acknowledge fears and be open about concerns.**
- H. **Establish solid, positive communication patterns. In the past information was shared in the forms of written reports. There was no planned procedure for ensuring communication between the agencies.**
- I. **Acknowledge historical baggage. Past relationships and interactions influence present and future endeavors. Focus on present and future.**
- J. **(OVERHEAD 15) Be careful with competency issues, integrity, and invading agency boundaries. Never compromise integrity. Statements should be "I can" instead of "You should."**

- K. Build a shared vision.
- L. Expect frustration but celebrate successes.
- M. Remember that agencies change at different rates. Individuals will change before agencies. Eventually "consensus morality" will take over - if everyone is doing it, it must be O.K.

## VIII. Types of Transition Teams

- A. (OVERHEAD 16) Definition: A transition team is a group of professionals, who meet on a regular basis, to plan and coordinate services which assist students with disabilities in obtaining the most satisfactory transition possible into meaningful work and living environments upon completion of high school.
- B. (OVERHEAD 17) Community Level Team: A group of administrative level professionals from the school system and local adult service provider agencies who meet on a regular basis to oversee the quality of transition services provided by the LEA. This team does not address individual student needs. {NC Transition Manual, 59-61}

### 1. Potential Members

- a. Transition coordinator
- b. Workforce Development Education Directors
- c. Exceptional Children's Directors
- d. Vocational Rehabilitation Counselors
- e. Employment Security Commission representatives
- f. Business Representatives
- g. Director of Developmental Disabilities (Mental Health)
- h. Single Portal Representative
- i. Workforce Development Board Representative
- j. Residential Providers
- k. Advocacy Group Representatives
- l. Director of the Recreation Department/YMCA
- m. Parent Representative
- n. Department of Social Service Representative
- o. Post-secondary Education Representative from Special Student Services

### 2. Possible Responsibilities

- a. Identify community resources.
- b. Clarify roles of service providers.
- c. Seek new funding and support for existing programs.

- d. **Coordinate community awareness.**
- e. **Develop and implement interagency agreements. {NC Transition Manual, Appendix N: Interagency Agreement}**
- f. **Coordinate job development and job placements among service providers.**
- g. **Develop strategies for overcoming barriers to service delivery.**
- h. **Establish a network among service providers.**
- i. **Coordinate staff development activities.**
- j. **Make data-based future projections. Conduct needs assessments (the process of gathering information about the people with disabilities and their training needs. This information is used to establish the content and process of a transition program.**
- k. **Share information related to employment.**

**C. (OVERHEAD 18) School Level Transition Team: A group of front-line professionals from the school system and adult service agencies who provide transition-related services. This team meets on a regular basis for the purpose of assisting individual students with their transition planning. {NC Transition Manual, 61-63}**

**1. Potential Members**

- a. **Transition Coordinator**
- b. **Transition Teacher**
- c. **Student**
- d. **Parents**
- e. **General Education Teachers**
- f. **Workforce Development Education teachers**
- g. **Case Managers from Mental Health**
- h. **CAP-MR/HRI/CBI providers**
- i. **Department of Social Service case managers**
- j. **Vocational Rehabilitation School Counselor**
- k. **Community College Representatives**
- l. **Recreation Representatives**
- m. **Social Security Administrative Representatives**
- n. **Residential Providers**

**2. Responsibilities**

- a. **Conducts transition meetings and exit meetings.**
- b. **Collects and disseminates information on students. {NC Transition Manual, Appendix R: School Level**

**Information Sheet}**

- c. **Recommends changes in programming.**
- d. **Assists in resolving individual problems in service delivery.**
- e. **Discusses and addresses issues for individual transition meetings and determines additional involvement of team members needed at this level.**
- f. **Identifies areas of responsibility for team members.**
- g. **Projects post-graduate needs for individual students.**
- h. **Develops strategies for solving problems or barriers to the successful delivery of transition services.**
- i. **Evaluates transition program effectiveness.**
- j. **Provides team members with information about adult service agencies.**
- k. **Transfers case management from school to other agencies.**
- l. **Develops timelines for the delivery of services.**

**IX. Preparing for a School Level Transition Meeting {NC Transition Manual, 63-65}**

- A. **Do your homework.**
- B. **Have the student's demographic and personal information ready.**
- C. **Assist the student in identifying and clarifying needs, wants, and preferences.**
- D. **Explain the process to the student and family.**
- E. **Ensure that the student and family have had input into the organization of the meeting (agenda, members who will attend, etc.)**
- F. **Find out whether differences of opinions exist between the student and family and decide how to handle.**
- G. **Determine the date, time, and location of the meeting.**
- H. **Complete all paperwork required for exceptional children's records.**

**X. Conducting the Meeting**

**A. Person Centered Planning**

1. **(OVERHEAD 19) Quote: "It makes little (or no) sense to ask people about their desired future unless people can respond to what is wanted, and help others move toward their preferred futures." (Excerpt from "Our Hopes, Dreams, Preferences and Unrealistic Expectations by**

John Shea, Allen, Shea and Associates)

2. **(OVERHEAD 20) Definition: Person centered planning is a process in which focus in planning is on the person's dreams, hopes, wants and needs. Planning is conducted in a manner that ensures the input of the student/client and prevents services from being delivered based on what is available versus what the student desires.**
3. **Transition plans should be based on interests and strengths. Must ask questions differently. Must explore what is involved for the individual student to reach their dreams. Historically, IEPs have focused on deficits, no focus on student goals. Student-driven, not teacher driven.**
4. **(OVERHEAD 21) Benefits of Person Centered Planning**
  - a. **Results in better outcomes.**
  - b. **ITP reflects person's desired future.**
  - c. **Active student and family involvement**
    1. **equal partners in process**
    2. **opportunities to create unique plan**
    3. **plan more likely to "to fit" the student rather than "fitting" the student to a standard format**
  - d. **Improves ability to generate ideas. Ways to creatively fill gaps in services.**
  - e. **Identifies additional community resources.**
    1. **generic services**
    2. **family's support network**
    3. **circle of friends**
    4. **promotes inclusion**
5. **(OVERHEAD 22) Components of Person Centered Planning**
  - a. **Focuses on and driven by the individual's strengths, interests, and preferences. Student and family actively participate and drive the process. Helps select team.**
  - b. **Focuses on capacities and opportunities.**

Information presented in a fashion that highlights the positive. Look for opportunities to expand future vision.

- c. Establishes a vision (for the person). Use process to organize hopes, dreams, ideas, and goals. Involves student and family in decisions and choices. Think about how it "could be."
  - d. Process is flexible, dynamic, and informal. No one right way - but many ways to develop a plan. Flexible format and flexible strategies.
  - e. Requires collaborative team work. People come prepared to listen and work for solutions. Lots of brainstorming. Not a "one" person or "one" agency show.
  - f. Requires an effective facilitator. Listens, open-minded, helps to express dreams, non-judgmental, helps to advocate, encourages cooperation.
6. (OVERHEAD 23) Results of Person Centered Planning
- a. Group Support. Create possibilities and enhance quality of life. (e.g. MAP - McGill Action Planning System, GAP - Group Action Plan, Personal Futures Planning, Essential Lifestyles Planning).
  - b. Uniquely Focused Description (of the individual). Focuses on the gifts, talents, strengths and interests of the individual. What contributions can the individual make?
  - c. Development of a vision. The vision arises from the individual not from the professionals. MAPS asks all members and the individual, "What is your dream?" GAP has members share "great expectations and develop "what if" and "why not" attitudes.
  - d. Action. The group specifies action and identifies supports needed to make the vision a reality.
  - e. Empowerment for the individual.
7. (OVERHEAD 24) Limitations of Person Centered Planning
- a. It takes time to create visions and action plans.
  - b. Lack of knowledge and experience in person centered planning on the part of educators and

- parents.
- c. Stereotypical values regarding the roles that individuals with disabilities play in society.
- d. Fear of the unknown.
- e. Reluctance of system to relinquish power.
- f. Difficulty in changing traditional methods.

**B. Parental Involvement in the Meeting**

1. Since PL94-142, parents have become more involved in their children's education BUT by many high school parents' interest and involvement decreases due to "burn-out" and teenager attitudes. This is just at the time that their involvement is important due to transition.
2. **Enhancing Parental and Professional Partnerships (New Jersey Partnership for Transition from School to Adult Life for Youth With Disabilities, UAP at New Jersey University of Medicine and Dentistry) {NC Transition Manual, 47-49 Appendix K: Assessment for Parents and Appendix L: Questions Parents Can Ask}**
  - a. Discuss shared values and vision.
  - b. Assist parents and students in understanding services, terminology, regulations, etc.
  - c. Avoid professional jargon.
  - d. Meetings should be well-planned and organized.
  - e. Arrangements should be made so all members can participate and contribute. Make all meetings non-threatening.
  - f. Provide adequate notification of meetings.
  - g. Involve parents to developing agenda.
  - h. Ensure parents and students are in the communication loop.
  - i. Provide parents with information about model programs.
  - j. Allow parents and students to assume leadership roles.
  - k. Acknowledge parents and students as full partners. Include in all processes.
  - l. Accept parent and student input without judging. Listen honestly.
  - m. Give parents and students responsibilities to follow-up on after the meeting.

- n. Encourage parents to be optimistic, but realistic about the future.
- o. Encourage parents to plan early.
- p. Show parents what they can do at home to increase their child's employability.
- q. Teach advocacy skills to students and parents.
- r. Assist parents in meeting "their" needs so they will be better able to help their child.

**3. Why Is Parental Involvement Important?**

- a. Only through collaboration can real change occur.
- b. Child development and learning do not occur in a single environment and without influence from multiple sources.
- c. Student achievement is greater and longer lasting with meaningful and high levels of parental involvement.
- d. Parent involvement affects noncognitive behavior: attendance, school attitudes, maturation, self-concept and behavior.
- e. Increases effectiveness of school programs.
- f. IDEA requires involvement.
- g. Ensures continuity and provides insight into abilities, hopes and dreams. Provides holistic picture. Provides insight into coping strategies, past frustrations and support.

**4. (OVERHEAD 25) Parental Contributions {NC Transition Manual, 46-47}**

- a. **Negative Parental Influences (influences and prejudices that hinder the transition process)**
  - 1. **Mandate to continue family tradition**
    - a. depends on severity of condition
    - b. depends on parental acceptance or denial
    - c. limits options to one
  - 2. **Comparison with siblings**
    - a. usually in message of failure instead of focusing on strengths
  - 3. **Focus on monetary considerations/class snobbery**



- a. certain jobs are "beneath" family status
- b. problem of entry level jobs (blue collar vs. white collar)
- 4. Options based on sexual stereotypes
  - a. Example: Nurses can't be male/janitors can't be female

**b. Positive Parental Influences**

- 1. Commitment to personal best
  - a. allows child the dignity of risk
  - b. helps develop coordination and stamina
  - c. allows child to make own decisions
- 2. Provide experiences and information
  - a. build a "home" workshop
  - b. give child duties/chores
  - c. encourages part-time work
  - d. points out/visits jobs in the community
  - e. discusses jobs held by family and friends
  - f. works with school personnel

**5. (OVERHEAD 26) Parental Roles in Preparing Child for Adult-life**

- a. Advocates
- b. Providers of information
- c. Role models
- d. Case managers
- e. Risk takers
- f. Financial planners

**XI. Closing Comments**

- A. Interagency coordination is vital to successful transition planning. Many players must take an active role including school staff, adult service providers, and parents. The student is the central figure. Good transition planning stays focused on the student with services being delivered in a student-centered fashion.

**Now that we have discussed the issues surrounding the establishment of a transition team and conducting team meetings, we will focus on the specific services provided by the primary adult service providers.**

**Interagency Collaboration**

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**Interagency Collaboration**

A process in which two or more agencies integrate their resources to provide services to meet the needs of students and adults with disabilities.



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*“Where once there may have been barriers, rivalries and distrust, the school must foster teamwork and partnerships with adult service agencies. The partnership is not a new look at a new old battle, it is a common struggle, not separate struggles for power.”*



- Peter Scholtes

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*Adam said to Eve when leaving the Garden of Eden, "Honey, things aren't ever going to be the same!"*



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### Models of Interagency Collaboration

- Information Exchange
- Responsibility Transfer
- Collaborative Exchange



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### Importance of Collaboration

- Transition is complicated.
- No mandate for adult services.
- Need to overcome gaps in services.
- Many agencies involved in process.
- Eligibility requirements vary.
- Need to reduce duplication.
- Need for joint planning.

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## Importance of Collaboration (continued)

- Need to focus on student.
- Need to increase comfort level of parents and students.
- Ensures student is started on productive path.



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## Benefits

1. *Comprehensive and qualitative evaluation.*
2. *Avoids duplication of services.*
3. *Ensures coordination of recommendations.*
4. *Creates increased confidence.*
5. *Assists in generating reports.*
6. *Improves program placement.*
7. *Increases availability of services.*
8. *Improves community relations.*
9. *Reduces costs to schools.*
10. *Increased self-worth and dignity of students.*

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## Barriers

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| ■ Lack of vision            | ■ Failure to use person-centered planning |
| ■ Resistance to change      | ■ Lack of leadership                      |
| ■ Poor information exchange | ■ Historical baggage                      |
| ■ Lack of training          | ■ Lack of respectful relationships        |
| ■ Failure to restructure    | ■ Jealousy                                |
| ■ Turfism                   | ■ Emphasis on measurable factors          |
| ■ Bureaucracy               |   |

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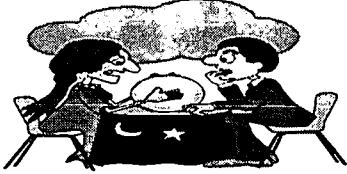
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*Our future is shaped by our past...so be very careful what you do in your past.*

-- Ziggy



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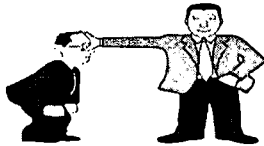
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### Barriers (continued)

- Gatekeeping
- Satisfaction with status quo
- Anxiety-Insecurity-Fear
- Costs too high and rewards inadequate
- Lack of commitment
- Lack of divisibility
- Incompatibility



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### Characteristics

- Shared mission/goals/vision.
- Climate of trust and openness.
- Open and honest communication.
- Sense of belonging.
- Diversity
- Creativity and risk-taking
- Ability to self-correct

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### Characteristics (continued)

- Members are interdependent
- Consensus decision-making
- Participatory leadership
- Fosters inclusion of the student
- Reflects a fluid and dynamic qua



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### Establishing A Team

1. Ensure a high level of optimism.
2. Develop a proposal.
3. Select appropriate people.
4. Allow time to get to know each other.
5. Get administrative support.
6. Ensure initial success.
7. Acknowledge fears.
8. Establish positive communication patterns.
9. Acknowledge historical baggage.

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### Establishing A Team

10. Be careful with competency issues, integrity, and invading boundaries.
11. Build a shared vision.
12. Expect frustration and celebrate successes.
13. Remember change occurs at different rates.



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### Transition Team

A transition team is a group of professionals who meet on a regular basis, to plan and coordinate services which assist students with disabilities in obtaining the most satisfactory transition possible into meaningful work and living environments upon completion of high school.

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### Community Level Team

A group of administrative level professionals from the school system and adult service provider agencies that meet on a regular basis to oversee the quality of transition services. This team does not address individual student needs.

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### School Level Team

A group of front-line professionals from the school system and adult service agencies who provide transition-related services. This team meets on a regular basis for the purpose of assisting individual students with their transition needs.



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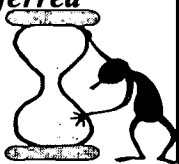
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***“It makes little or (no sense) to ask people about their desired future unless people can respond to what is wanted and help others move toward their preferred future.”***

- John Shea



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### Person-Centered Planning

Person-centered planning is a process in which focus in planning is on the person's dreams, hopes, wants and needs. Planning is conducted in a manner that ensures the input of the student and prevents services from being delivered based on what is available versus what the student desires.

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### Benefits of Person Centered Planning

- Results in better outcomes.
- ITP reflects person's desired future.
- Active student and family involvement.
- Improves ability to generate ideas.
- Identifies community resources.



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### Components of Person Centered Planning

- Focuses on individual's strengths, interests and preferences.
- Focuses on capacities and opportunities.
- Establishes a vision.
- Flexible, dynamic and informal process.
- Collaborative teamwork.
- Effective facilitator.

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### Results of Person Centered Planning

- Group support
- Uniquely focused description of student
- Development of a vision
- Action
- Empowerment



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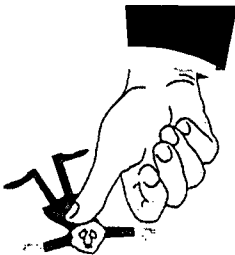
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### Limitations of Person Centered Planning



- Time involved
- Lack of knowledge and experience
- Stereotypical values
- Fear
- Reluctance to relinquish power
- Difficulty with change

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**Parental Contributions**

1. Negative Parental Influences
  - A. Mandate to continue family tradition
  - B. Comparison to siblings
  - C. Focus on money/class
  - D. Sexual stereotypes
2. Positive Parental Influences
  - A. Commitment to personal best
  - B. Provides experiences and information

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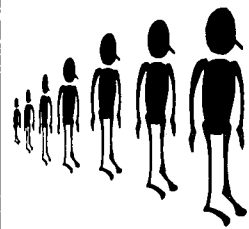
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**Parental Roles**



- Advocates
- Providers of information
- Role models
- Case managers
- Risk takers
- Financial planners

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## **Lecture 6: Adult Services**

### **I. Introduction**

- A. (OVERHEAD 2) Quote: *"I get so confused sometimes, I don't know which end is up...which really makes it difficult when I try to sit down."* (Ziggy)

### **II. Overview of Vocational Rehabilitation**

#### **A. Introduction {NC Transition Manual, 68}**

1. (OVERHEAD 3) Purpose: To assist eligible persons with disabilities to achieve gainful employment and/or increase their ability to live independently. Function is to provide a planned sequence of individualized services designed to assist persons with disabilities to reach vocational goal.
2. Vocational Rehabilitation is a key player in the transition of youth with disabilities from school to work.

#### **B. Vocational Rehabilitation Services in North Carolina**

1. Vocational Rehabilitation established in 1920. There are 52 units in our state.
2. 652 professional and 430 paraprofessional staff
3. 8.7 million spent in 3rd party school programs and more than 10 million on all disabled youth. 80% of the funding is federal.
4. Cooperative agreements with 82 of the 113 school systems which has resulted in the development of 97 school counselor positions.
5. Our state's vocational rehabilitation school program is one of the strongest in the nation (if the not the best!).

### **III. Vocational Rehabilitation Legislation**

#### **A. (OVERHEAD 4) Rehabilitation Act of 1973 (P.L. 93-112)**

1. The term vocational was removed.
2. The primary goal continued to be employment.

3. **Continued IWRP (Individual Written Rehabilitation Plan -- now called the Individual Employment Plan - IPE)**
4. **This act included Section 504 (discussed in Business/Industry lecture)**
5. **Included Section 503:**
  - a. **Any business or agency contracted by the government to provide goods or services in excess of \$2500 must have affirmative action guidelines related to the employment of individuals with disabilities.**
  - b. **Those contractors whose contracts exceed \$50,000 annually or have at least 50 employees must develop affirmative action programs.**

**B. Rehabilitation Act Amendments of 1974 (P.L. 93-516)**

1. **Title IV: Provided community services employment and projects for training the persons with severe disabilities in the "real work" settings of business and industry.**

**C. 1978 Rehabilitation Services Amendments**

1. **Issued a memorandum for state-level interagency agreements.**
2. **Collaborative implementation of IEPs and IPEs to begin at the earliest possible age.**
3. **Pertinent information should be shared between VR and the schools**

**D. 1986 Amendments to the Rehabilitation Act**

1. **Authorized supported employment**
2. **Changes made in Vocational Rehabilitation because traditional approach had not met the needs of persons who required ongoing support to maintain employment. The federal regulations for supported employment were intended to clarify certain program requirements and make other changes that were needed to increase program effectiveness and flexibility.**
3. **Called a "Choose - Place - Train - Support" model rather than the traditional model of "Train - Place."**
4. **Supported employment pulls together the time-limited**

- services of Vocational Rehabilitation with the services of other agencies responsible for on-going support to maintain employment for persons with disabilities.
5. (OVERHEAD 5) Definition of Supported Employment in the 1986 Rehabilitation amendments: {NC Transition Manual, 74-75}

*"Competitive employment in an integrated setting with on-going support services for individuals with severe handicaps for whom competitive employment has not traditionally occurred, has been interrupted, or intermittent as a result of severe handicaps or transitional employment for persons with chronic mental illness."*

a. (OVERHEAD 6) Competitive Employment

1. work must be part-time or full-time
2. hours included in IPE. Just maximum individual can handle.

b. Integrated Work Setting

1. placement must be made in a work setting with not more than 8 workers with disabilities grouped together
2. daily opportunities for integration with people with normal needs

c. Severity of Handicap

1. person must be "severely handicapped" and require on-going support to maintain job performance and retain employment

d. On-going Support

1. person's disability must constitute a need for specialized training and follow-up that only supported employment can provide
2. the need for this service rather than diagnosis is the basis for the service

e. Evaluation

1. **During the referral process, Vocational Rehabilitation will determine if the person:**

- **has not worked or only worked intermittently in competitive employment**
- **has been determined by an evaluation of rehabilitation potential to:**
  - **be eligible for Vocational Rehabilitation services including meeting classification as severely handicapped;**
  - **have a need for on-going support services in order to perform competitive employment; and**
  - **have the ability to work with supported employment**

6. **(OVERHEAD 7) Typical Supported Employment Process**

- a. **Identification (VR certifies)**
- b. **Identification of needed services (determines level)**
- c. **Screening**
  - **Once a consumer has been matched with agency, it is time to find a job.**
  - **Gathers consumer information (transportation, abilities, communication, functional academics)**
- d. **Job Development (conduct environmental analysis: locate potential employer, make contact, set up a meeting, conduct job analysis)**
- e. **Placement/Training Advocacy**
  - **Writing task analysis (when do**

- you do what, before employment, during first week)
  - Job modifications (environmental, process, machines, person)
  - Develop necessary natural and workplace supports
- f. **Follow-along**
- Determining when to fade training is a data-based decision. Not time/convenience based.
  - Typically above 80% in job performance, fading can begin and schedule for follow-along (move new ones in and maintain others)
  - During follow-along direct observation and employer evaluation provides data.

7. **(OVERHEAD 8) Supported Employment Models {NC Transition Manual, 76}**

- a. **Individual Placement:** support starts with one-on-one training by a job coach who at the onset may be responsible for doing parts of the job which the client has not learned yet. On-going monitoring and follow-up. Results in highest wages.
- b. **Enclaves/Workstations:** A group of individuals with disabilities work in an integrated setting under the direct supervision of their own specially trained supervisor (job coach). Good integration (breaks and lunch). 20% nationwide.
- c. **Mobile Work Crew:** Four to five workers receive OJT while performing landscaping/groundkeeping and custodial work. Can have individuals of varying abilities within crew. Integration difficult. May be paid by agency or employer. 17% nationwide.
- d. **Small Business (Entrepreneurial):** Provides supported employment by starting a small business. Integrated with normal needs workers. Examples: Candy



shop, restaurant, carlube, photocopy service, ice cream parlor, plant nursery.

**8. Job Coach**

a. **Job Coach Definition: a community-based professional who works in a non-profit job placement program, a public vocational or adult services program or a secondary special education program.**

b. **Duties:**

- 1) **Job Placement (job development, job matching, transportation, parental involvement, SSI)**
- 2) **Job Site Training and Advocacy (behavior, social skill training, natural supports)**
- 3) **Ongoing Monitoring (evaluation, behavioral interventions, satisfaction surveys, community skills training)**
- 4) **Follow-up and Retention (fading, follow-up, obtaining new employment when needed)**

**E. (OVERHEAD 9) Rehabilitation Act Amendments of 1992 (P.L. 102-69) {NC Transition Manual, 70}**

1. **Introduced the "presumption of capability" or the "presumption of ability."**
2. **Stated: "A person with a disability, regardless of the severity of the disability, can achieve employment and other rehabilitation goals, if the appropriate services and supports are made available."**

**(OVERHEAD 10) "A person with a disability is presumed to be capable of benefitting from Vocational Rehabilitation services unless the state agency can demonstrate by clear and convincing evidence that the individual cannot."**

**This can mean trying the person out in supported employment.**

**The presumption of ability changed the focus. Before 1986, the VR counselor had to prove a person could**

benefit from services. Now they must prove they cannot benefit from services. Subtle change, but profound implications.

F. **Order of Selection {NC Transition Manual, 70-71}**

1. **Designed to ensure the individuals with the most severe disabilities are served first. Other eligible individuals will be served to the extent that resources will allow in an order determined by the degree to which their disability impairs their vocational functioning.**
2. **At the beginning of each fiscal year, a determination will be made as to whether resources are going to be available to provide Vocational Rehabilitation services to all eligible applicants, if not only those in priority categories will be served.**
3. **Order of Selection only becomes an issue if case dollars are running out. As long as there are no financial constraints, Order of Selection is not a concern.**
4. **(OVERHEAD 11) Categories:**
  - a. **Category 1: Individuals who have the most severe disabilities. A person whose impairments seriously limit 3 or more of their functional capacities in the terms of employment outlook.**

**Functional Capacities for Order of Selection:**

- 1) **Mobility**
  - 2) **Communication**
  - 3) **Self-Help**
  - 4) **Self-Direction**
  - 5) **Interpersonal Skills**
  - 6) **Work Tolerance**
  - 7) **Work Skills**
- b. **(OVERHEAD 12) Category 2: Individuals with a severe disability. A person whose impairment seriously limits 1 or more of their functional capacities in terms of employment outlook.**
  - c. **Category 3: Individuals with a non-severe permanent disability(ies) who will need multiple vocational rehabilitation services to attain a suitable employment outcome.**
  - d. **(OVERHEAD 13) Category 4: Any eligible individual who does not qualify for placement in a high priority category.**

**G. (OVERHEAD 14) 1998 Reauthorization of the Rehabilitation Act (included in the Workforce Investment Act) August 1998**

- 1. The Workforce Investment Act (WIA) consolidated numerous employment services funded with federal dollars into state block grants:**
  - a. adult employment and training**
  - b. disadvantaged youth employment and training**
  - c. adult education and family literacy**
  
- 2. The Workforce Investment Act included the reauthorization of the Rehabilitation Act for an additional five years and maintained Vocational Rehabilitation as a separate service agency specifically for individuals with disabilities.**
  
- 3. Included in the reauthorization were several changes relevant to the area of supportive employment:**
  - a. The definition of supported employment was changed to allow sub-minimum wages to be paid if there is a clear employment goal aimed at obtaining at least minimum wage at some point in the future.**
  - b. The Individualized Written Rehabilitation Plan (IWRP) was renamed the Individual Plan of Employment (IPE). Also, Vocational Rehabilitation clients could have more authority in developing their own plan.**
  - c. If an individual is receiving SSI or SSDI they are presumed eligible for Vocational Rehabilitation services.**
  - d. Extended evaluations are replaced with opportunities for the client's work ability to be assessed through trial work experiences with appropriate supports. There is also the expectation that the trial work experiences will occur over a sufficient timeframe and in a variety of settings.**
  - e. Self-employment and telecommuting were included as avenues of employment that would be supported by Vocational Rehabilitation.**

#### **IV. Vocational Rehabilitation Services**

- A. Vocational Rehabilitation is an eligibility program, not an entitlement program. Students must be referred and meet eligibility requirements.**
- B. Students receive an assessment of medical, social, psychological, educational, and vocational factors in order to determine the individual's potential and to develop an individual plan of services. School records can be used to assist Vocational Rehabilitation in this process (if within last year).**
- C. (OVERHEAD 15) Each Vocational Rehabilitation client has an Individualized Program of Employment. {NC Transition Manual, 7 and Appendix T}**
  - a. Jointly developed between the school counselor and the student (with interagency coordination others can also be involved in this process).**
  - b. Designed to achieve employment objectives. Must have a specific vocational goal to pursue and productivity objectives with evaluative criteria.**
  - c. Consistent with the individual's strengths, priorities, abilities, and capabilities.**
  - d. Includes a statement, in the individual's words, describing how he or she was informed of and involved in choices related to:**
    - 1. employment goals**
    - 2. objectives**
    - 3. services**
    - 4. service providers**
    - 5. methods used to procure or provide services**
  - e. Includes information regarding related services and benefits. If the client is going to receive supported employment, the following information is included:**
    - 1. an hours per week work goal (no weekly limit - individual must work to his or her potential)**
    - 2. a description of the time-limited Vocational Rehabilitation services to be provided**

- 3. plan for on-going support (minimum of 2 times per month if on-site) or (minimum of 2 meetings with employee and 1 with employer if off-site)
  - 4. designation of who is going to provide long term follow-up
  - f. Is provided in the mode of communication of the individual
  - g. Agreed upon by the individual with the disability and the counselor and signed by both parties
4. **(OVERHEAD 16) Types of services provided by Vocational Rehabilitation (in addition to Supported Employment which has already been discussed): {NC Transition Manual, 72-73}**
- a. Labor Market Surveys
  - b. Job Task Analysis
  - c. Payments for work-related and educationally-related expenses: must use regular financial aid first. Disability related expenses. Can pay for training in a variety of settings including technical schools, trade schools, rehabilitation centers, colleges and universities.
  - d. Work Adjustment Training: funded by contracting with another agency. Purpose is to prepare and harden ability to sustain employment prior to placement. VR may fund 30-60 day work adjustment evaluation period prior to determining the person's suitability for VR services. May lead to transitional, supported or competitive employment. Schools can obtain vendorships from VR to provide work adjustment training on school campuses in school factories or in on-campus jobs.
  - e. Transition Job Coach or Employment Training Specialist (ETS): Provides job coaching services for youth with disabilities who are in need of short-term job coaching and who do not require long-term support. The ETS analyzes potential jobs by task and the best way to instruct students in the job. A job match is determined based on the student's interests, work skills, work tolerance and physical requirements. One-

on-one job coaching and support is provided. Positions are located in Wilson, Winston-Salem, Lumberton, and Charlotte.

- f. **On-The-Job Training (OJT):** short term training that allows a person to work on a job site while learning the duties.
- g. **Job Development and Job Placements**
- h. **Rehabilitation Engineering:** systematic application of technology to help individuals with disabilities overcome barriers in education, employment, and independent living. A rehabilitation engineer must have common sense, creativity, the ability to work with machinery for fabrication, a clear understanding of resources, good communication skills, and a sound knowledge of disabilities. No licensure required (RESNA - Rehabilitation Engineering Society of North America, Suite 700, 1101 Connecticut Ave. NW, Washington, D.C. 20236). The process for rehabilitation engineering services includes:

1. Evaluation and Assessment

- **Client Evaluation:** based on observation, interviews and consultation with the treatment team. Assesses individual strengths and makes recommendations as to how technical intervention could be used to enhance client abilities.
- **Environmental Evaluation:** visits work sites and living areas to determine what types of modifications should be made to allow for independent functioning of a consumer.
- **Equipment Evaluation:** assesses commercial aids and devices for functional use and cost effectiveness.

2. Technical Services

- **Information About Aids:** keeps abreast of trends in technology and acts as an information resource. Provides information about alternatives, their function, locations, and prices.
- **Modification of Commercial Aids:** Adjusting, fitting or developing additional component for commercial item.
- **Adaptation of a Non-Rehabilitative Device:** "Rehab-gadgeteering" -products and components available on mass market not originally designed as rehabilitative services.
- **Prototype Development:** Building an original (design alteration, model building, testing, fitting, and fabrication).

### 3. Follow-Up

- **Checking back with client to ensure satisfaction and to provide assistance with any new concerns.**

- i. **Assistive Technology**
- j. **Employer Incentive Monies**
- k. **Transitional Employment.** Used with individuals with mental illness. VR provides through contracted services. The service provider agency provides consumers with a work training setting which is outside of the service provider agency facility. The consumer may be on the agency's payroll. Used only if the consumer is targeted for supported employment. A full-time trainer must usually be provided to enable continuation of a job site.
- l. **Physical restoration services.** Assists with expenses incurred for prostheses, hearing aids, etc.

## V. **Community Rehabilitation Agencies**

**A. Introduction {NC Transition Manual, 77}**

- 1. Sheltered employment is called a "Train-Place" mode (reminder: supported employment is a choose-train-support model). Training in sheltered settings is provided to get individuals "ready" to go to work in a real job. This is what is called a readiness assumption.**
- 2. In the past there was a continuum of services (segregated, sheltered settings) that persons with disabilities moved through beginning at age 21. The flow was supposed to result in employment but this more often than not did not happen (Bellamy, T, Rhodes, L.E. Monk, D.M. & Albin, J.M. (1988). Supported employment: A community implementation guide. Baltimore, MD: Paul H. Brookes).**
- 3. Most are private, non-profit agencies. Most often programs are "mixed" rather than separate.**
- 4. Most offer a variety of comprehensive serves.**
- 5. Largely funded by Vocational Rehabilitation referrals and contract funds from the local Mental Health agency.**
- 6. Not created by federal/state/local legislation. Created by parents and organizations years ago as students with mental retardation began to age out of school programs.**

**B. (OVERHEAD 17) Types of Community Rehabilitation Agencies {NC Transition Manual, 78-79}**

- 1. Day Activity Program (ANDAP - Adult Nonambulatory Day Activity Program)**
  - a. Offers services to those viewed by local decision-makers as too severe for productive work in other settings.**
  - b. Intervals of work are short. ADL training provided.**
  - c. Arts and crafts type work in many cases.**
  - d. "Adult Daycare"**
  - e. Not many exist today as a separate entity.**
- 2. Work Activity Program (ADVP - Adult Day Vocational Program)**
  - a. One-step up (daycare and training)**
  - b. By definition, work is viewed as "inconsequential". Work is viewed as just another activity to do with other training activities.**
  - c. Provides organized developmental and vocational activities for adults with substantial developmental disabilities.**



- d. **Designed to prepare the individual to live and work as independent as possible.**
- e. **Activities and services are designed to adhere to the principles of normalization and community integration aimed at increasing age-appropriate actions, images, and appearance of individual.**
- f. **Offers a diverse variety of specific services and activities including personal and community living skill development, training in other developmental areas, use of leisure time, vocational evaluation and adjustment, work activity training, paid/remunerative work.**
- g. **Amount of time devoted to activities is based on individual needs.**
- h. **ADVP ratio is 1:10. One-on-one workers are provided with CAP-MR/DD funds, CBI funds and Thomas S. funds.**
- i. **Work comes from contracts with industries, prime manufacturing, reclamation/renovation.**
- j. **Pay is based on quality and quantity of work (subminimum wage certificate)**

### **3. Regular Sheltered Workshop Programs**

- a. **Purpose is to provide employment at a fair wage to individuals who because of their disability are not employed in a competitive job.**
- b. **One goal may be to provide training to enter competitive employment.**
- c. **Work comes from contracts with industry, prime manufacturing, reclamation/renovation.**
- d. **Pay is based on quality and quantity of work (subminimum wage certificate)**
- e. **Example: Goodwill Industries. Examples of services provided by Goodwill:**
  - 1. **Pre-employment skills screening: utilizing actual skills testing this service can determine whether job applicants have the actual skills to perform the needed job in a means acceptable by the ADA.**
  - 2. **Job Placement: Assists employers with finding qualified applicants for job openings.**
  - 3. **Supported Employment (Job Coach)**
  - 4. **Work Stations in Industry: Subcontracts an**

entire process on the job training of workers with disabilities at no expense to the employer. Service continues until the worker can meet company production schedules and may continue with additional retraining as long as the worker is employed.

5. **Goodwill's Industrial Services Division:** Subcontracts jobs for manufacturing facility. Competitively bids jobs which the employer contracts out. Capabilities include skin packaging, shrink wrap, general packaging, parts assembly, inspections and bulk mailings.
6. **Vocational Assessment**
7. **Americans With Disabilities Act Consulting Services**
8. **Careers in Banking:** This training program offers a six week program as an introduction to the banking industry. Actual skill development and training in proof encoding is provided with job placement assistance.
9. **Training Programs: Computer Programmer Training, industrial skills and fast food industries**

**C. Comparative Costs of Sheltered Settings versus Supported Employment**

1. **Adult Day Programs: First Year Annual Cost: \$5,916.00**
2. **Sheltered Workshops: First Year Annual Cost: \$3,744.00**
3. **Supported Competitive Employment: First Year Annual Cost: \$3,182.00 (Dr. John Noble, University of New York at Buffalo)**

**D. (OVERHEAD 18) Non-Rehabilitative Nature of Sheltered Employment (but note that things are slowly changing)**

1. **Work performed requires minimum learning. Training usually consists of no more than "supervision" with vague instructions and vague prompts to stay on task.**
2. **"Best" workers retained for most demanding work.**
3. **No community-training (no allotted time).**
4. **Inadequately trained personnel. Staff not trained for job development and placement.**
5. **Frequent down-time. Average worker spends less than 59% of their time working. Workers decrease productivity to**

- accommodate downtime.
- 6. No integration.
- 7. Vocational evaluations based on inferences rather than on actual observations in real community settings.
- 8. Inappropriate assumptions (e.g. clients enjoy repetitive work).
- 9. (OVERHEAD 19) Work based on contracts rather than client needs.
- 10. Old equipment (or equipment in poor working condition).
- 11. Normal workday/workweek not followed.
- 12. No systematic transition to the community.
- 13. Irrelevant exit requirements or prerequisite skill requirements are often higher than requirements for real community jobs. Only those who don't need training in the first place are placed.
- 14. Inappropriate behavior higher (8.8 times higher than in the community).

## VI. Mental Health (Developmental Disabilities Services)

### A. Introduction {NC Transition Manual, 79}

- 1. There are 40 local Area Mental Health/Developmental Disabilities/Substance Abuse Services (DMH/DD/SAS)
- 2. Some programs are cross-disability while others are disability and age specific.
- 3. Area programs report to local boards not to the Division of MH/DD/SAS.
- 4. Division of MH/DD/SAS sets minimal standards/policies, allocates funds, monitors compliance.

### B. (OVERHEAD 20) Single Portal {NC Transition Manual, 80}

- 1. Single Portal is a procedure for review of all individuals with disabilities entering and exiting services. It is a legislatively mandated plan designed to ensure coordinated, appropriate, and timely services for persons with development disabilities served in day/night, and residential services.
- 2. Any person (any age) with a developmental disability needing services of 3 or more consecutive hours in length or day/night services must be referred through Single Portal.
- 3. Single Portal is comprised of an Interagency Committee and various subcommittees (e.g. CAP-MR/DD, Birth - 3, ADVP, School Level Transition Team, etc.)
- 4. (OVERHEAD 21) Single Portal is:
  - a. required by state legislation

- b. an integration of service systems in a collaborative manner
- c. designed to track needs and avoid duplication of services
- d. not a "watch-dog" group
- e. based on a person-centered philosophy
- 5. Upon referral, information is gathered by the Single Portal Chairperson and a person-centered plan is developed. The plan is presented to the Interagency Service Review Committee (Single Portal Committee).
- 6. (OVERHEAD 22) Several outcomes can result from a Single Portal referral:
  - a. referral to another public agency
  - b. referral to a contract agency of Mental Health
  - c. referral to a private agency (not under contract with Mental Health)
  - d. no appropriate service or resources exist and individual is placed on waiting list until services are available
  - e. a number of comparable services are available and individual must make a choice
  - f. Individual is determined to be eligible for the most appropriate service option, but stays on the waiting list for a better one

**C. (OVERHEAD 23) Mental Health Services**

- 1. **The Community Alternatives Program for Persons with Mental Retardation/Developmental Disabilities (CAP-MR/DD) {NC Transition Manual, 82-83}**
  - a. A special medicaid program that was started in 1983 to serve persons with MR/DD who would otherwise require care in an intermediate care facility for the mentally retarded (ICF-MR - discussed later).
  - b. Allows individuals the opportunity to be served in the community instead of residing in an institutional setting.
  - c. All 40 area programs administer CAP-MR/DD. Local programs are responsible for operation at the local level.
  - d. CAP-MR/DD is a funding source for services. The funding is 67% federal, 5% from local DSS and the rest is from the state.
  - e. CAP-MR/DD operates under a Medicaid home and community-based services waiver granted by the

**Health Care Financing Administration (HCFA). HCFA approves the services, the number of individuals that may participate, and other aspects of the program.**

- f. Participants must be at-risk for institutionalization.**
- g. The medicaid cost for community care must be cost-effective in comparison to the cost of ICF-MR/DD care.**
- h. The CAP-MR/DD Services Branch in the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services administers CAP-MR/DD.**
- i. The Division of Medical Assistance (as the state medicaid agency) provides oversight in relation to medicaid and waiver issues.**
- j. (OVERHEAD 24) Eligibility:**

- 1. All ages (in North Carolina the youngest client is 8 months and the oldest is 83 years old).**
- 2. Must be eligible for ICF-MR level of care.**
- 3. Must be at high risk for institutionalization.**
- 4. Must meet appropriate medicaid eligibility criteria (the income and resources of parent(s) or a spouse being considered similar to the way they are considered when a person is in an ICF-MR/DD facility). Deductibles are met monthly instead of every 6 months, resulting in some Medicaid coverage each month.**
- 5. Must have a need for CAP-MR/DD services**
- 6. Consumer and family must have a desire for CAP-MR/DD services.**
- 7. (OVERHEAD 25) The resources must be available to meet the individuals needs in the community.**
- 8. The individual must be able to be maintained safely in the community within the current monthly CAP-MR/DD cost limit (\$5672.00 per month)**
- 9. Must have a MR diagnosis or DD prior to age 22.**
- 10. Must have significant limitations in 3 out of 7 areas: Self-help, Learning, Expressive Language, Independent Living, Self-direction, Mobility.**

- k. CAP-MR/DD Services:**  
**Based on an assessment of the individual's needs, the following CAP services may be considered. Each**

individual has a case manager (employee of local mental health) who arranges, coordinates, and monitors the services as well as other aspects of the individual's community care. The local Mental Health agency contracts with private providers for services:

1. Adult Day Health Care and Adult Day Care
2. Augmentative Communication Devices (\$10,000 limit)
3. Waiver supplies and equipment (adaptive positioning devices, mobility aids, aids for daily living from approved list and nutritional supplements given orally)
4. Crisis stabilization
5. Supported Living Services
6. Environmental Accessibility Adaptations from approved list
7. Vehicle Adaptations
8. In-Home Aide Services - Level I
9. MR Personal Care
10. Personal Emergency Response System
11. Personal Habilitation Services (Community Inclusion, Developmental Day Care, Family Training, Prevocational Services, Supported Employment). Almost 2/3 of CAP funds are spent in this area.
12. Respite Care (Community and Institutional)
13. Supported employment
14. Also eligible for medicaid services: Durable medical equipment (DME), home health aide, medical supplies, nursing (RN and LPN), OT, PT, Speech, prescriptions, doctor's visits, dental/vision services. Limits on doctor's visits and prescriptions are waived allowing unlimited numbers.

**Note: CAP-MR/DD services can not be used in place of funds which IDEA is responsible for covering. In order for a student to receive CAP-MR/DD services during normal school hours the student must be on homebound or have an adjusted school day.**

**Note: Many Thomas S. clients are now being served through CAP-MR/DD funds.**

2. (OVERHEAD 26) Client Behavior Intervention (CBI) {NC}

**Transition Manual, 85}**

- a. Used with adults and children (ages 6 and above) for up to 8 hours of service a day.
- b. Across disabilities but must have an Axis I (MI) diagnosis if MR. Refer to the DSM-4 manual for a complete listing of Axis I diagnosis. Deficits must be related to mental illness or at-risk for intensifying disability or ability to live in the community. Note: ADHD does qualify.
- c. Similar to High Risk Intervention - Periodic
- d. Paraprofessional level staff -- will be primary service used in school if child is over six.
- e. Can provide a wide range of habilitative services both at school, at home and in the community. Examples of services include one-on-one worker, behavioral intervention, counseling, habilitation training.

**3. High Risk Intervention - Periodic {NC Transition Manual, 85-86}**

- a. Can be used for individuals up to age 21.
- b. Must be at-risk for developing or intensifying a problem (e.g. developmental disability, parent who is developmentally disabled, parent who is a drug/alcohol abuser, etc.) and have a covered MH diagnosis.
- c. Children under the age of 6 can have paraprofessional level care but over the age of 6 requires professional level care.
- d. Schools utilize mostly for extra staff to assist with behavioral issues.
- e. Services can be delivered in the school, at home or in the community. Services can include behavioral intervention, counseling, medications, etc.
- f. Most developmental day centers use HRI.

**4. Case Management Services {NC Transition Manual, 84-85}**

- a. A support service through which planning and coordination of services are carried out in coordination with and on behalf of the individual.
- b. Designed to integrate multiple services needed or being received by a client through the area program or other agencies.
- c. Assists the individual and his family in meeting the

total needs by establishing referral to evaluation, education, vocational, residential, health, financial, social and other needed services.

- d. Case managers are assigned to all individuals who have open cases with Mental Health and before the delivery of any services.

5. (GO TO OVERHEAD 27) Residential Options {NC Transition Manual, 86}

Case managers can assist individuals in obtaining a wide variety of residential options:

a. Apartment Living

- 1. Provides varying degrees of supervision for individuals with DD who are preparing for independent living.
- 2. Counseling and technical assistance are provided as needed.
- 3. Service model may include single resident or co-resident apartments and apartment clusters.

b. Boarding House

- 1. Provides an alternative living environment for persons with DD who are not ready for independent living.
- 2. Training may be provided in the areas of health and safety, medication administration, use of community services, management of personal funds, acquisition and refinement of self-help skills, leisure activities and personalized counseling services.
- 3. Less restrictive than group homes but more restrictive than apartment living.

c. Alternative Family Living

- 1. Persons with DD live with service providers and receive "family style" supervision and monitoring of daily activities.
- 2. Service providers are supported by ongoing consultation and training from the professional staff of the Area program or contract agency.



3. **Habilitation plans are in place.**
  4. **Children served remain in the custody of parents.**
- d. **Group Homes for Adult with Developmental Disabilities (DDA Group Homes)**
1. **Provide a normalized home environment which incorporates developmental training and habilitative programming.**
  2. **May be licensed for 2 - 9 adults.**
- e. **Specialized Community Residential Centers**
1. **Provides care, treatment and developmental training for individuals who are MR or MI up to age 21.**
  2. **Through integration of medical services and close supervision, it is designed to assist individuals in attaining their highest level of independent living skills while receiving physical care.**
- f. **Intermediate Care Facilities for the Mentally Retarded (ICF-MR)**
1. **Certified as having met federal requirements for 24 hour personal care, habilitation, developmental and support services to persons with MR or DD who may have intermittent recurring needs for nursing services but who have been certified by a physician as active treatment (e.g. an aggressive effort to fulfill each resident's functional capacity) in order to be eligible for medicaid support.**
- g. **Regional Mental Retardation Centers**
1. **Five regional mental retardation centers operated by the Division of Mental Health (state level). Examples: Western Carolina, Caswell, O'Berry.**
  2. **Must be 16 years of age or older with severe or profound mental retardation.**

**6. (RETURN TO OVERHEAD 26) Respite**

- a. Provides periodic relief for a family on a temporary basis.
- b. Can be provided overnight or for periods less than 24 hours on a day or evening basis.
- c. The regional mental retardation centers offer respite upon referral by area programs.
- d. Types of Respite Services:
  1. **Out-Of-Home Care:** provided at a designated facility which has the potential for overnight care. Center may also provide respite services during the evening or for a few hours.
  2. **In-Home Care (either private home or companion):** is provided to individuals on an hourly or overnight basis. A contract between the respite provider and the Area program is developed. Private citizens serve individuals in their home. Companion respite is a support service in which a trained respite provider is scheduled to care for the individual in a variety of settings, including the client's home or other location subject to licensure.

7. Assistance with guardianship
8. Transportation: usually arranged by case managers through local transit authority.
9. Emergency commitments (crisis intervention)
10. Counseling (individual, group, family)
11. Medications/monitoring
12. Vocational services
13. Advocacy

**Note: It is helpful to investigate the specific services offered by your local Mental Health Authority and refer to these in class.**

**VII. (OVERHEAD 28) Community Colleges {NC Transition Manual, 91}**

1. The mission of the Community College system is to provide:
  1. education and training for the workforce
  2. support for economic development
  3. services to communities and individuals

2. Basic facts concerning the North Carolina Community College System
  1. Each year, one out of every six adults enrolls at a community college.
  2. Every North Carolinian is within 30 miles of a community college or satellite center.
  3. The North Carolina Community College system is the primary agency for the delivery of job training, literacy, and adult education.
  4. The average community college student is 30 years old and more than 2/3 of the students work while attending school.

C. Services

1. Compensatory Education

- a. A free, community college program designed specifically for adults (18 years and older) with mental retardation. Cooperative program between agencies.
- b. Result of a lawsuit initiated by the Arc of North Carolina (1983). The law suit was settled through the agreement that the community college system would provide compensatory education.
- c. Focus is on academic skills needed by adults with mental retardation to function independently as possible in the adult world.
- d. Goals. Students with mental retardation will:
  1. become more independent and self-directed.
  2. become more familiar with basic occupational skills.
  3. acquire skills to meet and manage community, social, work, and personal adult relationships.

2. General Education Degree (GED) Program {NC Transition Manual, 90} - a program of instruction designed to prepare adult students to pass the GED tests that lead to a high school diploma equivalency. The GED examination consists of a short open-ended writing component and the multiple choice questions. The GED program began in 1942 as a

means of certifying that veterans returning from WWII In 1998 without a high school diploma had the skills to take advantage of the post-secondary benefits in the GI Bill. In 1998, a half million Americans received their GED.

3. Adult High School Diploma (AHSD) - a program of instruction offered cooperatively with local public school systems to help students earn an adult high school diploma. The community colleges confer one out of every five of the state's high school diploma.
3. Career Counseling
4. Vocational and technical courses (students can take courses while still in high school for credit - 2+2 program. Note connection to Tech-Prep.
5. Literacy Labs
6. Study skills classes taught at local high schools
7. Placement testing
8. Special modifications for students with disabilities (refer back to Section 504 and ADA)
9. Adult Basic Education (ABE) - a program of basic skills for adults 16 years of age or older who function at less than a high school level.
10. Link in drop-out prevention programs (work with high schools to try and get drop-outs to enroll in GED programs)
11. Teen Pregnancy programs

Note: It is helpful to become familiar with the specific services offered by the community college in your area and refer to these in class.

#### VIII. Department of Social Services

- A. (OVERHEAD 29) Workfirst Program of North Carolina {NC Transition Manual, 88-89}

1. The Workfirst Program is aimed at assisting persons on welfare in getting off governmental assistance and becoming gainfully employed.
2. Program Components:
  - a. Children do not have to be on welfare to be eligible for medicaid coverage

(single mothers are often worried if they go to work that their children will lose medicaid).

- b. Most parents who leave welfare for work can receive medicaid for up to one year -- children too. This is called Transitional Medicaid.
- c. Most parents who leave welfare can receive child care expenses for at least one year. After the first year, assistance can continue to be provided if there is a need and if there is available resources.
- d. Low income families can qualify for food stamps while working fulltime.
- e. Low income working families can get more take home pay in their paycheck through Earned Income Tax Credit (EITC). Families can get part of the extra EITC money in advance with each paycheck and the rest when they file their income tax return (must file a W-5 form with employer which can be obtained from case manager) or they can get all the extra EITC money when they file their tax return. Example of EITC benefit: In 1994, a family (with two children) earning \$10,000 a year can qualify to get \$2,528 in extra take home pay. The family could get the \$2,528 when they file their taxes or they could get \$102.00 per month and the remaining \$1,304 when they file their taxes. EITC money is not counted as income for medicaid, AFDC, food stamps, SSI, or housing assistance.

B. Services:

- 1. Assistance with guardianship
- 2. Assistance with residential placement in domiciliary care homes.
- 3. Case management (if a student is receiving welfare, which may be the case if the student is an unwed mother, their case manager should attend the transition planning meetings)
- 4. Family Preservation services

IX. Social Security Administration {NC Transition}

Manual, 100-101 and Appendix U}

- A. (OVERHEAD 30) Supplemental Security Income (SSI)
  - 1. Income support program run by social security administration. Monthly benefits can be paid to eligible individuals (regardless of age) whose "disability or blindness is as severe as one that would keep an adult from working and is expected to last at least 12 months."
  
- B. (OVERHEAD 31) Social Security Disability Insurance (SSDI)
  - 1. A government insurance fund that can be paid to a person with a disability who has worked and paid into the social security system or a person without a disability whose parents or spouse paid into the social security system (after their death). May be supplemented by SSI if less than SSI amount.
  
- C. Social Security Work Incentives
  - 1. The Employment Opportunities for Disabled Americans Act (July 1, 1987)
    - a. Allows people to continue to receive SSI after their earned income is at the amount designated at the "Substantial Gainful Activity Level" (SGA). The SGA may change from year to year (1999: \$700.00 per month). SGA means work activity that involves significant physical or mental effort and is done for pay or profit. Intended to simplify requirements for recipients. The act allows for the fact that income can be expected to go up and down during the strive for independence.
    - b. When an individual begins to earn money, the SSA follows this procedure:

1. Disregards the first \$65.00 per month in earned income.
2. Provides for a \$20.00 per month general exclusion.
3. Income over \$85.00 per month is divided by two.
4. **So the SSI recipient loses one dollar for every dollar earned.**
5. Sample SSI Benefit Computation for a person receiving \$407.00 per month in SSI and earning \$585.00.

SSA disregards first \$65.00 per month (\$585.00 - \$65.00 = \$520.00)

Then there is a \$20.00 per month general (\$520.00 - \$20.00 = \$500.00)

Then the balance is divided by two. (\$500.00 divided by 2 = \$250.00)

So the individual's SSI benefit would be \$157.00 per month. (\$407.00 - \$250.00 = \$157.00)

The recipient would thus get \$742.00 per month in total income (\$585.00 (earnings) + \$157.00 (SSI) = \$742.00)

- c. The act also allows most individuals to keep medicaid after they stop receiving SSI. Medical conditions must be reviewed within 12 months of entering status 1619b. Must apply prior to SSI checks stopping.
2. (OVERHEAD 32) Impairment-Related Work Expenses (IRWE) {NC Transition Manual, 100}
    - a. IRWEs are the costs for services/materials a person needs

to be able to work.  
Services/materials can be deducted only if the person pays for the costs himself and receives no reimbursement.

- b. Examples of IRWEs include: cost of wheelchair, pacemaker, braces, artificial limbs, job coach, one-handed typewriters, electronic visual aids, braille devices, attendance care (to and from work).
- c. Services/materials must be needed due the disability. Can not be the costs a person without a disability would have if he or she had the same job.
- d. These costs are deducted from individual Substantial Gainful Activity level when calculating how much money that person should receive in his/her check. An individual can get 50% of an impairment related expenses in SSI benefits.
- e. No prior approval is needed from SSA for an IRWE. An individual simply presents the receipts for payment to SSA and the deduction is granted. No limitation as to how long use of the deduction may be continued.
- f. Sample IRWE Computation for an individual earning \$585.00 from work and receiving \$407 in SSS benefits:

- 1. The standard deductions of \$65.00 and \$20.00 still apply ( $\$585.00 - \$85.00 = \$500.00$ ).
- 2. The consumer has a \$150.00 IRWE deduction for job coaching ( $\$500.00 - \$150.00 = \$350.00$ ).
- 3. The balance is divided by two ( $\$360/2 = \$175.00$ )
- 4. The \$175.00 is deducted from \$407.00 and the individual receives \$232 in SSI benefits ( $\$407 - \$175.00 = \$232.00$ ).
- 5. The individual's income is



\$667.00 (\$585.00 + \$232.00 =  
\$817.00 - \$150.00 = \$667.00)

6. Total actual loss to the individual is \$75.00 (\$742 - \$667.00 = \$75.00).

g. May be used for SSI or SSDI

3. (OVERHEAD 33) Plan For Achieving Self-Support (PASS) {NC Transition Manual, 101 and Appendix V}. The form in the book is no longer valid. The new form is Form SSA-545-BK effective 2-99 and can be obtained from the local Social Security Office.

- a. Helps individuals accumulate resources in order to pursue a specific work goal (e.g. education, starting a business, buying work-related equipment).
- b. Examples of PASS services and supports include: transportation to job site, vehicle purchase, supported employment, work tools, work equipment, work clothes, adaptive equipment, personal assistant services.
- c. A PASS is a work incentive program that enables a person with a disability to receive earned and unearned income and to set some or all funds aside for up to 48 months. Income and resources set aside are excluded from SSI income and resource tests. SSI payments can not be set aside in a PASS. Individual must have another type of income to establish a PASS.
- d. Must be approved by SSA in advance.
- e. (OVERHEAD 34) Each PASS must include a realistic work goal, a date for achieving the goal, a clear savings and spending plan and a method for keeping track of the funds set aside. There must be specific savings plan or disbursements listed that are related to attainment of the occupational objective.

- f. Helpful to initiate prior to transitional or supported employment - but can be done after employment.
- g. A PASS is time-limited. The expectation is that by the completion of the PASS, the individual will have accomplished the goal of being more independent.
- h. Usually approved for up to 18 months, then a second 18 month extension can be granted. Finally a 12 month extension can be granted. Then if the goal was not obtained, a new goal could be established.
- i. The plan must be followed as outlined and revisions must be negotiated when appropriate.
- j. Sample PASS computation for an individual earning \$585.00 for work and \$407.00 in SSI benefits):
  1. The standard deductions of \$65.00 and \$20.00 apply ( $\$585.00 - \$85.00 = \$500.00$ ).
  2. This amount is divided by two ( $\$500.00/2 = \$250.00$ ).
  3. The PASS deduction is then subtracted ( $\$250.00 - \$150.00 = \$100.00$ ).
  4. So \$100.00 is deducted from \$407.00 (amount of SSI) and the individual receives \$307.00 in SSI benefits ( $\$407.00 - \$100.00 = \$307.00$ ).
  5. The individual's income is \$742.00 ( $\$585.00 + \$307.00 = \$892.00 - \$150.00 = \$742.00$ ).
  6. Total actual cost to the individual is zero ( $\$742.00 = \$742.00 = 0$ ).

Note: Some of the problems that have been encountered using PASSES include: 1) approval process takes too long, 2) paperwork too difficult/excessive 3) approval rates too low, 4) consumer needs don't match allowable expenses, 5) allowable sheltered income too low

to make worthwhile.  
k. Can be used only for SSI.

4. (OVERHEAD 35) Trial Work Period {NC Transition Manual, 102}
  - a. The trial work period allows each individual to test their ability to work without fear of losing social security benefits.
  - b. The trial period is 9 months which need not be consecutive. During or after the time, if the individual demonstrates the ability to earn above the SGA limit, the individual may not be considered disabled. Monetary benefits will be discontinued after a 3 month grace period.
5. Extended Period of Eligibility {NC Transition Manual, 102}
  - a. If earnings fall below SGA --- payments can be reinstated during a 39 month period. No need to reapply. Benefits reinstated without waiting period.

Note: In 1999 the SSA created the Office of Employment Support Programs in an effort to partnership with other agencies (public and private) in order to remove barriers to employment encountered by disability beneficiaries.

Note: The local Social Security office has numerous pamphlets and brochures that further explain the benefits and work incentives.

4. Ticket to Work and Work Incentives Improvement Act of 1999
  1. The law focuses on the following purposes:
    1. increasing beneficiary choice in obtaining rehabilitation and vocational services
    2. removing barriers that require

- people with disabilities to choose between health care coverage and work
3. assuring that more Americans with disabilities have the opportunity to participate in the workforce and lessen their dependence on public benefits
  2. Establishment of the Ticket to Work and Self-Sufficiency Program
    1. Will be phased in nationally over a three-year period beginning 1-1-2001.
    2. Social Security and Supplemental Security Income disability beneficiaries will receive a "ticket" which may be used to obtain VR, or other employment support services from an approved vendor list.
    3. The ticket program is voluntary.
  3. Expanded Availability of Health Care Services
    1. Gives states the option of providing Medicaid coverage to more people between 16 and 64 with disabilities who work.
    2. States will have the option of allowing individuals with incomes above 250% of the federal poverty level to buy Medicaid.
    3. Extends Medicare coverage for people with disabilities who return to work.
  4. Work Incentives Outreach Program
    1. Social Security is directed to establish a community-based work incentives planning and assistance program for the purpose of disseminating accurate information related to work incentives. Social Security will set up a corps of work incentive specialists within Social Security.

5. Expedited Reinstatement of Benefits
  1. When a person's Social Security or Supplemental Security Income disability benefits have ended because of earnings from work, he or she can request reinstatement of benefits.
  2. Beneficiaries must be unable to work because of their medical conditions.
  3. The person must file the request for reinstatement with Social Security within 60 months from the month of their termination.
  4. While Social Security is making a new determination, beneficiaries may receive up to six months of provisional benefits including Medicare and Medicaid if appropriate. If Social Security decides that the medical condition no longer prevents the individual from working, the provisional benefits paid would not be considered an overpayment.

X. (OVERHEAD 36) **Employment Security Commission**

- A. While the agency may not be represented on the school level transition team it must be involved at least at the Community Level. Students also need to be trained in the services offered by this agency.
- B. Services
  1. Information about the labor market. Job listing. Computerized service. Arranges interviews with local companies.
  2. Information about the skills needed for jobs.
  3. Assessment to determine vocational aptitudes and interests.
  4. Youth programs to aid transition.
  5. Career guidance and counseling.
  6. State Training Inventory which

identifies training programs throughout the state.

7. Occupational employment statistics.
8. Multiple resources available: Dictionary of Occupational Titles, Occupational Outlook Handbook, etc.

XI. **Workforce Investment Act (WIA) Services** {NC Transition Manual, 92}

- A. JTPA started out as CETA: The Comprehensive Employment and Training Act of 1973 (P.L. 93-203)
  1. Included Job Corps after 1978
  2. Replaced by the Job Training Partnership Act of 1982
  5. JTPA incorporated into the Workforce Investment Act of 1998 (as of July 1, 2000, all states must have in place all components of the Workforce Investment Act of 1998)
- B. Overview of the Workforce Investment Act of 1998
  1. (OVERHEAD 37) Purpose: *"To prepare youth and adults facing serious barriers to employment for participation in the labor force by providing job training and other services that will result in increased employment and earnings, increased educational and occupational skills, and decreased welfare dependency, thereby improving the quality of the workforce and enhancing the productivity and competitiveness of the nation."* (Public Law 97-300 as amended on 9-7-92; Title I, Section 2)
  2. (OVERHEAD 38) Service Delivery Areas (SDAs) are appointed by the governor to receive federal funds (500,000+ population - may be several counties together. Only 2 in NC this large, all others are 200,000 except for 2 in Western North Carolina). Note: Public Law 105-220 (8-7-98) replaced Private Industry Councils (PICs) with Workforce Development Boards.
  3. Workforce Development Boards are

appointed by local elected officials to plan job training and employment service programs in the service delivery areas.

a. Membership

1. Representatives from private sector (51%). Emphasizes private sector involvement.
2. Educational Agencies
3. Organized Labor
4. Community-Based Organizations
5. VR agencies
6. Public Assistance Agencies
7. Economic Development Agencies
8. Public Employment Service
9. Veteran agencies

b. Functions of Workforce Development Board

1. Set policy for Service Delivery Areas
  2. Guidance to Service Delivery Areas
  3. Oversight of the Service Delivery Areas and programs
  4. Determine local procedures
  5. Select grant recipients
  6. Determine procedures for development of and approval of job training plans
  7. Develop monitoring plan
6. Includes 6 separate titles including ones for vocational education, adult education, and workforce development which replaces the Carl Perkins Act, the Adult Basic Education Act, and JTPA. It maintains separate funding streams for each. It also contains amendments to Wagner-Peyser and the Vocational Rehabilitation Act.
7. Establishes the one-stop system as the access point for employment-related service (referred to as JobLink Career Centers in North Carolina). Designated one-stop partners are programs that must provide core services through the one-stop and include programs authorized under: the Wagner-Peyser Act, the Adult

Education and Literacy Act, the Vocational Rehabilitation Act, the Welfare-to-Work grants, Title V of the Older Americans Act, Postsecondary Vocational Education under the Perkins Act, Trade Adjustment Assistance, Veterans Employment Services under Chapter 41 of Title 38, Unemployment Compensation Laws, Community Service Block Grants, employment and training activities carried out under the Department of Housing and Urban Development and additional programs also may be partners in the one-stop center with the approval of the local board and local elected officials. In 1999 there were 36 centers in N.C.

8. Establishes Youth Councils. The youth Council provides expertise, establishes linkages and broadens training focus. The Youth Council makes recommendations about how the funds for youth services will be spent within the SDA.
9. Provides for operating agreements between partners, one-stop partners, one-stop operators, and local partnership to address issues such as oversight, referral, and operating costs (Comparison of key features of workforce development proposals, [www.workforce.org.com](http://www.workforce.org.com)).

C. General Goals for Workforce Investment Act

1. Job Placement
2. Employment Retention
3. Increased Earnings
4. Reduction in Number of Welfare Recipients
5. Educational Achievement and Retention
6. Employability Enhancement

D. Key Premises of Workforce Investment Act

1. Partnership
  - a. Private Sector
  - b. Government
  - c. Education
2. Shift to Local Control
  - a. Oversight by Workforce Investment



- Board in coordination with local elected officials
3. Performance Driven
    - a. Establish performance standards
  4. Focus on Training
    - a. Increase educational and occupational skill training
  5. Targeted Services {NC Transition Manual, 93}
    - a. Targeted Groups
      1. (OVERHEAD 39) Adult I (Ages 22 and over and economically disadvantaged)
        - basic skills deficient
        - school drop-out
        - recipient of cash welfare
        - offender
        - individual with a disability
        - homeless
        - food stamp recipient
      2. (OVERHEAD 40) Youth (Ages 14-21 and economically disadvantaged). Note: 30% of the funds must be spent on Out-of-School youth. Up to 5% of the youth served do not have to meet the economic eligibility requirements if they meet other criterion.
        - drop-out
        - basic skill deficient (computes or solves problems, reads, writes or speaks English at or below 8.9 or is unable to compute or solve problems, reads, writes, or speak English at a level necessary to function on the job, at home or in society.
        - pregnant or parenting
        - is an individual (including a youth with a disability) who requires additional assistance to complete an educational program or to secure and

hold employment (if the child is disabled he or she can use their "own" income instead of the families. Can not use free lunch to meet economically disadvantaged requirement.)

- homeless or runaway
- offender

E. Examples of Workforce Investment Act Services {NC Transition Manual, 94-95}

1. JOBS program: A full-time WIA worker is assigned to the Department of Social Services to work with individuals in order to speed the transition from welfare assistance to unsubsidized living through the programs offered by WIA. Job readiness classes are provided to the participants for assistance with career exploration, job seeking, and retention skills.
2. On-The-Job Training: A contractual situation between WIA and local employees whereby the employer is paid up to  $\frac{1}{2}$  of the participant's hourly wage for training. The length of training can be for up to 6 months but may vary based on the skill level of the training occupation. After the training period is completed, the participants are placed in unsubsidized employment with that employer.
3. Service Corps: Offers a combination of much needed service to local non-profit and government organizations in a catchment area. Goal is to provide education, work experience, and job placement activities for young adults 18 - 23 years of age.
4. Summer Employment Opportunities: provides direct linkages to academic and occupational learning.

This is not a stand-alone program. All youth in summer employment are provided with 12 month follow-up services. Note: Two types of summer employment opportunities are Work Experience and Youth Internships explained in items 5 and 6.

5. (OVERHEAD 41) Work Experience: planned, structured learning experiences that take place in a workplace for a limited period of time. Work experiences may be paid or unpaid. Designed to enable youth to gain exposure to the world of work and help students acquire the skills/habits needed for employment and employment advancement. Work experiences can include the following things:
  6. Instruction in employability skills or generic workplace skills such as SCANS
  7. Exposure to various aspects of an industry
  8. Progressively more complex tasks
  9. The integration of basic academic skills into the work activities
  10. Supported work, work adjustment, and other transitional activities
  11. Entrepreneurship
  12. Other elements designed to achieve the goals of work experience
  13. In most cases, on-the-job training is not an appropriate work experience activity for youth participants under the age of 18.
6. Youth Internship: Designed to assist youth 16-21 with transition from school to work (into potential career jobs). Career development, planned programs of OJT and work-based learning combined with school-based learning. Youth enter paid internships at entry level wages and continue formal education

through completion of high school subjects at the community college.

(OVERHEAD 42) Note: The Workforce Investment Act of 1998 lists youth services as including: tutoring, study skills training and instruction leading to completion of secondary school (including drop-out prevention), alternative school services, adult mentoring, paid and unpaid work experiences (internships and job shadowing), occupational skills training, leadership development opportunities, supportive services, follow-up services for not less than 12 months as appropriate, and comprehensive guidance and counseling.

## XII. Four Year Universities and Colleges

A. (OVERHEAD 43) Types of Programs To Prepare Students with Disabilities to Enter College {NC Transition Manual, 148-149}. Note: Need to contact the Disability Services Office at a college or university to determine the specific programs that are available. (HEATH Resource Center (American Council on Education) (1991). Learning disabled adults in post-secondary education. Washington, DC: Author.

### 1. The Prep Program

- a. May be pre-college year, semester or summer and is usually offered on a college campus (but may be in a secondary program).
- b. Emphasis is on diagnosing strengths and individual learning styles.
- c. Study skills and organization skills are taught.
- d. Usually a large component of individualized counseling leading to a choice of and application to a college or university.
- e. Generally very small with a class of 3 - 8.

### 2. LD Program In College and University

- a. The goal of the LD program is to teach students with learning disabilities how to manage their disability and provide the support needed for the student to ultimately function in the regular campus program, earn a degree and handle the situations.
- b. May be separate admission to the LD program (usually a fee).
- c. Emphasis is placed on individual counseling, academic advising, and identifying personal and educational strengths.
- d. An LD specialist usually coordinates the program.
- e. Diagnostic evaluation may be a part of the program.
- d. Students usually take some regular classes in the college -- for college credit.
- e. Frequently one or two non-credit courses specifically designed to enhance skills are part of the program.
- f. Social skills are often addressed in the form of peer counseling and structured opportunities for social interaction.

### 3. Regular Campus Program

- a. Many campuses admit students with learning disabilities under their regular admissions process which may be either by "open enrollment" or a selective procedures.
- b. (OVERHEAD 44) Nearly all campuses have some type of support services and modifications can be arranged. These services vary from college to college.
  - 1. Instruction in reading, writing, study skills, math, and other subjects necessary for success beyond high school.
  - 2. Personal counseling.

3. Academic advice and assistance in course selection.
4. Tutorial services and counseling.
5. Exposure to cultural events and academic programs not usually available to disadvantaged students.
6. Activities designed to acquaint students with range of career options available to them.
7. Activities designed to assist students in securing financial aid for enrollment in graduate and professional programs.
8. Mentoring programs involving faculty or upper classman.
9. Activities designed to assist students currently enrolled in 2-year programs in securing admission and financial assistance for enrollment in a four-year program.
10. Assistance with test-taking (e.g. extended time, adaptations to format, etc.)
11. Note taking services

B. Section 504 of the Rehabilitation Act

1. (OVERHEAD 45) Under Section 504 universities and colleges can not:
  - a. limit the number of students with disabilities admitted
  - b. make preadmission inquiries as to whether or not an applicant is disabled
  - c. use admission tests or criteria that inaccurately measure the academic qualifications of students with disabilities because special provisions were not made for them
  - d. exclude a qualified student with a disability from any course of study
  - e. limit eligibility to a student with a disability for financial assistance or otherwise discriminate in administering

scholarships, fellowships,  
internships, or assistantship on  
the basis of handicap

- f. counsel a student with a disability toward a more restrictive career
- g. measure student achievement using modes that adversely discriminate against a student with a disability
- h. establish rules and policies that may adversely affect students with disabilities

C. Getting Students With Learning Disabilities Ready For College

1. Make sure psychological testing is up-to-date.
2. Obtain all special testing records prior to graduation.
3. Contact Vocational Rehabilitation.
4. Vocational assessment to clarify future and present goals.
5. Make sure the student has adequate study skills.
6. Get a clear picture from high school, how much assistance the student has been getting (to determine the minimal or extensive LD services that will be needed).
7. Increase independent living skills.
8. Encourage part-time work/volunteer to increase socialization skills and understanding of work expectations.
9. Make sure the student understands own disability. Should be able to identify strengths and weaknesses and state needed accommodations.
10. Help students understand how disability is connected to social experiences with peers, family members, co-workers and employers.
11. Teach self-advocacy skills.
12. Learn about legal rights. Responsibility is the individual's to initiate the provision of services and accommodations.
13. Get information on special examination arrangements for SAT/ACT (e.g. untimed, readers, cassettes, etc.).
14. Get two copies of college applications.

15. Contact Disabled Student Services Office at colleges before applying to check on available services.
16. Visit colleges.
17. Consider starting college in the summer when things are less hectic.
18. Take care of all medical and health problems prior to enrolling in college.
19. Encourage student membership in a disability organization.
20. Make sure it is the student's choice to attend college.

D. Choosing a College or University {NC Transition Manual, 149-151}

1. What are the requirements for admission?
2. How many students with disabilities are on campus? What year are they in? Are they full-time, part-time, residents, commuters, traditional age, or older? Men? Women? Can they be contacted?
3. What are the goals and objectives of the program?
4. What services are provided? Is there a charge for them? How does one obtain such services?
5. What specialized training in disabilities do the professors have?
6. Is tutoring and/or counseling provided on a one-on-one basis or in a group? If in a group, how large is it? How frequently and intensively is it available.
7. What supervision is provided for non-certified instructors or tutors?
8. How is the duration of services determined? Is it usually one semester? One year? Two or longer?
9. Who will be my academic advisor and what training will this individual have in disabilities?
10. Do students with disabilities take regular college courses? For credit?
11. Any courses unavailable to students with disabilities?
12. What modifications have faculty or administrators been willing to make for students with disabilities?
13. Are there courses required of students



- with disabilities? If so, do they carry college credit and does the credit count toward graduation?
14. How many students with disabilities have graduated from this college? In what fields? What have they done since graduation? (Zaccarine, D. & Stewart, A. (1991). Questions to ask when visiting a college. Cullowhee, NC: Western Carolina University). (Higher Education Consortium on Learning Disabilities, 1991). (Barr, V.M., Hartman, R.C. & Spillone, S.A. (1995). Getting ready for college: High school students with learning disabilities. Washington, DC: HEATH Resource Center.

Suggested Videos:

1. In Their Own Words (Project Extra) General College-University of Minnesota, 140 Appleby Hall, 128 Pleasant Street, SE, Minneapolis, MN 55455 (612) 625-5366. This video presents positive role models of students with learning disabilities who have been successful in post-secondary education. Comes with a study guide filled with suggested activities and resources. (25 minutes)
2. College: A Viable Option (Transition Project, University of Utah) Interface Video Systems, 1233 20th Street NW, Washington, DC 20036 (202) 861-0500. Discusses post-secondary education as an future option for high school students with learning disabilities. Also gives a brief overview of learning disabilities. (20 minutes)
3. Promises To Keep (from the Graduating from Independence Notebook). Department of Health and Human Resources, SSA: Office of Disability, Room 545 Altmeyer Building, 6401 Security Blvd., Baltimore, MD 21235 (410) 965-5419. Presents a brief overview of the SSI work incentives. (15 minutes)
4. Business Sponsored Supported Employment (Trans-Center) Horizons, Inc. 108 Elden Street, Suite 10, Herndon, VA 22070 (703) 478-2700. Presents a brief overview of supported employment. (7 minutes)
5. Employability: Integrating People With DD into the

Workplace Woolworth Corporation. Can order through the national Arc. Hosted by Ann Turnbull and James Earl Jones. Presents inspiring portrayals of several individuals who are moderately to severely handicapped working in competitive employment. Shows the positive role of supported employment. Also addresses transition planing and parental involvement. (30 minutes)

Adult Services

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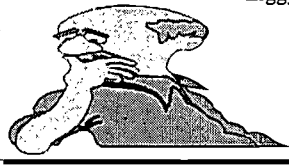
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*"I get so confused sometimes, I don't know which end is up... which makes it really difficult when I try to sit down."*  
-- Ziggy



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Vocational Rehabilitation

To assist eligible persons with disabilities to achieve gainful employment and/or increase their ability to live independently. Function is to provide a planned sequence of individualized services designed to assist persons with disabilities reach a vocational goal.

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### VR Services

■ Labor Market Surveys	■ Job Development
■ Job Task Analysis	■ Job Placement
■ Work-Related Payments and Educationally-Related Expenses	■ Rehabilitation Engineering
■ Work Adjustment	■ Monthly Allowance
■ Transition Job Coach	■ Assistive Technology
■ On-The-Job Training	■ Employer Incentives
	■ Transitional Employment

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### Individualized Plan for Employment (IPE)

- Jointly developed.
- Designed to achieve employment objectives based on strengths, priorities, abilities and capabilities.
- Informed choice.
- Information regarding related services/benefits.

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### Order Of Selection

- Category 1: Individuals who have the most severe disabilities.
- Category 2: Individuals with a severe disability.
- Category 3: Individuals with a non-severe permanent disability(ies) will need multiple vocational rehabilitation to attain a suitable employment outcome.

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Order Of Selection  
(continued)

- Category 4: Any eligible individual who does not qualify for placement in a high priority category.



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Rehabilitation Act  
Amendments of 1992  
(P.L. 102-69)

A person with a disability, regardless of the severity of the disability, can achieve employment and other rehabilitation goals, if the appropriate services and supports are made available.

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Rehabilitation Act  
Amendments of 1992  
(P.L. 102-69)

**A person with a disability is presumed to be capable of benefiting from Vocational Rehabilitation services unless the state agency can demonstrate by clear and convincing evidence that the individual cannot.**

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## Supported Employment

Competitive employment in an integrated setting with on-going support services for individuals with severe handicaps for whom competitive employment has not traditionally occurred, has been interrupted, or intermittent as a result of severe handicaps or transitional employment for persons with chronic mental illness.

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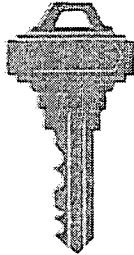
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## Key Elements of Supported Employment

- Competitive Employment
- Integrated Work Setting
- Severity of Handicap
- On-Going Support
- Evaluation



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## Supported Employment Process

- Identification of Individual
- Identification of Services
- Screening
- Job Development
- Placement/Training/Advocacy
- Follow-Along

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## Supported Employment Models



- Individual Placement
- Enclave
- Mobile Work Crew
- Small Business or Entrepreneurial

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## Single Portal

**A procedure for review of all individuals with disabilities entering and exiting services. Legislatively mandated plan designed to ensure coordinated, appropriate, and timely services for persons with developmental disabilities served in day/night and residential services.**

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## Single Portal is:

- Required through legislation by the state
- An integration of service systems in a collaborative manner
- Designed to track needs and avoid duplication of services
- Not a "watch-dog" group
- Based on a person-centered philosophy

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### Single Portal Outcomes

- Referral to another public agency
- Referral to a contract agency
- Referral to a private agency
- Placement on a waiting list (to wait due to lack of service or by choice to get a better service)
- Individual offered several services and must make a choice

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### Community Rehabilitation Agencies (CRA)

- Day Activity Programs (ANDAP - Adult Nonambulatory Day Activity Program)
- Work Activity Program (ADVP - Adult Day Vocational Program)
- Regular Sheltered Workshop Program

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### Non-Rehabilitation Nature of CRAs

1. Work requires minimum learning.
2. "Best" workers retained.
3. No community training.
4. Inadequately trained personnel.
5. Frequent downtime.
6. No integration.
7. Vocational evaluations based on inferences.
8. Inappropriate assumptions.

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### Non-rehabilitative Nature (continued)

- 9. Work based on contracts.
- 10. Old equipment.
- 11. Normal workday/work week not followed.
- 12. No systematic transition to community.
- 13. Irrelevant exit requirements.
- 14. Inappropriate behavior higher.

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### Mental Health Services

- Client Behavior Intervention (CBI)
- High Risk Intervention (HRI)
- Case Management
- Residential Options
- Respite
- Assistance with guardianship
- Transportation
- Emergency commitment
- Counseling
- Medications



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### Community Alternatives Program for Persons With Mental Retardation/ Developmental Disabilities (CAP-MR/DD)

A special medicaid program allowing persons to be served in the community who would otherwise require care in an Intermediate Care Facility for the Mentally Retarded (ICF-MR).

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### CAP-MR/DD Eligibility

- All ages.
- Must be eligible for ICF-MR level of care.
- Must be at high risk for institutionalization.
- Must meet appropriate medicaid eligibility.
- Must have a need for services.
- Consumer and family must have a desire for services.

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### CAP-MR/DD Eligibility (continued)

- Resources must be available to meet the individual needs in the community.
- Must be able to be maintained safely in the community within the current monthly CAP-MR/DD cost.
- Must have MR or DD diagnosis prior to age 22.
- Must have significant limitations.

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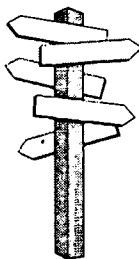
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### Residential Living Options

- Apartment Living
- Boarding House
- Alternate Family Living
- DDA Group Homes
- Specialized Residential Centers
- ICF-MR Facilities
- Regional MR Centers



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**Dept. of Social Services  
Work First Program**

**Aimed at assisting persons on welfare in getting off governmental assistance and becoming gainfully employed.**

- ◆ **Transitional Medicaid**
- ◆ **Assistance with Childcare**
- ◆ **Food Stamps**
- ◆ **Earned Income Tax Credit**

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**Supplemental Security  
Income (SSI)**

**Income support program run by SSA. Monthly benefits can be paid to eligible individuals (regardless of age) whose "disability or blindness" is as severe as one that would keep an adult from working and is expected to last at least 12 months.**

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**Social Security Disability  
Insurance (SSDI)**

**A government insurance fund that can be paid to a person with a disability who has worked and paid into the social security system or a person without a disability whose parents or spouse paid into the social security system (after their death).**

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### Impairment-Related Work Expenses (IRWE)

- Costs for services/materials a person needs to be able to work. Costs can be deducted if services are needed due to disability.
- Examples: wheelchairs, braces, job coach, equipment, prosthetics, attendant care, etc.

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### Plan For Achieving Self-Support (PASS)

- Allows person to pursue specific work goal.
- Examples: transportation to work, vehicle purchase/modification, supported employment, work tools, personal assistant.
- Allows a person with a disability to set aside some or all income for up to 48 months. Funds are excluded from resource tests. Must have income other than SSI.

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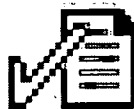
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### PASS (continued)

- PASS must be pre-approved. Must have clear goal, savings/spending plan and method of accountability.
- Time-limited (usually 18 months but can be extended).



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**Employment Security Commission**

- Labor Market Information
- Job Requirements
- Vocational Assessment
- Career Guidance and Counseling
- State Training Inventory
- Occupational Employment Statistics
- Resource Library



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**Workforce Investment Act (WIA)**

- Workforce Development Boards (formerly called Private Industry Councils) plan the job training and employment services in the SDA.
- Workforce Development Boards are composed of representatives from business, education, VR, and employment agencies.

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**WIA Youth Services**

- Tutoring
- Study skills Training
- Instruction to complete HS program
- Adult Mentoring
- Paid & unpaid work experience
- Occupational skills training
- Follow-up for 12 months

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## Community College Services

- Compensatory Education
- GED Program
- Career Counseling
- Vocational and Technical Courses
- Literacy Labs
- Study Skills Classes
- Placement Testing
- Special Modifications
- Adult Basic Education
- Link In Drop-Out Prevention
- Teen Pregnancy

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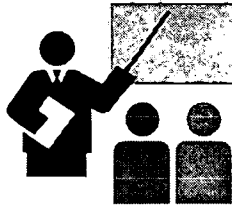
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## Preparatory Programs for College-Bound Students



- The Prep Program
- LD Program in a College or University
- Regular Campus Program

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## Support Services

- Remedial instruction
- Personal counseling
- Academic advising
- Tutorial services
- Cultural events
- Assistance with financial aid
- Peer mentoring
- Assistance with admission



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## Lecture 7: Adult Services

### I. Introduction

- A. (OVERHEAD 2) Quote: *"I get so confused sometimes, I don't know which end is up...which really makes it difficult when I try to sit down."* (Ziggy)

### II. Overview of Vocational Rehabilitation

A. Introduction {NC Transition Manual, 68}

1. (OVERHEAD 3) Purpose: To assist eligible persons with disabilities to achieve gainful employment and/or increase their ability to live independently. Function is to provide a planned sequence of individualized services designed to assist persons with disabilities to reach vocational goal.
2. Vocational Rehabilitation is a key player in the transition of youth with disabilities from school to work.

B. Vocational Rehabilitation Services in North Carolina

1. Vocational Rehabilitation established in 1920. There are 52 units in our state.
2. 652 professional and 430 paraprofessional staff
3. 8.7 million spent in 3rd party school programs and more than 10 million on all disabled youth. 80% of the funding is federal.
4. Cooperative agreements with 82 of the 118 school systems which has resulted in the development of 97 school counselor positions.
5. Our state's vocational rehabilitation school program is one of the strongest in the nation (if the not the best!).

### III. Vocational Rehabilitation Legislation

A. (OVERHEAD 4) Rehabilitation Act of 1973 (P.L. 93-112)

1. The term vocational was removed.
2. The primary goal continued to be employment.
3. Continued IWRP (Individual Written Rehabilitation Plan - now called the Individual Employment Plan - IPE)

4. This act included Section 504 (discussed in Business/Industry lecture)
  5. Included Section 503:
    - a. Any business or agency contracted by the government to provide goods or services in excess of \$2500 must have affirmative action guidelines related to the employment of individuals with disabilities.
    - b. Those contractors whose contracts exceed \$50,000 annually or have at least 50 employees must develop affirmative action programs.
- B. Rehabilitation Act Amendments of 1974 (P.L. 93-516)
1. Title IV: Provided community services employment and projects for training the persons with severe disabilities in the "real work" settings of business and industry.
- C. 1978 Rehabilitation Services Amendments
1. Issued a memorandum for state-level interagency agreements.
  2. Collaborative implementation of IEPs and IPEs to begin at the earliest possible age.
  3. Pertinent information should be shared between VR and the schools
- D. 1986 Amendments to the Rehabilitation Act
1. Authorized supported employment
  2. Changes made in Vocational Rehabilitation because traditional approach had not met the needs of persons who required ongoing support to maintain employment. The federal regulations for supported employment were intended to clarify certain program requirements and make other changes that were needed to increase program effectiveness and flexibility.
  3. Called a "Choose - Place - Train - Support" model rather than the traditional model of "Train - Place."
  4. Supported employment pulls together the time-limited services of Vocational Rehabilitation with the services of other agencies responsible for on-going support to maintain employment for persons with disabilities.



5. (OVERHEAD 5) Definition of Supported Employment in the 1986 Rehabilitation amendments: {NC Transition Manual, 74-75}

*"Competitive employment in an integrated setting with on-going support services for individuals with severe handicaps for whom competitive employment has not traditionally occurred, has been interrupted, or intermittent as a result of severe handicaps or transitional employment for persons with chronic mental illness:"*

a. (OVERHEAD 6) Competitive Employment

1. work must be part-time or full-time
2. hours included in IPE. Just maximum individual can handle.

b. Integrated Work Setting

1. placement must be made in a work setting with not more than 8 workers with disabilities grouped together
2. daily opportunities for integration with people with normal needs

c. Severity of Handicap

1. person must be "severely handicapped" and require on-going support to maintain job performance and retain employment

d. On-going Support

1. person's disability must constitute a need for specialized training and follow-up that only supported employment can provide
2. the need for this service rather than diagnosis is the basis for the service

e. Evaluation

1. During the referral process, Vocational Rehabilitation will determine if the person:

has not worked or only worked  
intermittently in competitive  
employment

has been determined by an  
evaluation of rehabilitation potential  
to:

- be eligible for Vocational  
Rehabilitation services  
including meeting  
classification as severely  
handicapped;
- have a need for on-going  
support services in order to  
perform competitive  
employment; and
- have the ability to work with  
supported employment

6. (OVERHEAD 7) Typical Supported Employment  
Process

- a. Identification (VR certifies)
- b. Identification of needed services  
(determines level)
- c. Screening
  - Once a consumer has been matched  
with agency, it is time to find a job.
  - Gathers consumer information  
(transportation, abilities,  
communication, functional  
academics)
- d. Job Development (conduct environmental  
analysis: locate potential employer, make  
contact, set up a meeting, conduct job  
analysis)
- e. Placement/Training Advocacy
  - Writing task analysis (when do you  
do what, before employment, during  
first week)
  - Job modifications (environmental,  
process, machines, person)
  - Develop necessary natural and  
workplace supports
- f. Follow-along

- Determining when to fade training is a data-based decision. Not time/convenience based.
- Typically above 80% in job performance, fading can begin and schedule for follow-along (move new ones in and maintain others)
- During follow-along direct observation and employer evaluation provides data.

7. (OVERHEAD 8) Supported Employment Models  
{NC Transition Manual, 76}

- a. Individual Placement: support starts with one-on-one training by a job coach who at the onset may be responsible for doing parts of the job which the client has not learned yet. On-going monitoring and follow-up. Results in highest wages.
- b. Enclaves/Workstations: A group of individuals with disabilities work in an integrated setting under the direct supervision of their own specially trained supervisor (job coach). Good integration (breaks and lunch). 20% nationwide.
- c. Mobile Work Crew: Four to five workers receive OJT while performing landscaping/groundkeeping and custodial work. Can have individuals of varying abilities within crew. Integration difficult. May be paid by agency or employer. 17% nationwide.
- d. Small Business (Entrepreneurial): Provides supported employment by starting a small business. Integrated with normal needs workers. Examples: Candy shop, restaurant, carlube, photocopy service, ice cream parlor, plant nursery.

8. Job Coach

- a. Job Coach Definition: a community-based professional who works in a non-profit job placement program, a public vocational or

adult services program or a secondary special education program.

b. Duties:

- 1) Job Placement (job development, job matching, transportation, parental involvement, SSI)
- 2) Job Site Training and Advocacy (behavior, social skill training, natural supports)
- 3) Ongoing Monitoring (evaluation, behavioral interventions, satisfaction surveys, community skills training)
- 4) Follow-up and Retention (fading, follow-up, obtaining new employment when needed)

E. (OVERHEAD 9) Rehabilitation Act Amendments of 1992 (P.L. 102-69) {NC Transition Manual, 70}

1. Introduced the "presumption of capability" or the "presumption of ability."
2. Stated: *"A person with a disability, regardless of the severity of the disability, can achieve employment and other rehabilitation goals, if the appropriate services and supports are made available."*

(OVERHEAD 10) *"A person with a disability is presumed to be capable of benefiting from Vocational Rehabilitation services unless the state agency can demonstrate by clear and convincing evidence that the individual cannot."*

This can mean trying the person out in supported employment.

The presumption of ability changed the focus. Before 1986, the VR counselor had to prove a person could benefit from services. Now they must prove they cannot benefit from services. Subtle change, but profound implications.

F. Order of Selection {NC Transition Manual, 70-71}

1. Designed to ensure the individuals with the most severe disabilities are served first. Other eligible individuals will be served to the extent that resources will allow in an

order determined by the degree to which their disability impairs their vocational functioning.

2. At the beginning of each fiscal year, a determination will be made as to whether resources are going to be available to provide Vocational Rehabilitation services to all eligible applicants, if not only those in priority categories will be served.
3. Order of Selection only becomes an issue if case dollars are running out. As long as there are no financial constraints, Order of Selection is not a concern.
4. (OVERHEAD 11) Categories:
  - a. Category 1: Individuals who have the most severe disabilities. A person whose impairments seriously limit 3 or more of their functional capacities in the terms of employment outlook.

Functional Capacities for Order of Selection:

- 1) Mobility
- 2) Communication
- 3) Self-Help
- 4) Self-Direction
- 5) Interpersonal Skills
- 6) Work Tolerance
- 7) Work Skills

- b. (OVERHEAD 12) Category 2: Individuals with a severe disability. A person whose impairment seriously limits 1 or more of their functional capacities in terms of employment outlook.
  - c. Category 3: Individuals with a non-severe permanent disability(ies) who will need multiple vocational rehabilitation services to attain a suitable employment outcome.
  - d. (OVERHEAD 13) Category 4: Any eligible individual who does not qualify for placement in a high priority category.
- G. (OVERHEAD 14) 1998 Reauthorization of the Rehabilitation Act (included in the Workforce Investment Act) August 1998
1. The Workforce Investment Act (WIA) consolidated numerous employment services funded with federal dollars into state block grants:
    - a. adult employment and training

- b. disadvantaged youth employment and training
  - c. adult education and family literacy
2. The Workforce Investment Act included the reauthorization of the Rehabilitation Act for an additional five years and maintained Vocational Rehabilitation as a separate service agency specifically for individuals with disabilities.
3. Included in the reauthorization were several changes relevant to the area of supportive employment:
- a. The definition of supported employment was changed to allow sub-minimum wages to be paid if there is a clear employment goal aimed at obtaining at least minimum wage at some point in the future.
  - b. The Individualized Written Rehabilitation Plan (IWRP) was renamed the Individual Plan of Employment (IPE). Also, Vocational Rehabilitation clients could have more authority in developing their own plan.
  - c. If an individual is receiving SSI or SSDI they are presumed eligible for Vocational Rehabilitation services.
  - d. Extended evaluations are replaced with opportunities for the client's work ability to be assessed through trial work experiences with appropriate supports. There is also the expectation that the trial work experiences will occur over a sufficient timeframe and in a variety of settings.
  - e. Self-employment and telecommuting were included as avenues of employment that would be supported by Vocational Rehabilitation.

#### IV. Vocational Rehabilitation Services

- A. Vocational Rehabilitation is an eligibility program, not an entitlement program. Students must be referred and meet eligibility requirements.
- B. Students receive an assessment of medical, social, psychological, educational, and vocational factors in order to determine the individual's potential and to develop an individual plan of services. School records can be used to

assist Vocational Rehabilitation in this process (if within last year).

C. (OVERHEAD 15) Each Vocational Rehabilitation client has an Individualized Program of Employment. {NC Transition Manual, 7 and Appendix T}

- a. Jointly developed between the school counselor and the student (with interagency coordination others can also be involved in this process).
- b. Designed to achieve employment objectives. Must have a specific vocational goal to pursue and productivity objectives with evaluative criteria.
- c. Consistent with the individual's strengths, priorities, abilities, and capabilities.
- d. Includes a statement, in the individual's words, describing how he or she was informed of and involved in choices related to:
  1. employment goals
  2. objectives
  3. services
  4. service providers
  5. methods used to procure or provide services
- e. Includes information regarding related services and benefits. If the client is going to receive supported employment, the following information is included:
  1. an hours per week work goal (no weekly limit - individual must work to his or her potential)
  2. a description of the time-limited Vocational Rehabilitation services to be provided
  3. plan for on-going support (minimum of 2 times per month if on-site) or (minimum of 2 meetings with employee and 1 with employer if off-site)
  4. designation of who is going to provide long term follow-up
- f. Is provided in the mode of communication of the individual
- g. Agreed upon by the individual with the disability and the counselor and signed by both parties

4. (OVERHEAD 16) Types of services provided by Vocational Rehabilitation (in addition to Supported Employment which has already been discussed): {NC Transition Manual, 72-73}

- a. Labor Market Surveys
- b. Job Task Analysis
- c. Payments for work-related and educationally-related expenses: must use regular financial aid first. Disability related expenses. Can pay for training in a variety of settings including technical schools, trade schools, rehabilitation centers, colleges and universities.
- d. Work Adjustment Training: funded by contracting with another agency. Purpose is to prepare and harden ability to sustain employment prior to placement. VR may fund 30-60 day work adjustment evaluation period prior to determining the person's suitability for VR services. May lead to transitional, supported or competitive employment. Schools can obtain vendorships from VR to provide work adjustment training on school campuses in school factories or in on-campus jobs.
- e. Transition Job Coach or Employment Training Specialist (ETS): Provides job coaching services for youth with disabilities who are in need of short-term job coaching and who do not require long-term support. The ETS analyzes potential jobs by task and the best way to instruct students in the job. A job match is determined based on the student's interests, work skills, work tolerance and physical requirements. One-on-one job coaching and support is provided. Positions are located in Wilson, Winston-Salem, Lumberton, and Charlotte.
- f. On-The-Job Training (OJT): short term training that allows a person to work on a job site while learning the duties.
- g. Job Development and Job Placements
- h. Rehabilitation Engineering: systematic application of technology to help individuals with disabilities overcome barriers in education, employment, and independent living. A rehabilitation must have common sense, creativity, the ability to work with machinery for fabrication, a clear understanding of



resources, good communication skills, and a sound knowledge of disabilities. No licensure required (RESNA - Rehabilitation Engineering Society of North America, Suite 700, 1101 Connecticut Ave. NW, Washington, D.C. 20236). The process for rehabilitation engineering services includes:

1. Evaluation and Assessment

Client Evaluation: based on observation, interviews and consultation with the treatment team. Assesses individual strengths and makes recommendations as to how technical intervention could be used to enhance client abilities.

Environmental Evaluation: visits worksites and living areas to determine what types of modifications should be made to allow for independent functioning of a consumer.

Equipment Evaluation: assesses commercial aids and devices for functional use and cost effectiveness.

2. Technical Services

Information About Aids: keeps abreast of trends in technology and acts as an information resource.

Provides information about alternatives, their function, locations, and prices.

Modification of Commercial Aids: Adjusting, fitting or developing additional component for commercial item.

Adaptation of a Non-Rehabilitative Device: "Rehab-gadgeteering" - products and components available on mass market not originally designed as rehabilitative services.

Prototype Development: Building an original (design alteration, model building, testing, fitting, and fabrication).

3. Follow-Up

Checking back with client to ensure satisfaction and to provide assistance with any new concerns.

- i. Assistive Technology
- j. Employer Incentive Monies
- k. Transitional Employment. Used with individuals with mental illness. VR provides through contracted services. The service provider agency provides consumers with a work training setting which is outside of the service provider agency facility. The consumer may be on the agency's payroll. Used only if the consumer is targeted for supported employment. A full-time trainer must usually be provided to enable continuation of a job site.
- l. Physical restoration services. Assists with expenses incurred for prothesis, hearing aids, etc.

V. Community Rehabilitation Agencies

A. Introduction {NC Transition Manual, 77}

- 1. Sheltered employment is called a "Train-Place" mode (reminder: supported employment is a choose-train-support model). Training in sheltered settings is provided to get individuals "ready" to go to work in a real job. This is what is called a readiness assumption.
- 2. In the past there was a continuum of services (segregated, sheltered settings) that persons with disabilities moved through beginning at age 21. The flow was supposed to result in employment but this more often than not did not happen (Bellamy, T, Rhodes, L.E. Monk, D.M. & Albin, J.M. (1988). Supported employment: A community implementation guide. Baltimore, MD: Paul H. Brookes).
- 3. Most are private, non-profit agencies. Most often programs are "mixed" rather than separate.
- 4. Most offer a variety of comprehensive serves.
- 5. Largely funded by Vocational Rehabilitation referrals and contract funds from the local Mental Health agency.

6. Not created by federal/state/local legislation. Created by parents and organizations years ago as students with mental retardation began to age out of school programs.

B. (OVERHEAD 17) Types of Community Rehabilitation Agencies {NC Transition Manual, 78-79}

1. Day Activity Program (ANDAP - Adult Nonambulatory Day Activity Program)
  - a. Offers services to those viewed by local decision-makers as too severe for productive work in other settings.
  - b. Intervals of work are short. ADL training provided.
  - c. Arts and crafts type work in many cases.
  - d. "Adult Daycare"
  - e. Not many exist today as a separate entity.
2. Work Activity Program (ADVP - Adult Day Vocational Program)
  - a. One-step up (daycare and training)
  - b. By definition, work is viewed as "inconsequential". Work is viewed as just another activity to do with other training activities.
  - c. Provides organized developmental and vocational activities for adults with substantial developmental disabilities.
  - d. Designed to prepare the individual to live and work as independent as possible.
  - e. Activities and services are designed to adhere to the principles of normalization and community integration aimed at increasing age-appropriate actions, images, and appearance of individual.
  - f. Offers a diverse variety of specific services and activities including personal and community living skill development, training in other developmental areas, use of leisure time, vocational evaluation and adjustment, work activity training, paid/remunerative work.
  - g. Amount of time devoted to activities is based on individual needs.
  - h. ADVP ratio is 1:10. One-on-one workers are provided with CAP-MR/DD funds, CBI funds and Thomas S. funds.
  - i. Work comes from contracts with industries, prime manufacturing, reclamation/renovation.

- j. Pay is based on quality and quantity of work (subminimum wage certificate)

### 3. Regular Sheltered Workshop Programs

- a. Purpose is to provide employment at a fair wage to individuals who because of their disability are not employed in a competitive job.
- b. One goal may be to provide training to enter competitive employment.
- c. Work comes from contracts with industry, prime manufacturing, reclamation/renovation.
- d. Pay is based on quality and quantity of work (subminimum wage certificate)
- e. Example: Goodwill Industries. Examples of services provided by Goodwill:
  - 1. Pre-employment skills screening: utilizing actual skills testing this service can determine whether job applicants have the actual skills to perform the needed job in a means acceptable by the ADA.
  - 2. Job Placement: Assists employers with finding qualified applicants for job openings.
  - 3. Supported Employment (Job Coach)
  - 4. Work Stations in Industry: Subcontracts an entire process on the job training of workers with disabilities at no expense to the employer. Service continues until the worker can meet company production schedules and may continue with additional retraining as long as the worker is employed.
  - 5. Goodwill's Industrial Services Division: Subcontracts jobs for manufacturing facility. Competitively bids jobs which the employer contracts out. Capabilities include skin packaging, shrink wrap, general packaging, parts assembly, inspections and bulk mailings.
  - 6. Vocational Assessment
  - 7. Americans With Disabilities Act Consulting Services
  - 8. Careers in Banking: This training program offers a six week program as an introduction to the banking industry. Actual skill development and training in proof encoding is provided with job placement assistance.

9. Training Programs: Computer Programmer  
Training, industrial skills and fast food industries

C. Comparative Costs of Sheltered Settings versus Supported Employment

1. Adult Day Programs: First Year Annual Cost: \$5,916.00
2. Sheltered Workshops: First Year Annual Cost: \$3,744.00
3. Supported Competitive Employment: First Year Annual Cost: \$3,182.00 (Dr. John Noble, University of New York at Buffalo)

D. (OVERHEAD 18) Non-Rehabilitative Nature of Sheltered Employment  
(but note that things are slowly changing)

1. Work performed requires minimum learning. Training usually consists of no more than "supervision" with vague instructions and vague prompts to stay on task.
2. "Best" workers retained for most demanding work.
3. No community-training (no allotted time).
4. Inadequately trained personnel. Staff not trained for job development and placement.
5. Frequent down-time. Average worker spends less than 59% of their time working. Workers decrease productivity to accommodate downtime.
6. No integration.
7. Vocational evaluations based on inferences rather than on actual observations in real community settings.
8. Inappropriate assumptions (e.g. clients enjoy repetitive work).
9. (OVERHEAD 19) Work based on contracts rather than client needs.
10. Old equipment (or equipment in poor working condition).
11. Normal workday/workweek not followed.
12. No systematic transition to the community.
13. Irrelevant exit requirements or prerequisite skill requirements are often higher than requirements for real community jobs. Only those who don't need training in the first place are placed.
14. Inappropriate behavior higher (8.8 times higher than in the community).

VI. Mental Health (Developmental Disabilities Services)

A. Introduction {NC Transition Manual, 79}

1. There are 40 local Area Mental Health/Developmental Disabilities/Substance Abuse Services (DMH/DD/SAS)
2. Some programs are cross-disability while others are disability and age specific.

3. Area programs report to local boards not to the Division of MH/DD/SAS.
4. Division of MH/DD/SAS sets minimal standards/policies, allocates funds, monitors compliance.

B. (OVERHEAD 20) Single Portal {NC Transition Manual, 80}

1. Single Portal is a procedure for review of all individuals with disabilities entering and exiting services. It is a legislatively mandated plan designed to ensure coordinated, appropriate, and timely services for persons with development disabilities served in day/night, and residential services.
2. Any person (any age) with a developmental disability needing services of 3 or more consecutive hours in length or day/night services must be referred through Single Portal.
3. Single Portal is comprised of an Interagency Committee and various subcommittees (e.g. CAP-MR/DD, Birth - 3, ADVP, School Level Transition Team, etc.)
4. (OVERHEAD 21) Single Portal is:
  - a. required by state legislation
  - b. an integration of service systems in a collaborative manner
  - c. designed to track needs and avoid duplication of services
  - d. not a "watch-dog" group
  - e. based on a person-centered philosophy
5. Upon referral, information is gathered by the Single Portal Chairperson and a person-centered plan is developed. The plan is presented to the Interagency Service Review Committee (Single Portal Committee).
6. (OVERHEAD 22) Several outcomes can result from a Single Portal referral:
  - a. referral to another public agency
  - b. referral to a contract agency of Mental Health
  - c. referral to a private agency (not under contract with Mental Health)
  - d. no appropriate service or resources exist and individual is placed on waiting list until services are available
  - e. a number of comparable services are available and individual must make a choice
  - f. Individual is determined to be eligible for the most appropriate service option, but stays on the waiting list for a better one

C. (OVERHEAD 23) Mental Health Services

1. The Community Alternatives Program for Persons with Mental Retardation/Developmental Disabilities (CAP-MR/DD) {NC Transition Manual, 82-83}
  - a. A special medicaid program that was started in 1983 to serve persons with MR/DD who would otherwise require care in an intermediate care facility for the mentally retarded (ICF-MR - discussed later).
  - b. Allows individuals the opportunity to be served in the community instead of residing in an institutional setting.
  - c. All 40 area programs administer CAP-MR/DD. Local programs are responsible for operation at the local level.
  - d. CAP-MR/DD is a **funding source** for services. The funding is 67% federal, 5% from local DSS and the rest is from the state.
  - e. CAP-MR/DD operates under a Medicaid home and community-based services waiver granted by the Health Care Financing Administration (HCFA). HCFA approves the services, the number of individuals that may participate, and other aspects of the program.
  - f. Participants must be at-risk for institutionalization.
  - g. The medicaid cost for community care must be cost-effective in comparison to the cost of ICF-MR/DD care.
  - h. The CAP-MR/DD Services Branch in the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services administers CAP-MR/DD.
  - i. The Division of Medical Assistance (as the state medicaid agency) provides oversight in relation to medicaid and waiver issues.
  - j. (OVERHEAD 24) Eligibility:
    1. All ages (in North Carolina the youngest client is 8 months and the oldest is 83 years old).
    2. Must be eligible for ICF-MR level of care.
    3. Must be at high risk for institutionalization.
    4. Must meet appropriate medicaid eligibility criteria (the income and resources of parent(s) or a spouse being considered similar to the way they are considered when a person is in an ICF-MR/DD facility). Deductibles are met monthly instead of every 6 months, resulting in some Medicaid coverage each month.
    5. Must have a need for CAP-MR/DD services
    6. Consumer and family must have a desire for CAP-MR/DD services.

7. (OVERHEAD 25) The resources must be available to meet the individuals needs in the community.
8. The individual must be able to be maintained safely in the community within the current monthly CAP-MR/DD cost limit (\$5672.00 per month)
9. Must have a MR diagnosis or DD prior to age 22.
10. Must have significant limitations in 3 out of 7 areas: Self-help, Learning, Expressive Language, Independent Living, Self-direction, Mobility.

k. CAP-MR/DD Services:

Based on an assessment of the individual's needs, the following CAP services may be considered. Each individual has a case manager (employee of local mental health) who arranges, coordinates, and monitors the services as well as other aspects of the individual's community care. The local Mental Health agency contracts with private providers for services:

1. Adult Day Health Care and Adult Day Care
2. Augmentative Communication Devices (\$10,000 limit)
3. Waiver supplies and equipment (adaptive positioning devices, mobility aids, aids for daily living from approved list and nutritional supplements given orally)
4. Crisis stabilization
5. Supported Living Services
6. Environmental Accessibility Adaptations from approved list
7. Vehicle Adaptations
8. In-Home Aide Services - Level I
9. MR Personal Care
10. Personal Emergency Response System
11. Personal Habilitation Services (Community Inclusion, Developmental Day Care, Family Training, Prevocational Services, Supported Employment). Almost 2/3 of CAP funds are spent in this area.
12. Respite Care (Community and Institutional)
13. Supported employment
14. Also eligible for medicaid services: Durable medical equipment (DME), home health aide, medical supplies, nursing (RN and LPN), OT, PT,



Speech, prescriptions, doctor's visits, dental/vision services. Limits on doctor's visits and prescriptions are waived allowing unlimited numbers.

Note: CAP-MR/DD services can not be used in place of funds which IDEA is responsible for covering. In order for a student to receive CAP-MR/DD services during normal school hours the student must be on homebound or have an adjusted school day.

Note: Many Thomas S. clients are now being served through CAP-MR/DD funds.

2. (OVERHEAD 26) Client Behavior Intervention (CBI) {NC Transition Manual, 85}
  - a. Used with adults and children (ages 6 and above) for up to 8 hours of service a day.
  - b. Across disabilities but must have an Axis I (MI) diagnosis if MR. Refer to the DSM-4 manual for a complete listing of Axis I diagnosis. Deficits must be related to mental illness or at-risk for intensifying disability or ability to live in the community. Note: ADHD does qualify.
  - c. Similar to High Risk Intervention - Periodic
  - d. Paraprofessional level staff -- will be primary service used in school if child is over six.
  - e. Can provide a wide range of habilitative services both at school, at home and in the community. Examples of services include one-on-one worker, behavioral intervention, counseling, habilitation training.
  
3. High Risk Intervention - Periodic {NC Transition Manual, 85-86}
  - a. Can be used for individuals up to age 21.
  - b. Must be at-risk for developing or intensifying a problem (e.g. developmental disability, parent who is developmentally disabled, parent who is a drug/alcohol abuser, etc.) and have a covered MH diagnosis.
  - c. Children under the age of 6 can have paraprofessional level care but over the age of 6 requires professional level care.
  - d. Schools utilize mostly for extra staff to assist with behavioral issues.

- e. Services can be delivered in the school, at home or in the community. Services can include behavioral intervention, counseling, medications, etc.
  - f. Most developmental day centers use HRI.
4. Case Management Services {NC Transition Manual, 84-85}
- a. A support service through which planning and coordination of services are carried out in coordination with and on behalf of the individual.
  - b. Designed to integrate multiple services needed or being received by a client through the area program or other agencies.
  - c. Assists the individual and his family in meeting the total needs by establishing referral to evaluation, education, vocational, residential, health, financial, social and other needed services.
  - d. Case managers are assigned to all individuals who have open cases with Mental Health and before the delivery of any services.
5. (GO TO OVERHEAD 27) Residential Options {NC Transition Manual, 86}

Case managers can assist individuals in obtaining a wide variety of residential options:

- a. Apartment Living
  - 1. Provides varying degrees of supervision for individuals with DD who are preparing for independent living.
  - 2. Counseling and technical assistance are provided as needed.
  - 3. Service model may include single resident or co-resident apartments and apartment clusters.
- b. Boarding House
  - 1. Provides an alternative living environment for persons with DD who are not ready for independent living.
  - 2. Training may be provided in the areas of health and safety, medication administration, use of community services, management of personal

funds, acquisition and refinement of self-help skills, leisure activities and personalized counseling services.

3. Less restrictive than group homes but more restrictive than apartment living.

c. Alternative Family Living

1. Persons with DD live with service providers and receive "family style" supervision and monitoring of daily activities.
2. Service providers are supported by ongoing consultation and training from the professional staff of the Area program or contract agency.
3. Habilitation plans are in place.
4. Children served remain in the custody of parents.

d. Group Homes for Adult with Developmental Disabilities (DDA Group Homes)

1. Provide a normalized home environment which incorporates developmental training and habilitative programming.
2. May be licensed for 2 - 9 adults.

e. Specialized Community Residential Centers

1. Provides care, treatment and developmental training for individuals who are MR or MI up to age 21.
2. Through integration of medical services and close supervision, it is designed to assist individuals in attaining their highest level of independent living skills while receiving physical care.

f. Intermediate Care Facilities for the Mentally Retarded (ICF-MR)

1. Certified as having met federal requirements for 24 hour personal care, habilitation, developmental and support services to persons with MR or DD who may have intermittent recurring needs for nursing services but who have been certified by a physician as active treatment (e.g. an aggressive effort to

fulfill each resident's functional capacity) in order to be eligible for medicaid support.

g. Regional Mental Retardation Centers

1. Five regional mental retardation centers operated by the Division of Mental Health (state level).  
Examples: Western Carolina, Caswell, O'Berry.
2. Must be 16 years of age or older with severe or profound mental retardation.

6. (RETURN TO OVERHEAD 26) Respite

- a. Provides periodic relief for a family on a temporary basis.
- b. Can be provided overnight or for periods less than 24 hours on a day or evening basis.
- c. The regional mental retardation centers offer respite upon referral by area programs.
- d. Types of Respite Services:
  1. Out-Of-Home Care: provided at a designated facility which has the potential for overnight care. Center may also provide respite services during the evening or for a few hours.
  2. In-Home Care (either private home or companion): is provided to individuals on an hourly or overnight basis. A contract between the respite provider and the Area program is developed. Private citizens serve individuals in their home. Companion respite is a support service in which a trained respite provider is scheduled to care for the individual in a variety of settings, including the client's home or other location subject to licensure.

7. Assistance with guardianship
8. Transportation: usually arranged by case managers through local transit authority.
9. Emergency commitments (crisis intervention)
10. Counseling (individual, group, family)
11. Medications/monitoring
12. Vocational services
13. Advocacy

Note: It is helpful to investigate the specific services offered by your local Mental Health Authority and refer to these in class.

VII. (OVERHEAD 28) **Community Colleges** {NC Transition Manual, 91}

A. The mission of the Community College system is to provide:

1. education and training for the workforce
2. support for economic development
3. services to communities and individuals

B. Basic facts concerning the North Carolina Community College System

1. Each year, one out of every six adults enrolls at a community college.
2. Every North Carolinian is within 30 miles of a community college or satellite center.
3. The North Carolina Community College system is the primary agency for the delivery of job training, literacy, and adult education.
4. The average community college student is 30 years old and more than 2/3 of the students work while attending school.

C. Services

1. Compensatory Education

- a. A free, community college program designed specifically for adults (18 years and older) with mental retardation. Cooperative program between agencies.
- b. Result of a lawsuit initiated by the Arc of North Carolina (1983). The law suit was settled through the agreement that the community college system would provide compensatory education.
- c. Focus is on academic skills needed by adults with mental retardation to function independently as possible in the adult world.
- d. Goals. Students with mental retardation will:
  1. become more independent and self-directed.
  2. become more familiar with basic occupational skills.
  3. acquire skills to meet and manage community, social, work, and personal adult relationships.

2. General Education Degree (GED) Program {NC Transition Manual, 90} - a program of instruction designed to prepare adult students to pass the GED tests that lead to a high school diploma equivalency.
  5. Adult High School Diploma (AHSD) - a program of instruction offered cooperatively with local public school systems to help students earn an adult high school diploma. The community colleges confer one out of every five of the state's high school diploma.
3. Career Counseling
4. Vocational and technical courses (students can take courses while still in high school for credit - 2+2 program. Note connection to Tech-Prep.
5. Literacy Labs
6. Study skills classes taught at local high schools
7. Placement testing
8. Special modifications for students with disabilities (refer back to Section 504 and ADA)
9. Adult Basic Education (ABE) - a program of basic skills for adults 16 years of age or older who function at less than a high school level.
10. Link in drop-out prevention programs (work with high schools to try and get drop-outs to enroll in GED programs)
11. Teen Pregnancy programs

Note: It is helpful to become familiar with the specific services offered by the community college in your area and refer to these in class.

### VIII. Department of Social Services

- A. (OVERHEAD 29) Workfirst Program of North Carolina {NC Transition Manual, 88-89}
  1. The Workfirst Program is aimed at assisting persons on welfare in getting off governmental assistance and becoming gainfully employed.
  2. Program Components:
    - a. Children do not have to be on welfare to be eligible for medicaid coverage (single mothers are often worried if they go to work that their children will lose medicaid).
    - b. Most parents who leave welfare for work can receive medicaid for up to one year -- children too. This is called Transitional Medicaid.

- c. Most parents who leave welfare can receive child care expenses for at least one year. After the first year, assistance can continue to be provided if there is a need and if there is available resources.
- d. Low income families can qualify for food stamps while working fulltime.
- e. Low income working families can get more take home pay in their paycheck through Earned Income Tax Credit (EITC). Families can get part of the extra EITC money in advance with each paycheck and the rest when they file their income tax return (must file a W-5 form with employer which can be obtained from case manager) or they can get all the extra EITC money when they file their tax return. Example of EITC benefit: In 1994, a family (with two children) earning \$10,000 a year can qualify to get \$2,528 in extra take home pay. The family could get the \$2,528 when they file their taxes or they could get \$102.00 per month and the remaining \$1,304 when they file their taxes. EITC money is not counted as income for medicaid, AFDC, food stamps, SSI, or housing assistance.

B. Services:

- 1. Assistance with guardianship
- 2. Assistance with residential placement in domiciliary care homes.
- 3. Case management (if a student is receiving welfare, which may be the case if the student is an unwed mother, their case manager should attend the transition planning meetings)
- 4. Family Preservation services

IX. **Social Security Administration** {NC Transition Manual, 100-101 and Appendix U}

A. (OVERHEAD 30) Supplemental Security Income (SSI)

- 1. Income support program run by social security administration. Monthly benefits can be paid to eligible individuals (regardless of age) whose "disability or blindness is as severe as one that would keep an adult from working and is expected to last at least 12 months."

B. (OVERHEAD 31) Social Security Disability Insurance (SSDI)

1. A government insurance fund that can be paid to a person with a disability who has worked and paid into the social security system or a person without a disability whose parents or spouse paid into the social security system (after their death). May be supplemented by SSI if less than SSI amount.

C. Social Security Work Incentives

1. The Employment Opportunities for Disabled Americans Act (July 1, 1987)
  - a. Allows people to continue to receive SSI after their earned income is at the amount designated at the "Substantial Gainful Activity Level" (SGA). The SGA may change from year to year (1999: \$700.00 per month). SGA means work activity that involves significant physical or mental effort and is done for pay or profit. Intended to simplify requirements for recipients. The act allows for the fact that income can be expected to go up and down during the strive for independence.
  - b. When an individual begins to earn money, the SSA follows this procedure:
    1. Disregards the first \$65.00 per month in earned income.
    2. Provides for a \$20.00 per month general exclusion.
    3. Income over \$85.00 per month is divided by two.
    4. **So the SSI recipient loses one dollar for every dollar earned.**
    5. Sample SSI Benefit Computation for a person receiving \$407.00 per month in SSI and earning \$585.00.

SSA disregards first \$65.00 per month  
( $\$585.00 - \$65.00 = \$520.00$ )

Then there is a \$20.00 per month general  
( $\$520.00 - \$20.00 = \$500.00$ )



Then the balance is divided by two.  
(\$500.00 divided by 2 = \$250.00)

So the individual's SSI benefit would be  
\$157.00 per month. (\$407.00 - \$250.00 =  
\$157.00)

The recipient would thus get \$742.00 per  
month in total income (\$585.00 (earnings)  
+ \$157.00 (SSI) = \$742.00)

- c. The act also allows most individuals to keep  
medicaid after they stop receiving SSI. Medical  
conditions must be reviewed within 12 months of  
entering status 1619b. Must apply prior to SSI  
checks stopping.
2. (OVERHEAD 32) Impairment-Related Work Expenses  
(IRWE) {NC Transition Manual, 100}
- a. IRWEs are the costs for services/materials a  
person needs to be able to work. Services/materials  
can be deducted only if the person pays for the  
costs himself and receives no reimbursement.
  - b. Examples of IRWEs include: cost of wheelchair,  
pacemaker, braces, artificial limbs, job coach, one-  
handed typewriters, electronic visual aids, braille  
devices, attendance care (to and from work).
  - c. Services/materials must be needed due the  
disability. Can not be the costs a person without a  
disability would have if he or she had the same  
job.
  - d. These costs are deducted from individual  
Substantial Gainful Activity level when calculating  
how much money that person should receive in  
his/her check. An individual can get %50 of an  
impairment related expenses in SSI benefits.
  - e. No prior approval is needed from SSA for an  
IRWE. An individual simply presents the receipts  
for payment to SSA and the deduction is granted.  
No limitation as to how long use of the deduction  
may be continued.
  - f. Sample IRWE Computation for an individual  
earning \$585.00 from work and receiving \$407 in  
SSS benefits:

1. The standard deductions of \$65.00 and \$20.00 still apply ( $\$585.00 - \$85.00 = \$500.00$ ).
2. The consumer has a \$150.00 IRWE deduction for job coaching ( $\$500.00 - \$150.00 = \$350.00$ ).
3. The balance is divided by two ( $\$360/2 = \$175.00$ ).
4. The \$175.00 is deducted from \$407.00 and the individual receives \$232 in SSI benefits ( $\$407 - \$175.00 = \$232.00$ ).
5. The individual's income is \$667.00 ( $\$585.00 + \$232.00 = \$817.00 - \$150.00 = \$667.00$ ).
6. Total actual loss to the individual is \$75.00 ( $\$742 - \$667.00 = \$75.00$ ).

g. May be used for SSI or SSDI

3. (OVERHEAD 33) Plan For Achieving Self-Support (PASS) {NC Transition Manual, 101 and Appendix V}. The form in the book is no longer valid. The new form is Form SSA-545-BK effective 2-99 and can be obtained from the local Social Security Office.
  - a. Helps individuals accumulate resources in order to pursue a specific work goal (e.g. education, starting a business, buying work-related equipment).
  - b. Examples of PASS services and supports include: transportation to job site, vehicle purchase, supported employment, work tools, work equipment, work clothes, adaptive equipment, personal assistant services.
  - c. A PASS is a work incentive program that enables a person with a disability to receive earned and unearned income and to set some or all funds aside for up to 48 months. Income and resources set aside are excluded from SSI income and resource tests. SSI payments can not be set aside in a PASS. Individual must have another type of income to establish a PASS.
  - d. Must be approved by SSA in advance.

- e. (OVERHEAD 34) Each PASS must include a realistic work goal, a date for achieving the goal, a clear savings and spending plan and a method for keeping track of the funds set aside. There must be specific savings plan or disbursements listed that are related to attainment of the occupational objective.
- f. Helpful to initiate prior to transitional or supported employment - but can be done after employment.
- g. A PASS is time-limited. The expectation is that by the completion of the PASS, the individual will have accomplished the goal of being more independent.
- h. Usually approved for up to 18 months, then a second 18 month extension can be granted. Finally a 12 month extension can be granted. Then if the goal was not obtained, a new goal could be established.
- i. The plan must be followed as outlined and revisions must be negotiated when appropriate.
- j. Sample PASS computation for an individual earning \$585.00 for work and \$407.00 in SSI benefits):

1. The standard deductions of \$65.00 and \$20.00 apply ( $\$585.00 - \$85.00 = \$500.00$ ).
2. This amount is divided by two ( $\$500.00/2 = \$250.00$ ).
3. The PASS deduction is then subtracted ( $\$259.00 - \$150.00 = \$100.00$ ).
4. So \$100.00 is deducted from \$407.00 (amount of SSI) and the individual receives \$307.00 in SSI benefits ( $\$407.00 - \$100.00 = \$307.00$ ).
5. The individual's income is \$742.00 ( $\$585.00 + \$307.00 = \$892.00 - \$150.00 = \$742.00$ ).
6. Total actual cost to the individual is zero ( $\$742.00 = \$742.00 = 0$ ).

Note: Some of the problems that have been encountered using PASSES include: 1) approval process takes too long, 2) paperwork too difficult/excessive 3) approval rates too low, 4)

consumer needs don't match allowable expenses,  
5) allowable sheltered income too low to make  
worthwhile.

k. Can be used only for SSI.

4. (OVERHEAD 35) Trial Work Period {NC Transition Manual, 102}

- a. The trial work period allows each individual to test their ability to work without fear of losing social security benefits.
- b. The trial period is 9 months which need not be consecutive. During or after the time, if the individual demonstrates the ability to earn above the SGA limit, the individual may not be considered disabled. Monetary benefits will be discontinued after a 3 month grace period.

5. Extended Period of Eligibility {NC Transition Manual, 102}

- a. If earnings fall below SGA --- payments can be reinstated during a 39 month period. No need to reapply. Benefits reinstated without waiting period.

Note: In 1999 the SSA created the Office of Employment Support Programs in an effort to partnership with other agencies (public and private) in order to remove barriers to employment encountered by disability beneficiaries.

Note: The local Social Security office has numerous pamphlets and brochures that further explain the benefits and work incentives.

6. Ticket to Work and Work Incentives Improvement Act of 1999

- a. The law focuses on the following purposes:
  - 1. increasing beneficiary choice in obtaining rehabilitation and vocational services
  - 2. removing barriers that require

people with disabilities to choose between health care coverage and work

3.

assuring that more Americans with disabilities have the opportunity to participate in the workforce and lessen their dependence on public benefits

b. Establishment of the Ticket to Work and Self-Sufficiency Program

1.

Will be phased in nationally over a three-year period beginning 1-1-2001.

2.

Social Security and Supplemental Security Income disability beneficiaries will receive a "ticket" which may be used to obtain VR, or other employment support services from an approved vendor list.

3.

The ticket program is voluntary.

c. Expanded Availability of Health Care Services

1.

Gives states the option of providing Medicaid coverage to more people between 16 and 64 with disabilities who work.

2.

States will have the option of allowing individuals with incomes above 250% of the federal poverty level to buy Medicaid.

3.

Extends Medicare coverage for people with disabilities who return to work.

d. Work Incentives Outreach Program

1.

Social Security is directed to establish a community-based work incentives planning and assistance program for the purpose of disseminating accurate

information related to work incentives.  
Social Security will set up a corps of work  
incentive specialists within Social Security.

e. Expedited

Reinstatement of Benefits

1.

When a person's Social Security or Supplemental Security Income disability benefits have ended because of earnings from work, he or she can request reinstatement of benefits.

2.

Beneficiaries must be unable to work because of their medical conditions.

3.

The person must file the request for reinstatement with Social Security within 60 months from the month of their termination.

4.

While Social Security is making a new determination, beneficiaries may receive up to six months of provisional benefits including Medicare and Medicaid if appropriate. If Social Security decides that the medical condition no longer prevents the individual from working, the provisional benefits paid would not be considered an overpayment.

X. (OVERHEAD 36) **Employment Security Commission**

A. While the agency may not be represented on the school level transition team it must be involved at least at the Community Level. Students also need to be trained in the services offered by this agency.

B. Services

1. Information about the labor market. Job listing. Computerized service. Arranges interviews with local companies.
2. Information about the skills needed for jobs.

3. Assessment to determine vocational aptitudes and interests.
4. Youth programs to aid transition.
5. Career guidance and counseling.
6. State Training Inventory which identifies training programs throughout the state.
7. Occupational employment statistics.
8. Multiple resources available: Dictionary of Occupational Titles, Occupational Outlook Handbook, etc.

XI. **Workforce Investment Act (WIA) Services** {NC Transition Manual, 92}

A. JTPA started out as CETA: The Comprehensive Employment and Training Act of 1973 (P.L. 93-203)

1. Included Job Corps after 1978
2. Replaced by the Job Training Partnership Act of 1982
  5. JTPA incorporated into the Workforce Investment Act of 1998 (as of July 1, 2000, all states must have in place all components of the Workforce Investment Act of 1998)

B. Overview of the Workforce Investment Act of 1998

1. (OVERHEAD 37) Purpose: *"To prepare youth and adults facing serious barriers to employment for participation in the labor force by providing job training and other services that will result in increased employment and earnings, increased educational and occupational skills, and decreased welfare dependency, thereby improving the quality of the workforce and enhancing the productivity and competitiveness of the nation."* (Public Law 97-300 as amended on 9-7-92; Title I, Section 2)
2. (OVERHEAD 38) Service Delivery Areas (SDAs) are appointed by the governor to receive federal funds (500,000+ population - may be several counties together. Only 2 in NC this large, all others are 200,000 except for 2 in Western North Carolina). Note: Public Law 105-220 (8-7-98) replaced Private Industry Councils (PICs) with Workforce Development Boards.
3. Workforce Development Boards are appointed by local elected officials to plan job training and employment service programs in the service delivery areas.

a. Membership

1. Representatives from private sector (51%). Emphasizes private sector involvement.
2. Educational Agencies
3. Organized Labor
4. Community-Based Organizations
5. VR agencies
6. Public Assistance Agencies
7. Economic Development Agencies
8. Public Employment Service
9. Veteran agencies

b. Functions of Workforce Development Board

1. Set policy for Service Delivery Areas
2. Guidance to Service Delivery Areas
3. Oversight of the Service Delivery Areas and programs
4. Determine local procedures
5. Select grant recipients
6. Determine procedures for development of and approval of job training plans
7. Develop monitoring plan

6. Includes 6 separate titles including ones for vocational education, adult education, and workforce development which replaces the Carl Perkins Act, the Adult Basic Education Act, and JTPA. It maintains separate funding streams for each. It also contains amendments to Wagner-Peyser and the Vocational Rehabilitation Act.

7. Establishes the one-stop system as the access point for employment-related service (referred to as JobLink Career Centers in North Carolina). Designated one-stop partners are programs that must provide core services through the one-stop and include programs authorized under: the Wagner-Peyser Act, the Adult Education and Literacy Act, the Vocational Rehabilitation Act, the Welfare-to-Work grants, Title V of the Older Americans Act, Postsecondary Vocational Education under the Perkins Act, Trade Adjustment Assistance, Veterans Employment Services under Chapter 41 of Title 38, Unemployment Compensation Laws, Community Service Block Grants, employment and



training activities carried out under the Department of Housing and Urban Development and additional programs also may be partners in the one-stop center with the approval of the local board and local elected officials. In 1999 there were 36 centers in N.C.

8. Establishes Youth Councils.

The youth Council provides expertise, establishes linkages and broadens training focus. The Youth Council makes recommendations about how the funds for youth services will be spent within the SDA.

9. Provides for operating agreements between partners, one-stop partners, one-stop operators, and local partnership to address issues such as oversight, referral, and operating costs (Comparison of key feature)

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C. General Goals for Workforce Investment Act

1. Job Placement
2. Employment Retention
3. Increased Earnings
4. Reduction in Number of Welfare Recipients
5. Educational Achievement and Retention
6. Employability Enhancement

D. Key Premises of Workforce Investment Act

1. Partnership
  - a. Private Sector
  - b. Government
  - c. Education
2. Shift to Local Control
  - a. Oversight by Workforce Investment Board in coordination with local elected officials
3. Performance Driven
  - a. Establish performance standards
4. Focus on Training
  - a. Increase educational and occupational skill training
5. Targeted Services {NC Transition Manual, 93}
  - a. Targeted Groups

1. (OVERHEAD 39) Adult I(Ages 22 and over and economically disadvantaged)
  - basic skills deficient
  - school drop-out
  - recipient of cash welfare
  - offender
  - individual with a disability
  - homeless

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2. food stamp recipient  
(OVERHEAD 40) Youth (Ages 14-21 and economically disadvantaged). Note: 30% of the funds must be spent on Out-of-School youth. Up to 5% of the youth served do not have to meet the economic eligibility requirements if they meet other criterion.

drop-out

basic skill deficient  
(computes or solves problems, reads, writes or speaks English at or below 8.9 or is unable to compute or solve problems, reads, writes, or speak English at a level necessary to function on the job, at home or in society.

pregnant or parenting

is an individual  
(including a youth with a disability) who requires additional assistance to complete an educational program or to secure and hold employment (if the child is disabled he or she can use their "own" income instead of the families. Can not use free lunch to meet economically disadvantaged requirement.)

homeless or runaway

offender

E. (OVERHEAD 41) Examples of Workforce Investment Act Services {NC Transition Manual, 94-95}

1. JOBS program: A full-time WIA worker is assigned to the Department of Social Services to work with individuals in order to speed the transition from welfare assistance to unsubsidized living through the programs offered by WIA. Job readiness classes are provided to the participants

for assistance with career exploration, job seeking, and retention skills.

2. **On-The-Job Training:** A contractual situation between WIA and local employees whereby the employer is paid up to 1/2 of the participant's hourly wage for training. The length of training can be for up to 6 months but may vary based on the skill level of the training occupation. After the training period is completed, the participants are placed in unsubsidized employment with that employer.
3. **Service Corps:** Offers a combination of much needed service to local non-profit and government organizations in a catchment area. Goal is to provide education, work experience, and job placement activities for young adults 18 - 23 years of age.
4. **Summer Employment Opportunities:** provides direct linkages to academic and occupational learning. This is not a stand-alone program. All youth in summer employment are provided with 12 month follow-up services.

#### 5. Work

**Experience:** planned, structured learning experiences that take place in a workplace for a limited period of time. Work experiences may be paid or unpaid. Designed to enable youth to gain exposure to the world of work and help students acquire the skills/habits needed for employment and employment advancement. Work experiences can include the following things:

- f. Instruction in employability skills or generic workplace skills such as SCANS
- g. Exposure to various aspects of an industry
- h. Progressively more complex tasks
- i. The integration of basic academic skills into the work activities
- j. Supported work, work adjustment, and other transitional activities

- k. Entrepreneurship
- l. Other elements designed to achieve the goals of work experience

m. In most cases, on-the-job training is not an appropriate work experience activity for youth participants under the age of 18.

- 6. Youth Internship: Designed to assist youth 16-21 with transition from school to work (into potential career jobs). Career development, planned programs of OJT and work-based learning combined with school-based learning. Youth enter paid internships at entry level wages and continue formal education through completion of high school subjects at the community college.

Note: The Workforce Investment Act of 1998 lists youth services as including: tutoring, study skills training and instruction leading to completion of secondary school (including drop-out prevention), alternative school services, adult mentoring, paid and unpaid work experiences (internships and job shadowing), occupational skills training, leadership development opportunities, supportive services, follow-up services for not less than 12 months as appropriate, and comprehensive guidance and counseling.

## XII. Four Year Universities and Colleges

- A. (OVERHEAD 42) Types of Programs To Prepare Students with Disabilities to Enter College {NC Transition Manual, 148-149}. Note: Need to contact the Disability Services Office at a college or university to determine the specific programs that are available. (HEATH Resource Center (American Council on Education) (1991). Learning disabled adults in post-secondary education. Washington, DC: Author.

- 1. The Prep Program

- a. May be pre-college year, semester or summer and is usually offered on a college campus (but may be in a secondary program).

- b. Emphasis is on diagnosing strengths and individual learning styles.
- c. Study skills and organization skills are taught.
- d. Usually a large component of individualized counseling leading to a choice of and application to a college or university.
- e. Generally very small with a class of 3 - 8.

## 2. LD Program In College and University

- a. The goal of the LD program is to teach students with learning disabilities how to manage their disability and provide the support needed for the student to ultimately function in the regular campus program, earn a degree and handle the situations.
- b. May be separate admission to the LD program (usually a fee).
- c. Emphasis is placed on individual counseling, academic advising, and identifying personal and educational strengths.
- d. An LD specialist usually coordinates the program.
- e. Diagnostic evaluation may be a part of the program.
- d. Students usually take some regular classes in the college -- for college credit.
- e. Frequently one or two non-credit courses specifically designed to enhance skills are part of the program.
- f. Social skills are often addressed in the form of peer counseling and structured opportunities for social interaction.

## 3. Regular Campus Program

- a. Many campuses admit students with learning disabilities under their regular admissions process which may be either by "open enrollment" or a selective procedures.
- b. (OVERHEAD 43) Nearly all campuses have some type of support services and modifications can be arranged. These services vary from college to college.

1. Instruction in reading, writing, study skills, math, and other subjects necessary for success beyond high school.
2. Personal counseling.
3. Academic advice and assistance in course selection.
4. Tutorial services and counseling.
5. Exposure to cultural events and academic programs not usually available to disadvantaged students.
6. Activities designed to acquaint students with range of career options available to them.
7. Activities designed to assist students in securing financial aid for enrollment in graduate and professional programs.
8. Mentoring programs involving faculty or upper classman.
9. Activities designed to assist students currently enrolled in 2-year programs in securing admission and financial assistance for enrollment in a four-year program.
10. Assistance with test-taking (e.g. extended time, adaptations to format, etc.)
11. Note taking services

B. Section 504 of the Rehabilitation Act

1. (OVERHEAD 44) Under Section 504 universities and colleges can not:
  - a. limit the number of students with disabilities admitted
  - b. make preadmission inquiries as to whether or not an applicant is disabled
  - c. use admission tests or criteria that inaccurately measure the academic qualifications of students with disabilities because special provisions were not made from them
  - d. exclude a qualified student with a disability from any course of study
  - e. limit eligibility to a student with a disability for financial assistance or otherwise discriminate in administering scholarships, fellowships,

- internships, or assistantships on the basis of handicap
- f. counsel a student with a disability toward a more restrictive career
- g. measure student achievement using modes that adversely discriminate against a student with a disability
- h. establish rules and policies that may adversely affect students with disabilities

C. Getting Students With Learning Disabilities Ready For College

1. Make sure psychological testing is up-to-date.
2. Obtain all special testing records prior to graduation.
3. Contact Vocational Rehabilitation.
4. Vocational assessment to clarify future and present goals.
5. Make sure the student has adequate study skills.
6. Get a clear picture from high school, how much assistance the student has been getting (to determine the minimal or extensive LD services that will be needed).
7. Increase independent living skills.
8. Encourage part-time work/volunteer to increase socialization skills and understanding of work expectations.
  9. Make sure the student understands own disability. Should be able to identify strengths and weaknesses and state needed accommodations.
10. Help students understand how disability is connected to social experiences with peers, family members, co-workers and employers.
11. Teach self-advocacy skills.
12. Learn about legal rights. Responsibility is the individual's to initiate the provision of services and accommodations.
13. Get information on special examination arrangements for SAT/ACT (e.g. untimed, readers, cassettes, etc.).
14. Get two copies of college applications.
15. Contact Disabled Student Services Office at colleges before applying to check on available services.
16. Visit colleges.
17. Consider starting college in the summer when things are less hectic.
18. Take care of all medical and health problems prior to enrolling in college.
19. Encourage student membership in a disability organization.



20. Make sure it is the student's choice to attend college.
- D. Choosing a College or University {NC Transition Manual, 149-151}
1. What are the requirements for admission?
  2. How many students with disabilities are on campus? What year are they in? Are they full-time, part-time, residents, commuters, traditional age, or older? Men? Women? Can they be contacted?
  3. What are the goals and objectives of the program?
  4. What services are provided? Is there a charge for them? How does one obtain such services?
  5. What specialized training in disabilities do the professors have?
  6. Is tutoring and/or counseling provided on a one-on-one basis or in a group? If in a group, how large is it? How frequently and intensively is it available.
  7. What supervision is provided for non-certified instructors or tutors?
  8. How is the duration of services determined? Is it usually one semester? One year? Two or longer?
  9. Who will be my academic advisor and what training will this individual have in disabilities?
  10. Do students with disabilities take regular college courses? For credit?
  11. Any courses unavailable to students with disabilities?
  12. What modifications have faculty or administrators been

- willing to make for students with disabilities?
13. Are there courses required of students with disabilities? If so, do they carry college credit and does the credit count toward graduation?
  14. How many students with disabilities have graduated from this college? In what fields? What have they done since graduation? (Zaccarine, D. & Stewart, A. (1991). Questions to ask when visiting a college. Cullowhee, NC: Western Carolina University). (Higher Education Consortium on Learning Disabilities, 1991). (Barr, V.M., Hartman, R.C. & Spillone, S.A. (1995). Getting ready for college: High school students with learning disabilities. Washington, DC: HEATH Resource Center.

#### Suggested Videos:

1. In Their Own Words (Project Extra) General College-University of Minnesota, 140 Appleby Hall, 128 Pleasant Street, SE, Minneapolis, MN 55455 (612) 625-5366. This video presents positive role models of students with learning disabilities who have been successful in post-secondary education. Comes with a study guide filled with suggested activities and resources. (25 minutes)
2. College: A Viable Option (Transition Project, University of Utah) Interface Video Systems, 1233 20th Street NW, Washington, DC 20036 (202) 861-0500. Discusses post-secondary education as an future option for high school students with learning disabilities. Also gives a brief overview of learning disabilities. (20 minutes)
3. Promises To Keep (from the Graduating from Independence Notebook). Department of Health and Human Resources, SSA: Office of Disability, Room 545 Altmeyer Building, 6401 Security Blvd., Baltimore, MD 21235 (410) 965-5419. Presents a brief overview of the SSI work incentives. (15 minutes)
4. Business Sponsored Supported Employment (Trans-Center) Horizons, Inc. 108 Elden Street, Suite 10, Herndon, VA 22070 (703) 478-2700. Presents a brief overview of supported employment. (7 minutes)
5. Employability: Integrating People With DD into the Workplace Woolworth Corporation. Can order through the national Arc. Hosted by Ann Turnbull and James Earl Jones. Presents inspiring portrayals of several individuals who are moderately to severely handicapped working in competitive employment. Shows the positive role of supported employment. Also addresses transition planing and parental involvement. (30 minutes)

**Community-Based Training**

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**Community-Based Training**

A reality-based training program in which a student works and trains at selected community businesses and services. The desired outcomes are competitive employment and independent living skills.

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**CBT Is:**

- Conducted in the community with real equipment, materials, and tools
- On-going
- Relevant to student's post-school goals and included in the IEP/ITP
- Integrated
- Supervised
- An integral part of the school program

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**CBT Is Not:**

- A field trip
- Staff doing activity/work while students watch
- A one time event
- Segregated
- Unsupervised
- A program "extra"




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*"You don't have to be alone to be lonely, but that is when you feel it the most."*

-- Ziggy




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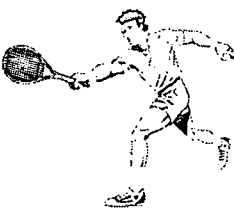
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**Barriers to Recreation/Leisure**

- Lack of transportation
- Physical limitations
- Limited activity skills
- Shortage of friends
- Limited funds
- Limited opportunities




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### Leisure Curriculum Areas



- Leisure Awareness
- Leisure Resources
- Leisure Communication Skills
- Making Decisions
- Leisure Planning
- Activity Skill Instruction

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### Types of CBVT



- "Other" Campus Jobs
- Job Shadowing
- Paid/Non-Paid Work Experiences
- Individual Job Placements
- Workforce Development Education Courses

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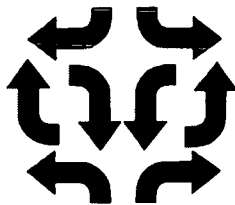
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### Critical Issues in CBT

- Locating CBT Sites
- Staffing and Grouping
- Transportation
- Liability
- Funding
- DOL Standards



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### Locating CBT Sites

- Use letters, telephone follow-up, drop-ins, and referrals.
- Use a brochure
- Discuss possible training areas
- Discuss supervision options
- Develop written agreements

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### Staffing and Grouping for CBT



- Transition teacher
- Team teaching
- Use of related services staff
- Heterogeneous grouping
- Staggered implementation

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### Transporting Students

- School Bus
- Activity Bus
- School Car
- Student/Parent Car
- Public Transportation
- Staff Car
- Walking



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**Liability Issues**

- Parental permission
- IEP/ITP goals and objectives
- School Board policy
- Staff training
- Insurance coverage (student and staff)
- Emergency releases/permissions
- Safety checks/OSHA

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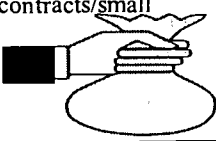
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**Funding CBVT**

- Redirect funds
- Fundraising
- PTO/School funds
- Funds from business contracts/small business




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**Environmental Analysis**

An environmental analysis can be used to determine resources available in the community or can be used to determine the characteristics of a specific work setting.




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### Task Analysis

A written breakdown or description of a particular task or job into each individual component, action, or step needed to complete that job or task.



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### Methods Analysis

Analyzes the manner in which a job is completed to determine the most efficient method for completing the job. Involves utilizing a variety of strategies to modify the tasks of a job to increase productivity.

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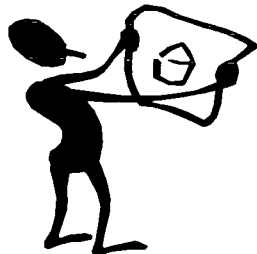
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### Fair Labor Standards Act establishes:

- Minimum wage
- Overtime pay
- Equal pay
- Recordkeeping
- Child labor laws



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### Vocational Components

#### Vocational Exploration

Exposes students for short periods of time to a variety of work settings to help them make decisions about future career directions. Students gain information by watching other people work, talking with employees, and actually trying out some work.

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### Vocational Components

#### Vocational Training

Places students in various employment settings for work experiences. The training is included in IEP and is supervised by school staff. Purpose is to enable the student to develop competencies and behavior needed for future employment.

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### Vocational Components

#### Vocational Assessment

Allows school staff to work with and observe students in work settings in order to determine appropriate training goals. Student rotates through various work settings corresponding to range of interests. Also called situational assessment.

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Dear Colleague Letter  
(Guidelines for CBVT)

1. Participants will be youth with physical and/or mental disabilities for whom competitive employment at or above minimum wage is not immediately obtainable and who, because of disability need intensive on-going support.

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2. Participation will be for vocational exploration, assessment, or training in a CBT work site under the general supervision of school personnel.

3. CBT placements will be clearly defined components of the IEP's developed and designed for the benefit of the student.

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4. Information contained in the IEP does not have to be made available, however documentation of student's enrollment in CBT program will be available to DOL and DOE. The student and parent/guardian of student must be fully informed of the IEP and CBT placement component and have indicated voluntary participation and that participation in such a component does not entitle student to wages.

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5. The activities of students at a CBT placement do not result in immediate advantage to the business. The DOL will look at several factors:

a. There has been no displacement of employees, vacant positions have not been filled, employees not relieved of assigned duties, and student not performing services that although not ordinarily performed by employees clearly are of benefit to business.

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b. Students under continued and direct supervision by representatives of school or employees of business.

c. Placements made according to requirements of student's IEP and not to meet labor needs of business.



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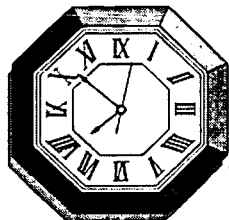
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d. The periods of time spent by the students at any one site or in any clearly distinguishable job classification are specifically limited by the IEP.



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6. While the existence of an employment relationship will not be determined exclusively on the basis of number of hours, as a general rule, each component will not exceed the following limitations during any one school year:

- Vocational exploration (5 hrs. per job)
- Vocational assessment (90 hrs. per job)
- Vocational training (120 hrs. per job)

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7. Students are not entitled to employment at the business at conclusion of IEP. However, once a student has become an employee, the student cannot be considered a trainee at that particular community-based placement unless in a clearly distinguishable occupation.

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### Volunteering

- A "true" volunteer position
- Student choice
- Others volunteering in similar positions
- Student understands pay is not a consideration
- Student is not being taken advantage of - they are treated the same as others

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### Child Labor Laws

- Designed to protect the educational opportunities of minors
- Prohibits employment of minors in jobs and under conditions detrimental to their health and well-being
- Hour restrictions on minors under 16
- Lists hazardous occupations for farm and nonfarm jobs

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### Work Experience and Career Exploration Programs (WECEP)

1. Must be obtained for the whole state. Usually administered by DOE with approval by DOL.
2. Only way those under 16 can work for pay during the school day.

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## Lecture 8: Business and Industry Involvement

### I. Introduction

Both Career Education and Workforce Development Education (JobReady) encourage involvement of business and industry. In this section, we will look at what industry is telling schools they need in employees, the current barriers to employment for individuals with disabilities and what the law says about hiring people with disabilities. Finally, we will discuss some strategies for helping students obtain employment.

One of the primary goals of transition is to obtain employment for persons with disabilities. As we have discussed before the statistics on employment for this population is bleak. Only 3 in 10 adults with disabilities are working versus 8 in 10 of adults with disabilities. However, when polled 7 out of 10 adults with disabilities want to work. The development of business partnerships with schools can enhance early employment of young adults with disabilities (1998 N.O.D./Harris Survey of Americans with Disabilities).

### II. Obstacles To Employment (or why do persons with disabilities not become employed?)

A. (OVERHEADS 2 and 3) What are some of the more common obstacles to employment for persons with disabilities? {NC Transition Manual, 199}

1. Economic and benefit disincentives (e.g. SSI check, medicaid)
2. Employer perceptions and attitudes
3. Family beliefs and concerns
4. Staff perceptions
5. Lack of interagency coordination
6. Transportation problems
7. Lack of supported employment options (especially the lack of enclaves and mobile work crews)
8. Lack of appropriate social, behavior, and vocational skills
9. Lack of transition services
10. Lack of follow-up after job placement
11. Labor market limitations
12. Personal motivation to work
13. Lack of family support

B. (OVERHEAD 4) Factors associated with failure to maintain competitive employment (Karan, O. & Knight, C.B. (1986). Developing support networks for individuals who fail in competitive employment. In F.

Rusch (Ed.) Competitive employment: Issues and strategies. (pp. 241-255) Baltimore, MD: Brookes Publishing Company.

These can be referred to as Failure Producing Behaviors:

1. Maladaptive behavior (e.g. non-compliance, off-task, bizarre, aggression, stereotypic, SIB)
2. Dependence on supervision
3. Inappropriate interactions
4. Excessive tardiness
5. Insufficient speed and inaccuracy
6. Inadequate attendance
7. Failure to communicate with supervisor
8. Unacceptable personal appearance

### III. Overcoming Obstacles To Employment

#### A. (OVERHEAD 5) Key Factors in Job Placement

1. Physical Mobility
2. Client Motivation
3. Family Support
4. Accessibility to Job
5. Social Behavior
6. Daily Living Skills

#### B. Job Matches

1. Successful employment may depend more on the match between people and their environments than on the personal characteristics of individuals (Berkson and Ramer, 1980)
2. The good job placement and maintenance is to maximize the fit or congruence. Congruence occurs when an individual's behavior is in harmony with the expectations of the environment. (Thuman, 1977)

(OVERHEAD 6) Discussion Point: The following questions can be used to help student think about how they have found jobs in the past and how well the job fit their needs and skills:

- What was your first job?
- How did you find this job?
- Why did you select this job?
- How long did you keep this job?
- Why did you leave the job?

#### IV. What Business and Industry is telling Education

The first thing that business and industry is telling us, is that the job market is changing:

A. (OVERHEAD 7) Job Skill Level Changes

1.	1950	Professional	20.0%
		Unskilled	60.0%
		Skilled	20.0%
2.	1991	Professional	20.0%
		Unskilled	35.0%
		Skilled	45.0%
3.	2000	Professional	20.0%
		Unskilled	15.0%
		Skilled	65.0%

Note: See The Occupational Outlook Handbook (US Department of Labor: Bureau of Labor Statistics) to discuss employment opportunities by occupational group, annual average job openings by occupational group for North Carolina (projected into the year 2000). This discussion should focus on the number of skilled jobs and areas that are suitable for persons with various disabilities.

B. (OVERHEAD 8) Service and Quality are key words for businesses in the 90's. (Just as The Ford Company states: Service and Quality are job one).

C. (OVERHEAD 9) Employers want workers who can solve problems, get along with others, be alert to safety, manage money, and anticipate problems.

D. (OVERHEAD 10) Factors Associated with Successful Employment (M.A. Chamberlain (1988). Employer's Rankings of Factors Judged Critical to Job Success for Individuals with Severe Disabilities, Career Development for Exceptional Individuals, 11, 141-147).

1. Getting along with others
2. Interest in job
3. Efficiency
4. Dependability



## 5. Adaptability

Discussion Point: What are some of the main similarities and differences between the school environment and the work environment?

### V. (OVERHEAD 11) **Business Contributions** {NC Transition Manual, 201-202}

Why is the engagement of employers in the development of vocational training programs for students with disabilities so important?

1. The Information Technology (IT) Industry projects a need for 1.6 million new workers by April 2001, and expects 850,000 of these vacancies to go unfilled (Information Technology Association of America, 1999).

2. 60% of the new jobs in the 21<sup>st</sup> century will require skills possessed by only 20% of the present workforce (Bureau of Labor Statistics, 2000).

3. In 1996, 19% of potential workers tested lacked the necessary skills in reading, writing, and math to perform the job for which they applied. By 1999, that percentage had risen to 38% (The Wall Street Journal, 1-31-00).

In addition to telling schools what skills are needed, business and industry can contribute in other areas:

- A. Additional resources/expertise
- B. Provide sites for work experiences
- C. Promote better understanding between businesses and education
- D. Identify trends in economy -- job market
- E. Provide contacts within business /industry
- F. Advocate for workers with disabilities
- G. Classroom speakers and resources
- H. Program consultation (e.g. labor laws, student evaluation, program evaluation, cost analysis, resource management)
- I. Conferences and workshops (**Brolin, D. (1995). Career education: A functional life skills approach**. New Jersey: Prentice

### VI. What You Need To Know When Contacting Employers

- A. The Law (ADA and Rehabilitation Act of 1973)
  - 1. What is the Americans With Disabilities Act? {NC Transition Manual, 209-211}

a. (OVERHEAD 12) Signed on 7-26-90 by President George Bush. A federal mandate which prohibits discrimination on the basis of disability in five areas:

1. Employment
2. Public accommodations
3. Transportation
4. Telecommunications
5. State/local government

b. The ADA is related to the Civil Rights Law of 1964, the Architectural Barriers Law of 1968 and the Rehabilitation Act of 1973 and the Rehabilitation Act Amendments of 1978.

c. ADA was fully enacted on July 26, 1994 (it was phased in based on the number of employers per business). Businesses with 15 - 24 employees are covered by the law. Some private membership clubs that are exempt from taxation are also exempt from ADA.

d. ADA complaints are handled by the Equal Employment Opportunity Commission (EEOC). Enforced under Title VII of the Civil Rights Act of 1964.

2. (OVERHEAD 13) Much of the ADA legislation is identical to Section 504 of the Rehabilitation Act of 1973.

Section 504: Under Section 504, federal and certain federally-funded programs (including schools) are prohibited from discriminating against those with disabilities. The ADA extends this prohibition to businesses regardless of the receipt of federal funds (Section 504 dealt with public sector, ADA expands these protections to the private sector).

3. (OVERHEAD 14) A person is considered disabled under ADA (and Section 504) if that person has a physical or mental impairment that substantially limits one or more of the person's major life activities or a record of disability or is regarded as having a disability.

4. (OVERHEAD 15) How Does the ADA protect individuals with disabilities in the area of employment?

- a. Employment practices cannot discriminate against a qualified individual with a disability. Employment practices include all areas of employment; job applications, hiring, compensations, advancements, organized labor relations, training and termination. A person with a disability who is able to perform the essential functions of a job is considered qualified.
  
- b. (OVERHEAD 16) An essential function can be determined through employer judgement, job descriptions (written prior to the interview), the amount of time performing the function, consequences of not performing the function, and work experience of other workers in the same job. An essential function is where:

- 4. The position exists to do that function

- 5. There is a limited number of employees that can do the function

- 6. The function is highly specialized and an applicant is hired for their expertise.

- c. (OVERHEAD 17) The law requires employers to provide reasonable accommodations to assist in a person's employment. Sixty-nine percent of all individuals with disabilities require no accommodations. Reasonable accommodations can involve:

- 1. Structural accommodations

- a. Involves making buildings accessible

- b. Examples include ramps, convenient parking, doorway modifications, accessible restrooms, removal of barriers.

- c. ADA covers newly constructed commercial buildings.

- 2. Modification of the job itself

- a. Equipment: lowering work benches, substituting arm controls for hand/foot

controls, providing TYY or TDD equipment.

- b. Work Area: Moving an office to the ground floor, identifying hazards.
3. Work Schedule: Rest periods, adjusted hours, work at home.

Note: A 1995 Louis Harris Poll indicated that 90% of businesses support compliance with ADA especially in the area of employment discrimination but only 56% of the companies surveyed had established policies and programs to hire people with disabilities.

5. Financial assistance for ADA

- a. Disabled Access Tax Credit (up to \$5000 annually) assists small businesses (annual gross receipts of less than one million and 30 or fewer employees).
- b. Architectural and Transportation Removal Deduction (up to \$15,000) modifying building (not replacing normally depreciable property).

Note: The "Persons With Disabilities Protection Act" (General Statute 168-A) is a North Carolina law allowing persons with disabilities to file claims regarding discrimination in public accommodations, public service, and public transportation. The statute of limitations for this law is 2 years. The "Persons With Disabilities Protection Act" incorporates the language of the federal ADA, and includes "working" as a major life activity. Examples of discrimination include: denying interpreter services to a deaf person in a court hearing, doctor or lawyer's office, barring service animals accompanying a person with a visual impairment into a taxi or restaurant, or relegating a person in a wheelchair to the front row of theaters using stadium seating.

B. (OVERHEAD 18) Job Market Screening {NC Transition Manual, 201-203}

1. Contact the Chamber of Commerce for a listing of local businesses
2. Use your local Employment Security Commission
3. Monitor the want-ads
4. Check out job listing information boards
5. Look for help wanted signs

6. Look in the yellow pages of the telephone directory
7. Discuss job possibilities with the VR counselor
8. Visit local businesses with the aim of identifying their areas of need
9. Do natural support surveys with students and their families
10. Compare the requirements of various jobs in the community with the skills and interests of the students
11. Network

Note: It is important to involve the student and his family in the process of job development. The following suggestions for student/family involvement from Hagner and Dileo (1993) can be helpful:

- Have the student/parents make a list of people in their social network and their places of employment
- Have the student dial the phone to call the employer
- Have the student/parents photocopy resumes
- Have the student/parents tour workplaces
- Have the student/parents obtain applications
- Have the student write letters of interest (or at least sign the letter)

C. Guidelines for Contacting Employers {NC Transition Manual, 203-206}

1. Approach employers in a friendly, positive manner. Show your interest in helping the employer as well as the student. If looking for an individual placement, try to find the employer's need and indicate how you can help meet it. Research the business before making a contact. Remember that enthusiasm is a powerful persuader.
2. Visit the employer at a convenient time.
3. Try to talk to the person in the company who has the authority to make decisions about hiring.
4. Dress and conduct yourself in a professional and business-like manner. Be prepared to provide evidences of the professionalism of your services.
5. Use terms the employer can understand.
6. Fully explain your role and the role of school staff.
7. Have a brochure and business card available.

8. Be prepared with references. (Note: A person is 4 times more likely to be successful with a referral than with cold calls Nietupski, 1987).
9. Be prepared to give functional, work-related information about persons with disabilities. Present the skills of the student in a confident manner. Encourage employees to ask questions. Be prepared to overcome myths and stereotypes the employer might have in mind regarding persons with disabilities.
10. Explain financial incentives/support services.
11. Consider your contact with the employer as a "job interview."

## VII. Employer Concerns About Hiring Persons With Disabilities

A. A summary of 90 studies found that employers have negative attitudes about hiring persons with disabilities especially those with mental retardation (Greenwood and Johnson, 1987)

B. The VR Division of New Hampshire (1987) found that employer concerns included the ability of the individual to follow instructions, the ability to complete their work, the ability to work with others and safety.

C. A 1988 study in Arkansas and Oklahoma found that employers were concerned about productivity, social skills, and teamwork.

D. A 1991 study in Maine revealed that employers disliked being contacted by numerous agencies seeking jobs for persons with disabilities.

E. Krugel and Unger (1993) found employers had concerns about the implementation of supported employment.

F. A study conducted in North Carolina in 1999 involving over 10,000 employers found that 67% of employers had never hired a person with a disability simply because they had never been asked (Keul, 1999)

Studies show that employers perceive the benefits from hiring persons with disabilities to include: 1) dedication; 2) community image; and 3) personal satisfaction BUT those employers who had experience hiring persons with disabilities listed work quality in the top three benefits. Levy (1992) revealed that executives with direct experience with workers with disabilities are more supportive of the concept of hiring persons with disabilities.

Note: For more information pertaining to the above section see J. Nietupski, S. Hamre-Nietupski and D. Dileo (1997). *Employer Perceptions of Workers With Disabilities: Marketing Benefits, Responding to Concerns*, Training Resource Network, St. Augustine, Florida.

VII. (OVERHEAD 19) **Facts About Hiring Persons with Disabilities** ("Equal To The Task" by E.I. Dupont de Nemours and Company, Wilmington, Delaware, 1981) {NC Transition Manual, 207-208}. This study has been conducted in 1958, 1973, 1981, and 1990 with each one consistently findings that worker are safe, productive, and dependable.

- A. **Safety:** Fewer disabling injuries than the average worker exposed to the same job hazards; about the same number of minor injuries. Ninety-seven percent rated average or better in safety. (Recent studies have shown that those with visual impairments have a higher accident rate, however, many were related to accessibility problems).
- B. **Attendance:** Less sick time and un-excused absences than the average non-handicapped worker, fewer excused absences, also. **Punctuality** (non-tardiness) is above average. Eighty-six percent rated average or better in attendance.
- C. **Performance/Productivity:** Job performance and productivity, once a job is mastered, are equal to or better than those of non-disabled employees in similar positions. Ninety percent rated average or better in the performance of job duties.
- D. **Job Stability/Tenure:** Greater job stability and less turnover (longer tenure) than persons without disabilities performing similar jobs.
- E. **Job Satisfaction/Motivation:** Personal work qualities of motivation and job satisfaction are higher when compared to their non-disabled peers.

Note: This section can be used for discussion among students. Additional Facts About Hiring Persons with Disabilities (Tom, O'Bryant, *Facts About Hiring People with Disabilities*, Institute for Rehabilitation and Disability Management, Washington, D.C.)

1. **Will a worker with a disability make co-workers uncomfortable?**

Many people are at first uncomfortable around persons with disabilities, yet this feeling usually wears off over time. Also, workers can be prepared ahead of time.

2. **Isn't accommodating employees with disabilities in the workplace expensive and complicated?**

Berkeley Planning Associates did a study of job accommodations in 915 firms - over half of the accommodations cost nothing and another 18% cost less than \$100.00. Also, tax credits are available to help offset the cost of worksite accommodations up to \$35,000.

3. **Do workers with disabilities have poorer safety records than non-disabled workers?**

Employees with disabilities work safely and may be even more careful than their non-disabled colleagues. In a 1981 study of its employees, **Equal to the Task**, E.I. Dupont de Nemours and Company showed that 96% of its employees with disabilities rated average or above average in safety compared to 92% of its non-disabled employees.

4. **Are workers with disabilities difficult to supervise?**

Supervision issues are much the same for employees with disabilities as for any other employees. In 1987 the International Center for the Disabled (ICD), President's Committee on Employment of People with Disabilities together commissioned the Harris Poll to survey 921 managers on employing persons with disabilities. In the survey, 82% of the managers said employees with disabilities are not harder to supervise than non-disabled employees.

5. **Will fellow employees constantly need to stop what they are doing to help the employee with a disability?**

Many persons with disabilities perform their jobs with no assistance whatsoever from co-workers. The key is to match the employee's abilities with the requirements of the job. Also, don't all employees help each other on occasion?

6. **Do employees with disabilities perform as well as non-disabled employees?**

In the same survey by the Harris Poll mentioned above, 88% of top managers and line managers, rated job performance of workers with disabilities as excellent or good. On several specific criteria -- leadership ability, willingness to work hard, reliability, productivity, and desire for promotion -- the vast majority of



managers said employees with disabilities performed or well or better than non-disabled employees.

7. **Wouldn't most individuals with disabilities rather collect benefits than work?**

A Harris Poll and ICD survey (1986) reported that two-thirds of persons with disabilities who were unemployed would like to give up their benefits and go to work.

8. **Will workers with disabilities be absent more than other workers?**

E.I. Dupont de Nemours and Company found that 85% of its workers with disabilities rated average and above on attendance, only slightly less than the 91% rating achieved by other employees. However, a study by International Telephone and Telegraph of a 2000 member plant with 125 workers with disabilities found that the workers with disabilities had fewer absences than their co-workers.

9. **Will workers with disabilities cause the company's workman's compensation to rise?**

Workman's compensation rates are based primarily on industry type and company size and only secondarily on a company's individual accident rate. Since workers with disabilities have been shown to have better safety records than average, they should help lower, not raise the workman's compensation rates.

Furthermore, employers do not have to worry about paying extra costs for an accident that contributes to a pre-existing disability. All states provide second injury funds that cover the difference between the employer's liability for a new injury and the total benefits paid to an injured worker. Therefore the employer is not financially liable for any increase in the severity of injury due to a pre-existing disability.

10. **Will workers with disabilities cause company health insurance rates to rise?**

It is true that on average, persons with disabilities are hospitalized more than non-disabled persons. However, this situation is mitigated by the fact that, depending on disability, persons with disabilities may tend not to engage in the more

dangerous physical activities that cause non-disabled persons to need medical attention. Furthermore, health insurance rates may not be higher for a person with a disability if the disability is not due to a progressive disease, or if the disability is not one which tends to cause secondary health problems.

**VIII. Financial Incentives for Hiring Persons with Disabilities {N.C. Transition Manual, 211 - 213}**

Many potential employers are interested in the financial incentives available when hiring a person with a disability:

**A. Work Opportunities Tax Credit (replaces Targeted Job Tax Credit)**

1. A tax break for employers in the form of credits that are subtracted from the federal income tax payment owed by the business. It is based on wages paid per disadvantaged worker (includes handicapping conditions). Eligibility includes clients referred by Vocational Rehabilitation, qualified recipients of AFDC, veterans, food stamp recipients, summer youth, ex-felons. Begins after the first three months of employment. Tax credit of 35% of the \$6000.00 earned if employed for 180 days or 400 hours. Can not claim OJT and WOTC at the same time.

**B. On-The-Job Training Funds**

1. A wage subsidy program in which employers are reimbursed for the additional costs of training a worker with a handicapping condition.
2. The Workforce Investment Act provides funds in this area.
3. ARC's National Employment and Training Program (1-800-433-5255) Provides 1/2 of trainee's entry wages for first 160 hours and 1/4 of trainee's entry wage for the second 160 hours. Trainee must have 1) mental retardation 2) be at least 16 years old 3) be unemployed at least 7 consecutive days (or working part-time and looking for full-time) 4) must be competitive employment 5) employer must be year round 6) trainee must earn at least minimum wage 7) have to expectation to continue employment and 8) must work at least 20 hours per week.

**IX. (OVERHEAD 20) Large National Companies with Programs for Hiring Persons with Disabilities**

**A. Hardees Capabilities Program**

- B. Marriott Bridges Program (paid internships in senior year of high school. Uses their staff to orient and supervise)
- C. Sea World
- D. KOA (Kampgrounds of America)
- E. Dupont
- F. IBM
- G. Hewlett-Packard
- I. Pizza Hut Jobs Plus Program (A 1997 study of Pizza Hut's program by Zivalich and Weiner-Zivalich showed retention rates 4 - 5 times superior to those of non-disabled workers. The program resulted in a savings of 8 million dollars nationally due to reduced turnover).
- J. Caterpillar (1997 National Easter Seal Society's Award for Corporate Leadership)
- K. J.C. Penny (1997 Corporate Citizenship Award from the National Organization on Disability)
- L. Food Lion (1998 National Easter Seals Award for Cooperate Leadership)
- M. Kentah

Note: This can be used as a class activity or for review. **Employer Self-Test for Hiring Persons With Disabilities** (Supported Employment Infolines, October 1997)

A. True/False Test:

1. An employer must give preference to a qualified applicant with a disability over other applicants for a job.

Answer: False. According to the Americans with Disabilities Act, an employer need not give preference to a qualified applicant with a disability over other applicants for a job.

2. If a person with a qualified disability has informed the employer about his or her difficulty communicating at an interview, it is still up to the applicant to find a way to successfully overcome the problem.

Answer: False. If a person with a qualified disability has informed an employer about his or her difficulty communicating at an interview, it is up to the employer to find a way to successfully overcome the problem.

3. All my company forms should be in formats that are accessible to all persons with disabilities.

Answer: True. Forms must be accessible to persons with disabilities.

4. It is OK for applications and other company forms to ask disability-related questions.

Answer: False. Applications and company forms cannot ask disability-related questions.

5. It is a good bet that the cost of accident insurance will increase as a result of hiring a person with a disability.

Answer: False. Studies have shown no differences in insurance rates as a result of business' hiring of a person with a disability.

6. There are certain jobs that are more suited to persons with disabilities.

Answer: False. People with disabilities have succeeded in a wide range of jobs, based on their skills, aptitudes, and interests.

7. I don't have to hire a person with a disability if that person is not qualified to perform the essential functions of the job, even with a reasonable accommodation.

Answer: True. Employers need not hire applicants with disabilities who cannot perform the essential functions of the job with needed accommodations.

8. Most business staff will need special training to learn how to work with people with disabilities.

Answer: False. Although training can be advantageous for co-workers and supervisors to work better with people with disabilities, most will not need special training to work successfully with employees with disabilities.

9. Most reasonable accommodations made to help people with disabilities cost between \$1,000 and \$2,000.

Answer: False. Over half (69%) of accommodations for people with disabilities cost under \$50.00.

10. If an employee claims to be disabled and wants an accommodation, the employer cannot require verification of the disability, even if the disability is not obvious.

Answer: False. An employer may require verification of disability from an employee who is seeking an accommodation on the basis of his or her disability.

Suggested Videos:

1. Close Encounters of the Disabling Kind. (1992) Mainstream, Inc. Program Development Associates (800-543-2119). Information on the Americans With Disabilities Act presented in a humorous manner by a businessman faced with interviewing potential employees who have disabilities. (22 minutes)
2. ADA - Making It Work. (1992) Cynthia Kay/Wayne Glatz Film & Video, Inc. 214 E. Fulton, Grand Rapids, Michigan, 49503 (616-776-0354). Highlights several businesses who have successfully implemented the Americans With Disabilities Act. (20 minutes)
3. Hardees Capability: Project With Industry. Hardees, Roy Rogers, and FFM. Short film showing how Hardees corporations provide employment to persons with disabilities using natural supports and corporate policy. (10 minutes)

## Business and Industry Involvement

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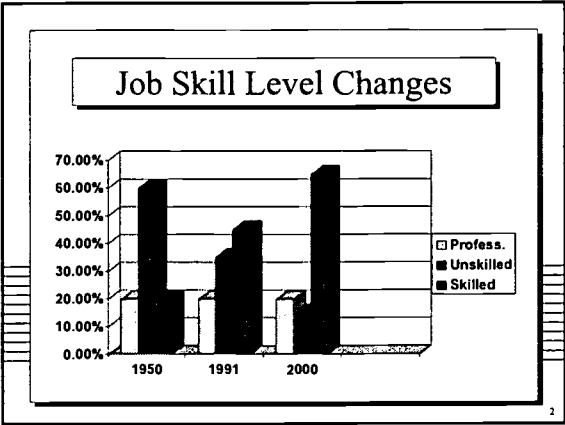
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*Service and Quality are the key words for businesses in the 1990's.*

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### Employers want workers who:

- solve problems
- get along with others
- are alert to safety
- can manage money
- anticipate problems



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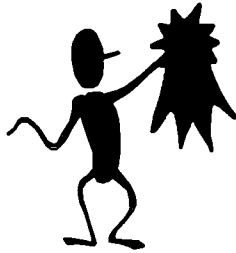
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### Successful Employment

- Getting along with others
- Interest in the job
- Efficiency
- Dependability
- Adaptability



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### Obstacles To Employment

- Economic and benefit disincentives
- Employer perceptions and attitudes
- Family beliefs and concerns
- Staff perceptions
- Lack of interagency coordination
- Transportation problems
- Lack of supported employment

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### Obstacles To Employment (continued)

- Lack of appropriate social, behavior and vocational skills
- Lack of transition services
- Lack of follow-up after job placement
- Labor market limitations
- Personal motivation to work
- Lack of family support

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### Failure to Maintain Employment

- Maladaptive behavior
- Dependence on supervision
- Inappropriate interactions
- Excessive tardiness/inadequate attendance
- Insufficient speed and accuracy
- Failure to communicate with supervisor
- Unacceptable personal appearance

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### Business Contributions

1. Additional resources/expertise
2. Provide sites for work experiences
3. Promote better understanding
4. Identify trends in economy
5. Provide contacts in business/industry
6. Advocates
7. Classroom speakers
8. Program consultation
9. Conferences and workshops

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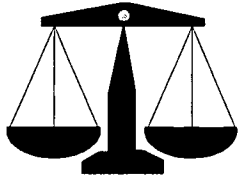
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## Americans With Disabilities Act (ADA)



- Employment
- Public Accommodations
- Transportation
- Telecommunications
- State/Local government

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## Section 504: 1973 Rehabilitation Act

*Prohibits federal and certain federally-funded programs from discriminating against persons with disabilities.*

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## ADA

- Definition of "disability"
- Which businesses are covered?
- Essential Functions
- Reasonable Accommodations (Structural and Job Modifications)

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**Job Market Screening**

1. Contact the Chamber of Commerce
2. Employment Security Commission
3. Want-ads
4. Job listing information boards
5. Help-wanted signs
6. Yellow pages
7. Vocational Rehabilitation Counselor
8. Visit businesses
9. Natural support surveys

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**Facts About Hiring  
Individuals With Disabilities**

- Safety
- Attendance
- Performance and Productivity
- Job Stability/Tenure
- Job Satisfaction and Motivation

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**National Companies**

- Hardees Capabilities
- Marriott Bridges
- Sea World
- KOA
- Dupont
- IBM
- Hewlett-Packard
- Pizza Hut Jobs Plus

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## **Lecture 9: Vocational Evaluation**

### **I. (OVERHEAD 2) Purpose of Vocational Evaluation**

- A. To provide a basis for helping to determine the most effective match between the world of work and a student's interests, abilities, and work environment preferences.**

### **II. (OVERHEAD 3) What Are The Goals of Vocational Evaluation?**

- A. To assess the vocational potential of special needs learners**
- B. To use assessment information as a basis for ongoing vocational counseling and goal setting**
- C. To place learners in appropriate vocational training and/or job training programs (e.g. trade schools, community college)**
- D. To design and implement individualized vocational training programs**
- E. To use vocational assessment/evaluation in individual education/transition planning (to identify optimal vocational outcome)**
- F. To identify functional limitations and eligibility for further rehabilitation services (e.g. Vocational Rehabilitation)**
- G. To identify needed services (e.g. job coaching, work adjustment)**

### **III. (OVERHEAD 4) Guiding Principles For Vocational Assessment and Evaluation (Excerpted from Fran Smith, Richard Lambard, Debra Neubert, Pamela Leconte, Carrie Rothenbacher, and Patricia Sittlington, "The Position Statement of the Interdisciplinary Council on Vocational Evaluation and Assessment," Career Development for Exceptional Individuals, 1996, Vol. 19, No. 1 in SE InfoLines - November 1996). {NC Transition Manual, 219-221}**

- A. A variety of methods, tools, and approaches should be used to provide accurate vocational evaluation/assessments. A broad range of questions must be posed to determine what makes an individual and his or her abilities and needs unique. Separating an individual's attributes into categories such as interest, aptitude, or learning style preferences helps organize assessment.**
- B. Vocational evaluation/assessment information should be verified by using different methods, tools, and approaches. There should be a healthy amount of doubt concerning**

assessment results. Using alternative methods or approaches to validate findings can usually be achieved by:

1. observing an individual's demonstrated or manifested behaviors, such as performances on actual work
  2. using an individual's self-report or expressed statements
  3. administering some type of survey, inventory, structured interview, or test
- C. Behavioral observation is essential to any vocational assessment process. Behavioral observation (e.g. observing physical performance, social characteristics, interactions with people, and other aspects of the environment) occurs throughout the assessment process. The observation process:
1. can be informal or formal
  2. can occur in a variety of environments
  3. can be made by a variety of people
  4. should be documented and presented in an objective, non-biased manner
- D. Vocational evaluation/assessment must be an ongoing and developmental process in career development. Individuals, especially those with disabilities, may need evaluations/assessments of varying degrees given at different junctures over their career life span.
- E. (OVERHEAD 5) Vocational evaluation/assessment should be an integral part of a larger service delivery system. Vocational evaluation/assessment should be the basis for planning needed services, resources and support. Vocational evaluation/assessment information should be interpreted and conveyed to the consumer as well as others within the system.
6. Vocational evaluation/assessment requires a collaborative approach to data collection and decision-making. Vocational evaluation/assessment requires the collection of input from a variety of individuals and requires an understanding of how to use the results of the assessment process. An interdisciplinary team approach allows for the effective use of information that can be translated into effective planning, implementation activities (e.g. placements, support services and counseling and fulfilled vocational development by consumers). The use of interviews with key persons in the evaluation process is important. Information

that can be collected from interviews include: the level of family support, desired employment outcomes, transportation possibilities, work history, and motivation/initiation.

7. Vocational evaluation/assessment should be current, valid, and relevant. Vocational evaluation/assessment is grounded in career, vocational, and work contexts.

IV. (OVERHEAD 6) **What Information Is Typically Gathered As Part of A Vocational Evaluation** {NC Transition Manual, 221-222}

A. Personal/Social Skills

1. Ability to get along with others (peers, authority figures)
2. Self-concept
3. Consistency of mood

B. Interests

1. What seems to be a person's preferences in terms of work activities, people and environments?
2. Look for types of skills (people, machines) and environments (indoors, outdoors, hi-demand, unstructured, etc.).

Examples of Interests Inventories: Kuder Occupational Interest Survey, Reading-Free Vocational Interest Inventory, Strong-Campbell Interest Inventory, Wide Range Interest-Opinion Test (WRIOT), Choices Jr., The COPSsystem Interest Inventory). Try to have a couple available for students to review.

C. Work Habits - includes such things as:

1. Endurance and on-task
2. Following instructions and safety rules
3. Being non-disruptive
4. Working rate and accuracy of work
5. Independently moving from task-to-task
6. Working under pressure (deadlines)

D. Aptitudes - includes such things as:

1. Gross and fine motor skills
2. Manual and finger dexterity
3. Ability to use tools
4. Strength and stamina issues

Examples of aptitude tests include the Career Ability Placement Survey (CAPS), and The Skills Assessment Module (SAM)

E. Functional academics - involves gathering information about:

1. Reading, writing, math, and communication as the skills relate to specific jobs.

An example of a functional academic test is the Street Survival Skills Questionnaire (SSSQ)

F. Medical

1. Health/medical information that could potentially impact on specific jobs (bad back, allergies, medications, seizures, etc.)

Note: NC Transition Manual, Appendix KK contains a descriptive list of commercial vocational evaluations.

V. (OVERHEAD 7) **Steps Involved in the Vocational Evaluation Process**

The information described above has traditionally been gathered through a four-step process. Sometimes all four steps are used, while at other times only one or two of the steps are used. Remember, that Vocational Rehabilitation can use information already obtained by school personnel.

A. Clinical Assessment

1. Typically, the first step in any vocational evaluation.
2. Involves collecting information from four sources -- medical, social, educational, and psychological

- a. Medical - involves gathering information to determine physical capabilities and limitations and their vocational implications.
- b. Social - involves gathering information about a person's social skills. Can use Adaptive Behavior Scales and interviews with families/teachers.
- c. Educational - looks at academic skills as they relate to jobs.
- d. Psychological - can involve gathering information on intelligence/personality. Need to make sure tests are appropriate and psychometrically sound.
- e. For all four items, the bottom line is to focus on a person's strengths and how they might relate to different vocational opportunities.

B. (OVERHEAD 8) Work Evaluation

1. Because Clinical Assessment data have not always proven to be good predictor of vocational success, the use of work (real and simulated) has become more widespread.
2. Again, the focus is on determining a person's strengths and potential.
3. Three basic types of work evaluations:
  - a. Standardized Tests: generally measures interests, aptitudes, or both. Often paper-pencil but some pictorial assessments are available. Weaknesses include:
    1. often need to have had some work experience to be able to make choices
    2. need to have good reading/language skills for many of the available tests
    3. lack of evidence that scores on formal tests are related to future success on a job
    4. no cues are provided regarding the student's ability to adapt

to a work environment  
5. many formal vocational assessments have not been standardized on individuals with disabilities

b. Work/Job Samples: involves having a person performing a real or simulated task (sorting mail, collating, following the steps on a video). The activity is well-defined and involves the tasks, materials, tools, and techniques which are identical or similar to those used in an actual job or job cluster. Work samples usually provide a better picture than paper-pencil tests since you can potentially assess specific work skills and general work skills (on-task, supervision, dealing with frustration). Advantages of Work Samples:

1. Tends to incorporate the realistic aspect of actual work within the "constraints of testing" but does approximate real-life jobs much more closely than tests do.
2. Can assess the potential in some students who psychometric tests may "rule out."
3. Provides actual samples of real work or a simulated sample of real work lacking only the some of the physical, psychological, and social demands of the job. Allows the student to be observed doing actual work in a controlled setting.
4. Allows the student to see themselves as doing a work task rather than a test.
5. Allows for the evaluation of many work behaviors/skills (e.g following directions, tool usage, acceptance of



supervision, motivation, self-concept, social skills, initiative, the ability to accept criticism, and attention span).

6. Provides information the student can use for career decision-making.

3. (OVERHEAD 9) Situational

Assessment: involves observing individuals in actual work settings. Typically involves gathering data using a skills checklist that includes both specific and general work skills. Advantages of situational assessment:

1. Offers the most realism of all assessment techniques Unlike other techniques this is NOT an artificial situation.

2. Situational assessment matches the "place and train" philosophy which is the basis of supported employment.

3. No problems with validity or reliability.

4. (OVERHEAD 10) A situational assessment allows the following questions to be answered:

1. Can the individual do the job? Do they have the general work skills or the potential?

2. Does the individual have the necessary behavioral skills?

3. Can the individual perform this type of job considering the physical and environmental demands?

4. How much prompting does the individual need to perform the job?

5. How much support and what

type of support does the individual need to do the job?

6. What goals/objectives need to be included on the ITP and the IPE?
7. What would be the best work schedule for the individual?

(OVERHEAD 11) Steps in Conducting A Situational Assessment:

1. Identify jobs in the community that would be appropriate for conducting situational assessment and contact the businesses to make arrangements.
2. Identify and analyze appropriate jobs (e.g. observe workers, develop job duties and task analysis).
3. Schedule the situational assessment session allowing at least 4 hours.
4. Record the observation.
5. Share the results (Moon, Inje, Wehman, Brooke, and Barcus (1990). Helping persons with severe mental retardation get and keep employment. Paul Brookes.

C. Work Adjustment (Go back to OVERHEAD 8)

1. Consists of a period of work experience followed by a planned sequence of training to remediate specific vocational deficiencies in identified work skills and/or habits. Basically this is a form of continuous evaluation and training.
2. Typically work adjustment has been done in simulated settings (school factories, sheltered workshops). Often viewed as "readiness training."
3. However, VR is now allowing schools to use CBT sites as work adjustment sites.

D. Job Site Evaluation

1. It is recommended that students have the opportunity to try out a competitive (paid) job as part of vocational evaluation. After all, it is the "best" way to tell whether or not an individual is both interested in and capable of performing a specific job.
2. Often called "work experience" in schools, but in most schools work experience is unpaid.
3. Supervision can vary from on-site school staff to having an on-the-job mentor.

E. To summarize, because students with disabilities learn best through hands-on, real-life experience, the most useful vocational evaluation methods are: work/job samples, situational assessment, work adjustment, and job site evaluations.

VI. (OVERHEAD 11) **How Can Students With Disabilities Get A Vocational Evaluation?**

A. Through Workforce Development Education

1. Typical 8th grade interest/aptitude testing
2. CDP+, Special Populations Coordinator

B. Through Vocational Rehabilitation

1. Upon referral, the VR counselor will gather vocational evaluation data, can also use existing records/data that have been collected within the past year.
2. Counselor may contract evaluation out to a separate agency (community rehabilitation agency) or a Vocational Rehabilitation evaluator may schedule a testing session with the student.
3. Counselor can also use school factories and CBT sites for work adjustment (e.g. TASSEL in Shelby City Schools and Buncombe County)

C. Through Special Education (On-Campus and Off-Campus Vocational Training Sites)

1. Sites may be authorized as VR work adjustment sites or not (most are not).
2. Special Education teacher and/or staff can collect vocational evaluation data as part of any of the following school or community-based sites (all discussed in more depth in earlier lectures):
  - a. job boxes
  - b. school factories
  - c. on-campus sites
  - d. job sampling
  - e. job shadowing
  - f. work experiences (paid and/or non-paid)
  - g. individual paid jobs
3. In fact, collecting vocational evaluation information on student interests, aptitudes, and work habits is part of the typical assessment of student performance that is gathered at every school or community-based site.
4. Special Education teachers can also administer vocational assessments.

D. (OVERHEAD 13) Individuals In the Vocational Assessment Process

Just as there are several ways that students can obtain evaluations, there are also a variety of professionals/individuals that can be involved in the process:

1. Special Education teachers
2. Guidance Counselors
3. Vocational Evaluators
4. Workforce Development Educators
5. Rehabilitation professionals
6. Vocational Support Service Personnel  
(Industrial Education Coordinator (IEC),  
Special Populations Coordinator)
7. School Psychologists
8. Social Workers
9. Employers
10. Job Coaches
11. Transition Coordinators
12. Case Managers
13. Parents

E. Steps Involved in the Assessment Process When

## A Student is Referred for Formal Assessment

1. Referral for assessment services
  - a. There are two schools of thought regarding the review of referral information:
    1. review of prior information may bias current assessment
    2. evaluation is only a "time-limited sample" of an individual's behavior/performance and vocational recommendations should be based on both prior and current information.
2. Intake procedures including file review:
  - a. Important information to gather includes: personal information, work history, education/training, personal and social adjustment, functional limitations of disability, vocational interests/goals, job-seeking experience
3. Orientation to the assessment process and environments
  - a. Explanation of process
  - b. Reason for referral
  - c. Appropriate dress
  - d. Time
  - e. Consumer rights/responsibilities
4. The initial interview
  - a. Establish rapport, give information, validate information
  - b. Determine consumer needs, specific vocational needs, vocational strengths, service needs, consumer attitudes, values and motivation.
5. Preliminary Testing
  - a. Academic achievement tests given to

assess reading, math, and writing skills may be done in a separate session prior to the vocational evaluation.

6. Assessment/Evaluation
7. Communication of assessment/evaluation results
  - a. Staffing conference (promote service delivery, address referral questions, provide additional information, highlight long/short term goals, problem solving, specific recommendations, seek agreement/commitment, determine timelines and specific course of action)
  - b. The Evaluation Report (written communication of significant vocational data, compares the consumer to job requirements, provides prescriptive recommendations)
8. Follow-up

VII. (OVERHEAD 14) **Summary Activity**

As a summary activity, have the students respond to OVERHEAD 10 (See answer key below)

- A. The answers are same for all the CBT "models:"
  1. Social skills (yes, if students interact with others or supervisor)
  2. Interests (yes)
  3. Work habits (yes)
  4. Aptitudes/skills (yes)
  5. Functional academics (yes, if job requires academic skills)
  6. Medical (probably not, but allergies or physical limitations might become evident).

Vocational Evaluation

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Purpose of Vocational Evaluation

To provide a basis for helping to determine the most effective match between the world of work and a student's interests, abilities, and work environment preferences.

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Goals of Vocational Evaluation

1. Assess vocational potential.
2. Use information for career counseling.
3. Choose appropriate training programs.
4. Design/implement individualized training programs.
5. Use information in transition planning.
6. Identify limitations and determine eligibility.
7. Identify needed services.

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### Guiding Principles

- A variety of methods, tools, and approaches should be used.
- Vocational assessment information should be verified by using different methods.
- Behavioral observation is essential.
- Assessment may be an ongoing and part of developmental process in career development.

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### Guiding Principles (continued)

- Vocational assessment should be an integral part of a larger service delivery system.
- Vocational assessment requires a collaborative approach to data collection and decision-making.
- Vocational assessment should be current, valid, and relevant.

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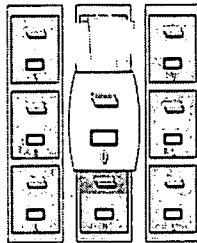
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### Information Gathered In A Vocational Assessment

- Personal/Social Skills
- Interests
- Work Habits
- Aptitudes/Skills
- Functional Academics
- Medical



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**Traditional Vocational Evaluation**

1. Clinical Assessment

- Medical
- Social
- Educational
- Psychological




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**Traditional Vocational Evaluation (continued)**

2. Work Evaluation

- Standardized Test
- Work and Job Samples
- Situational Assessment

3. Work Adjustment

4. Job Site Evaluation

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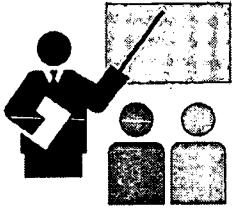
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**Ways To Get A Vocational Evaluation**

- Through Workforce Development Education
- Through Vocational Rehabilitation
- Through Special Education: School and Community-Based Training




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**What Vocational Evaluation  
Data Can We Collect?**

**Determine if social skills, interests, work habits, aptitudes/skills, functional academics, and medical conditions can be evaluated in the following "CBT" models:**

- School factories
- On-Campus Jobs
- Work Experience
- Work Samples/Job Boxes
- Job Sampling
- Job Shadowing
- Individual Jobs

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## Test Bank Items

Note: The suggested point values of each question is in parenthesis at the end of each question.

### Lecture 1: What Is Transition?

1. What is the major difference between OSER's Transition Model and Halpern's Transition Model? (2)

*OSER's model focused on transitioning students from school to employment. Halpern expanded the "Bridges" model to include transition to the community as a whole (e.g. employment, recreation, leisure, community services).*

2. Briefly summarize the Post-21 follow-up studies of former students with disabilities from the National Longitudinal Transition Study. (3)

*Underemployment, unemployment, low participation in post-secondary education, low wages, limited independent living, low participation in recreational opportunities*

3. If we consider transition to be "old wine in a new bottle", what two educational movements preceded the current transition mandate? (2)

*1960's            Cooperative Work-Study Programs  
1970's            Career Education*

4. What are two (2) transition mandates required by IDEA (1990)? (2)

1. *A transition component in the IEP no later than 16 or earlier if needed.*
2. *Statement of agency responsibilities and linkages.*
3. *Must include a statement of justification if services are not needed in an area.*
4. *If an agency fails to provide agreed upon services, the IEP team must be reconvened.*
5. *The student must be invited to the meeting if transition is going to be discussed.*
6. *If a student or agency doesn't attend the meeting, steps must be taken to gain their input.*

5. What does Section 504 of the Rehabilitation Act of 1973 prohibit? (1)

*Discrimination against persons with disabilities in programs/agencies receiving federal funds.*

6. List four (4) of the five areas in which the 1990 Americans With Disabilities Act (ADA) guarantees equal opportunity? (2)

1. *Employment*
  2. *Public Accommodations*
  3. *Telecommunications*
  4. *Public Transportation*
  5. *State and Local Governments*
7. How are the Education of Handicapped Children Act (PL 94-142) and the Carl D. Perkins Act similar? (1)
- They both mandate services for students with disabilities*
8. Which Act defined supported employment for Vocational Rehabilitation? (1)
- A. *Carl D. Perkins Vocational Education and Applied Technology Act*
  - \*B. *Rehabilitation Act Amendments of 1986 (PL 99-506)*
  - C. *Section 504 of the Rehabilitation Act Amendments of 1973*
  - D. *Americans With Disabilities Act (PL 101-336)*
9. What 1990 Act provided wide-spread civil rights protection to individuals with disabilities? (1)
- Americans With Disabilities Act (ADA)*

## Lecture 2: Transition Planning

1. Who must be invited to Individual Education Plan meetings if transition services are going to be discussed? (3)

*Student, parent, and agencies*
2. List the four (4) parts/sections that must be included in the transition component on the Individual Education Plan? (4)
    1. *Post-school outcomes/goals*
    2. *Transition activities*
    3. *Responsible persons*
    4. *Timelines*
3. Is "getting a diploma" a transition activity or an outcome? (1)

*A transition activity*

4. List the four (4) domains of post-school outcomes for the transition plan. (2)

1. *Post-secondary education/training*
2. *Employment*
3. *Residential*
4. *Recreation/Leisure*

5. List two (2) methods of obtaining student input and participation in the transition planning process. (2)

1. *I-Plan*
2. *SHARE*
3. *Dream sheets*
4. *Student inventories*
5. *Role-playing*
6. *Self-advocacy training*
7. *Appropriate behavior toward student*
8. *Getting input (questions, telling, etc.)*

6. Jermaine is a 17 year old who has been served as Educable Mentally Handicapped (EMH) in a functional academic program at his local high school. Jermaine has no health problems other than occasional problems with sinus infections. According to vocational assessments, Jermaine has an interest in working with people, repairing things, gardening, animals, and computers. Jermaine possesses good social skills, verbal communication skills, and fine motor skills. He has difficulty with written communication and his reading/math skills are at about a third grade level.

During the last two years, Jermaine has participated in off-campus vocational training at a local athletic supply store, a fast food restaurant, a vet's office, a cafeteria, a gas station, and a printing company. His favorite experiences were the gas station and the vet's office. Jermaine also has had a successful part-time job at McDonald's for the last 8 months. Jermaine would like to get his driver's license but at the present time must rely on his mother for transportation. Jermaine participates in activities at the local recreation department and hangs out at the mall. Presently he lives with his single mom in a public housing division. Jermaine would like to stay with his mom at least 2 years after graduation but has hopes of getting out on his own someday. Jermaine's mother works at Burger King and he has an older brother who is a mechanic.

Write potential post-school outcomes/goals for Jermaine in two (2) of the domains required on the Individual Transition Plan. (2)

Note: The following are examples. Answers will vary.

*Education: Jermaine will enroll at the community college in remedial reading and math classes (Adult Basic Education) and Introduction to Computers.*

*Employment: Jermaine will work part-time as a auto mechanic assistant at a gas station within walking distance from his home.*

*Residential: Jermaine will live with his mother after graduation with plans to move into an apartment within two years of graduation.*

*Recreation/Leisure: Jermaine will participate in community recreational activities and personal hobbies based on his personal interests.*

### **Lecture 3: School-Based Transition Activities**

1. List three (3) reasons that transition services resulting in high school completion and effective preparedness for adult life should be a priority. (2)
  1. *Decrease governmental dependence*
  2. *Increase employment*
  3. *Prevent lost personal income and lost tax revenue*
  4. *Increased integration, acceptance, productivity, self-worth, and personal satisfaction.*
  5. *Paid work in high school increases chance of future employment.*
  
2. List two (2) findings from the results of studies concerning the success of students with disabilities while in high school. (2)
  1. *Entry level Workforce Development Education courses*
  2. *Negative attitude*
  3. *Poor attendance*
  4. *High drop-out rate*
  5. *Academic failure*
  6. *Limited work experience*
  7. *Low achievement test scores*
  8. *Behavior problems*
  
3. List the three (3) major curriculum areas of the Life Centered Career Education curriculum. (3)

*Daily Living Skills*  
*Personal-Social Skills*  
*Occupational Skills*
  
4. Briefly describe one (1) occupational guidance technique and one (1) occupational preparation technique. (2)

Note: In order for answer to be correct student will need to describe the technique.

Occupational Guidance

1. *Counseling*
2. *Job Analysis*
3. *Simulations of Business/Industry*
4. *Field Trips and Speakers*

Occupational Preparation

1. *Work Tasks and Projects*
2. *Simulations of Business/Industry*
3. *Internships*
4. *Experience-Based Career Education (Job Shadowing)*
5. *Workforce Development Education*
6. *Supported Employment*

5. List the stages of Career Education. (2)

*Career Awareness*  
*Career Exploration*  
*Career Preparation*  
*Career Assimilation*

6. Name and briefly describe the three (3) approaches to academics for students with disabilities. (3)

Remedial: *Improve basic academic skills aimed at ensuring inclusion in a regular education program. Focus is on reading, math, and communication.*

Maintenance: *Tutoring in nature. Emphasis on providing direct/indirect support to students in regular education classes. Students learn note-taking skills, test-taking skills, study skills, etc.*

Functional: *Emphasizes teaching skills that have a high likelihood of being used in the community and independent life.*

7. List two (2) things to consider when determining the functionality of a skill you are planning to teach. (1)

1. *Is the skill necessary to prevent impending transfer to a more restrictive environment?*
2. *In how many future environments will the skills be used?*
3. *How often will the skill be used each day?*
4. *Is the skill reasonable to teach, given the student's present skill level?*
5. *Does the skill promote integration?*
6. *Does the skill improve the quality of life?*
7. *Is the skill necessary for medical reasons?*

8. *Would the student (if able) choose to learn the skills? Would the parents choose for their child to learn this skill?*
9. *Is the skill age-appropriate?*
10. *If the student can't do this task, will it have to be performed for them and if so, does it matter in the bigger scheme of things?*

8. Your school has asked you to develop a functional curriculum for all students with special needs. As you gather your materials, you find that the LCCE does not cover all the skills you feel need to be included. Therefore, you decide you need other references. Name two (2) additional curricula you might consider. (1)

- *Syracuse Community-Referenced Curriculum Guide*
- *Community-Based Curriculum: Instructional Strategies for Students with Severe Handicaps*
- *The Activities Catalogue*
- *Impact*
- *The Walker-Social Skills Curriculum: The ACCESS Program*
- *A Curriculum on Sex Education and Social Skills Training (DDTI)*

9. Identify one competency or subcompetency from one of the three LCCE curriculum areas and briefly describe what you would teach in each stage of career development. (5)

*See lecture notes and Brolin's book.*

10. Describe two (2) work stations that would be appropriate for a school-based factory or school-based enterprise. Explain "why" these jobs would be appropriate. In other words, what work habits, behaviors, or skills could be learned from performing these jobs. (4)

*Page 125 of the DPI Transition Manual lists suggestions for work stations.*

11. Describe one (1) on-campus job appropriate for student who is Educable Mentally Handicapped. List three (3) skills a student could obtain from this experience. (2)

*Page 130 of the NC Transition Manual lists suggestions for on-campus jobs.*

#### **Lecture 4: Workforce Development Education**

1. List two (2) of the ten assurances for members of special populations under the Carl D. Perkins Vocational and Applied Technology Education Act of 1990. (2)
  1. *Equal access to recruitment, enrollment, and placement.*
  2. *Equal access to full range of available Workforce Development Education*



- programs available.*
3. *Provision of Workforce Development Education in the least restrictive environment.*
  4. *Vocational planning for individuals with disabilities coordinated by representatives of Workforce Development Education, Special Education, and state Vocational Rehabilitation agencies.*
  5. *Workforce Development Education monitored for students with disabilities to ensure consistency with their IEP.*
  6. *Notification to members of special populations and their parents at least one year prior to eligibility including information about specific courses, services, employment opportunities, and job placement.*
  7. *Assistance with transitional service requirements for individuals with disabilities.*
  8. *Provision of supplementary services including such things as curriculum modification, equipment modifications, classroom modification, supportive personnel, and instructional aids and devices.*
  9. *Provision of guidance, counseling, and career development activities by professional trained counselors and teachers.*
  10. *Provision of counseling and instructional services designed to facilitate the transition from school to post-school employment and career opportunities.*
2. List the three (3) programmatic requirements/elements of the School-to-Work Opportunities Act. Give an example for each of the three (3) requirements. (3)
1. *School-Based: Career awareness, career counseling, selection of a career major, program of instruction consistent with Goals 2000, applied academics.*
  2. *Work-Based: Workplace experience, structured training, mentoring, and apprenticeship.*
  3. *Connecting Activities: Job matching, establishing liaisons, job placement, further training assistance, participation of business in education.*
3. Name one (1) Workforce Development Education "player" and list one of their job responsibilities. (1)
- Special Populations Coordinator  
Industrial Education Coordinator  
Career Guidance Counselor  
Workforce Development Education Teacher*
- See lecture notes for a complete listing of responsibilities.*
4. In North Carolina, the School-To-Work Opportunities Act is implemented under what program? (1)

*JobReady*

5. How are economically disadvantaged special populations students defined? (2)

- *AFCID*
- *Food stamps*
- *Chapter 1*
- *Free/Reduced Lunch*
- *Department of Corrections*

6. What is the primary overall role of an Industry-Education Coordinator? (1)

*To connect schools with the business community*

7. What is the difference between IDEA and 504 students?

*Students identified under IDEA are also covered under Section 504. Students identified under Section 504 are not eligible for IDEA services.*

8. How do the students labelled as members of special populations or special education differ?

*Students being served through special education services are identified under IDEA categories. Special populations encompasses a broader range - Section 504, economically disadvantaged, academically disadvantaged, etc.*

**Lecture 5: Interagency Collaboration and Team Meetings**

1. List one responsibility of a Community Level Transition Team. (1)

1. *Needs assessment*
2. *Interagency agreement*
3. *Clarify roles of service providers*
4. *Provide information (services, new programs, grants, legislation)*
5. *Community resource handbook*
6. *Strategies for overcoming barriers*
7. *Networking*
8. *Staff development*
9. *Coordinate job placement and job development*
10. *Seek funding*
11. *Community awareness*
12. *Problem solving (clarifying roles, changing policies, guidance)*

2. List one responsibility of a School Level Transition Team. (1)

1. *Conduct transition planning/exit meetings*
2. *Assist in setting post-school goals*

3. *Collect/disseminate student information*
4. *Identify agency responsibilities/funding*
5. *Develop timelines*
6. *Solve problems/eliminate barriers*
7. *Recommend changes in programming*
8. *Provide follow-up on services not provided*
9. *Provide information about agency responsibilities*
10. *Transfer case management*
11. *Evaluate program effectiveness*
12. *Determine additional team member responsibilities*

3. Describe two roles that families can play in the transition process. (2)

1. *Advocates*
2. *Providers of information*
3. *Role models*
4. *Case managers*
5. *Program advocates*
6. *Risk takers*
7. *Financial planners*

4. Which is NOT an overall goal of a Community Level Transition Team? (1)

- A. *Establishing guidelines*
- B. *Conducting a community needs assessment*
- \*C. *Writing individual transition plans*
- D. *Developing interagency agreements*

5. Briefly discuss one way in which families can help their son/daughter with the career/vocational process. (1)

1. *Develop stamina/coordination*
2. *Set up home workshop*
3. *Assign chores*
4. *Support a part-time job*
5. *Discuss jobs of relatives*
6. *Model a good work ethic*

6. List one (1) type of parental attitude that can hinder the career/vocational process? (1)

1. *Family traditions*
2. *Class snobbery*
3. *Comparison with siblings*

## Lecture 6: Adult Services

1. Briefly describe what Single Portal is and how it works. (1)

*If an individual is in need of 24 hour MR/DD services or any ongoing service more than 3 consecutive hours in duration he/she needs to go through Single Portal. Legislatively mandated, person-centered, review procedures for all individuals entering/exiting day, night, and residential services. Interagency committee. Determines level of needed service, track service delivery, develop waiting lists and prevents duplication. May be approved, given choices or placed on waiting list.*

2. What "key" change (concerning eligibility) was included in the Rehabilitation Act Amendments of 1992? (1)

*Individuals with disabilities including individuals with the most severe disabilities are generally presumed to be capable of engaging in gainful employment and the provision of individualized, vocational rehabilitation services can improve their ability to become gainfully employed.*

3. What is the definition of supported employment included in the 1986 Amendments to the Rehabilitation Act? (3)

*"Competitive employment in an integrated setting, with on-going support services for individuals with severe handicaps for whom competitive employment has not traditionally occurred, has been interrupted, or intermittent as a result of severe handicaps or transitional employment for persons with chronic mental illness."*

4. List and briefly describe the four models of supported employment. (4)

1. *Job Coach Model: Individual works in competitive employment setting. Initial one-on-one training. Long-term support and follow-up. Competitive wages earned.*
2. *Enclaves/Workstations: A small group (no more than 8) work in a competitive setting under the supervision of a job coach. The group works together to accomplish a "group work project."*
3. *Mobile Work Crew: Organized around a single-purpose business. A small group (no more than 8) moves about the community, performing work for local businesses. Supervised by a job coach often operated out of Community Rehabilitation Agency. Allows for accommodations of individuals with varying abilities.*
4. *Entrepreneurial Model (also called Small Business Model): Provides employment to individuals with disabilities through establishment of a small business. Business is staffed by individuals with and without disabilities.*

5. List two of the primary responsibilities of the job coach. (1)

1. *Job placement*

2. *Job site training and advocacy*
3. *On-going monitoring*
4. *Follow-up and retention*

6. What is a PASS (include name and definition)? (2)

*Plan for Achieving Self-Support*

*A person with a disability who is employed may develop a plan to set aside (save) income resources in order to achieve an occupational goal. Utilization of a PASS can allow the exclusion of earned and unearned income when calculating SSI benefits. Any funds set aside under a PASS are not counted when figuring SSI benefits. A PASS must be:*

1. *in writing and pre-approved by SSA*
2. *have obtainable specific work goal*
3. *designate the timeline for obtaining the goal (usually not longer than 48 months)*
4. *indicate income resources that will be set aside and how they will be used*
5. *designate how income resources used to obtain goal will be kept separate from other personal funds*

7. Name three adult service providers that could be included in the transition process for a student who is trainable mentally handicapped. List one service (for each agency) that could be provided. (3)

*Vocational Rehabilitation Counselor  
 Rehabilitation Engineer  
 Mental Health Case Manager  
 Vocational Evaluator  
 Job Coach  
 Compensatory Education Coordinator  
 Respite Worker*

*See lecture notes for examples of services.*

8. What is the purpose of the Job Training Partnership Act (JTPA)? (1)

*To prepare youth and adults facing serious barriers to employment for participation in the labor force by providing job training and other services that will result in increased employment and earnings, increased educational, and occupational skills, and decreased welfare dependence, thereby improving the quality of the workforce and enhancing the productivity and competitiveness of the nation.*

**Lecture 7: Community-Based Training**

1. Name the three vocational "training" components specifically mentioned in the Dear Colleague. (3)

*Vocational Exploration*  
*Vocational Training*  
*Vocational Assessment*

2. In which CBT model do students spend short periods of time at a business, trying out various kinds of jobs?

*Job Sampling*

3. Your school is about to implement community-based training (CBT). However, before you start your principal has asked you to develop a plan to staff CBT. Your plan must include the following:
- A. A brief description of your students (ages, grades, disability), and
  - B. A description of two possible strategies and an advantage and disadvantage of implementing each staffing strategy. (6)

*Possible strategies include staggered implementation, heterogeneous grouping, use of related services, use of paraprofessionals, and team teaching. See lecture notes for advantages and disadvantages.*

4. Any student, aged 14 - 17, who is working for pay must apply for what document?

*Work permit*

5. Judy, age 16, works for 45 minutes each day in a non-paid, work experience program with a groundskeeping crew at her high school. Judy's school system contracts all groundskeeping to an agency called "Clean and Green." Does this meet the DOL regulations? Why? (2)

*No, because Clean and Green is an outside agency.*

6. Chakita, age 15, works in her school factory each day for 1 ½ hours. One of her jobs is to stuff envelopes for the local United Way. Chakita choose to do this task over other tasks that included pay. Since both Chakita and her teacher consider this a volunteer activity, Chakita is not paid. Does this meet the DOL regulations? Why?

*Yes, United Way is a volunteer agency and Chakita chose to do this type of work.*

7. List the four major issues concerning community-based training and a possible solution for each. (4)

*The issues are funding, staffing, transportation, and liability. See the lecture notes and the NC Transition manual page 161 - 171 for possible solutions.*

8. List the name of one potential community-based vocational training site, a job at that site (that could be "experienced" by a student) and one job duty of that job. (3)

*Answers will vary.*

9. Determine if the following situations comply or does not comply with the FSLA guidelines for placing students in community-based training sites. (4)
- A. Bob is 18 years old with a diagnosis of mental retardation and autism. His teacher placed him in a nonpaid training site folding pizza boxes for one (1) hour per day. Initially, Bob needed intensive instruction on the task, however now he is independently folding a box every 15 seconds. The store manager suggested that Bob could continue in his training program without the teacher. Does this meet DOL regulations? Why or why not based on the information in the Dear Colleague letter.

*No: students are benefiting company - does not need assigned supervision - has met training goal.*

- B. Sally is 16 years old and is working with her teacher at a local hotel. As part of the non-paid community-based training program, she is learning to empty the dryers and fold towels. The teacher has promised that they will complete the same amount of work as the regular employee. While Sally completes these tasks, the hotel employee will collect laundry from the guest rooms. Does this meet DOL regulations? Why or why not based on the information in the Dear Colleague letter.

*No: employee have not been relieved of responsibilities - should not benefit company.*

## **Lecture 8: Business and Industry Involvement**

1. List four (4) obstacles to employment for persons with disabilities. (2)
1. *Economic and benefit disincentives*
  2. *Employer perceptions and attitudes*
  3. *Low expectations by family and professionals*
  4. *Fears and concerns of family members*
  5. *Lack of family support*
  6. *Lack of interagency support*
  7. *Lack of transportation*
  8. *Lack of supported employment*

9. *Lack of appropriate social, behavior, and vocational skills*
  10. *Lack of follow-up after job placement*
  11. *Lack of personal motivation to work*
  12. *Lack of comprehensive transition services*
2. List two (2) ways in which business/industry can assist with an educational program. (1)

- *Additional resources and expertise*
- *Increasing understanding between business and education*
- *Identification of trends in economy*
- *Advocates*
- *Program consultation*
- *Provision of training and work sites*

3. How would you respond to an employer's concern about the safety of workers with disabilities on the job? (1)

*According to the DuPont study workers with disabilities have fewer disabling injuries than the average worker exposed to the same job hazards; about the same number of minor injuries.*

## **Lecture 9: Vocational Evaluation**

1. Which is not a type of clinical assessment? (1)
- A. *Medical*
  - B. *Social*
  - \*C. *Familial*
  - D. *Educational*

2. Which is not a type of work evaluation? (1)
- A. *Work and job samples*
  - B. *Situational assessment*
  - \*C. *Intake and other counseling interviews*
  - D. *Interest and aptitude tests*

3. Why is job-site evaluation so important? (1)

*Test out a person in a real job*

4. Which is not a component of traditional vocational evaluation?
- A. *Clinical assessment*
  - B. *Work evaluation*
  - C. *Work adjustment*
  - D. *Job-site evaluation*
  - \*E. *All of the above are components*



5. What CBT vocational evaluation technique could you use to assess student interests. Justify your answer. (2)

*Work samples, school factory, job sampling, job shadowing, work experience. The justification will vary based on the technique chosen.*

6. What CBT vocational evaluation technique could you use to assess student habits/attitudes? Justify your answer. (2)

*Work samples, school factory, job sampling, job shadowing, work experience. The justification will vary based on the technique chosen.*

7. What CBT vocational evaluation technique could you use to assess student aptitudes/skills? Justify your answer. (2)

*Work samples, school factory, job sampling, job shadowing, work experience. The justification will vary based on the technique chosen.*

## **Comprehensive Final Examination**

### Case Study

Mike is a second semester junior at Clinton High School. Mike is a strong, healthy and attractive 17 year old. He has been served through the Special Education department as Educable Mentally Handicapped (lower range). Mike was identified in the first grade. During the elementary years, Mike was served in a resource room three hours per day for academics with his other classes provided in an age-appropriate classroom until the fourth grade. That year, Mike was placed in a self-contained classroom at his neighborhood school except for physical education, music, lunch, art, and assemblies. Mike was moved to a special purpose school at the beginning of his sixth grade year due to poor attendance, behavior problems, lack of academic progress, a need for a functional curriculum, and the need for a low staff-student ratio. Mike remained in a special purpose school until the eighth grade at which time, Mike was returned to his neighborhood middle school. During his last year of middle school, Mike was again placed in a self-contained classroom for all academic subjects and mainstreamed for physical education, lunch, assemblies and vocational education classes. When Mike moved to Clinton High School, he was enrolled in a functional academic program (with a strong vocational component) aimed at preparing Mike for successful transition from school to adult life. This decision was made in conjunction with Mike and his family, since all parties felt that Mike would be unable to successfully complete the North Carolina requirements for an academic diploma.

Mike's traditional academic skills are limited however he has developed some academic skills related to functioning within the community after graduation. Mike has a reading level of

2.0 and a math level of 3.0 according to traditional testing measures. Functionally, he is working on (and doing quite well) the following skills:

1. Functional English

- Completing a job application
- Interviewing skills
- Writing a simple thank-you letter
- Completing work related forms

2. Functional Math

- Understanding a paycheck
- Completing a timesheet
- Balancing a checkbook (using a calculator)
- Comparison shopping
- Basic math operations (using a calculator)

3. Functional Science

- Preventing illnesses
- Making a doctor's appointment
- Visiting a doctor
- Medicaid benefits
- Responsibilities of marriage and parenting
- Family Life Planning

4. Career Preparation

- Self-advocacy training
- Work behaviors and work habits (punctuality, self-evaluation of work, accepting criticism from a supervisor, on-task behavior, organizing work materials, increasing productivity - both quality and quantity)
- Development of a Job Placement Portfolio

5. Functional Social Studies

- Understanding the voting process

Since enrolling in the high school program Mike has had the following vocational related experiences:

1. Workforce Development Education courses in Horticulture, Woodworking, Graphics, and Auto Mechanics
2. School Factory (Mike presently holds a supervisory position and is earning \$1.00 per hour for up to 40 hours per month through V.R. work adjustment funds)
3. Small Business (Mike assisted with the manufacture and marketing of buttons sold for the Pep Club)
4. On-Campus Jobs (school cafeteria, custodial, physical education department, guidance office and art department). Mike is presently working at a school cafeteria at one of the local elementary schools for 3 hours per week earning minimum wage per hour through Carl Perkins funds.
5. Job Shadowing (all non-paid)
  - A. Downtown Texaco (assisted in pumping gas, changing tires, checking fluid levels, changing oil, changing fuses, washing cars, and customer service)
  - B. Handy Florist Shop (assisted in maintaining plants, preparing gift baskets, delivering flowers, putting up stock, and cleaning the shop)
  - C. Jones Cafeteria (assisted with simple food preparation, making salads, washing dishes, bussing tables, clean-up, and wrapping silverware)
  - D. City Sporting Goods (assisted with answering customer questions, stocking, straightening shelves, cleaning stockroom)
  - E. City Recreation Department (assisted with cleaning facilities, mowing grass, trimming shrubs, picking up trash, organizing equipment, answering the phone)
  - F. Low Prices Grocery (assisted with stocking, fronting shelves, bagging groceries, cleaning and preparing produce, putting out seafood, and cleaning store)
  - G. Happy Dry Cleaners (assisted with customer service, bagging laundry, carrying laundry to cars, tagging clothes)
  - H. Fred's Construction Company (assisted with simple carpentry type work on new homes)
6. Summer employment (for two summers) through the JTPA program in custodial work at a local elementary school. Mike was paid minimum wage per hour.
7. Brief part-time employment (after school and on week-ends) at a local fast food restaurant. Responsible for sandwich preparation and cleaning. Lasted 6 months. Mike quit the job without notice because he felt the manager was "picking on him". After this experience, Mike went out and got another job collating

packages at a local printing shop but was only at this job for 1 week before he lost his ride to work and had to quit (again without notice).

According to formal vocational testing, Mike has a high interest in occupations that are people-oriented and require hands-on activities. Mike reports an interest in areas that are traditionally male-oriented (sports, groundskeeping, auto mechanics, and construction), although he is open to other areas. Mike has stated that he would like to learn more about cars. According to work site evaluations, Mike is very capable at most of the job skills he has tried if they are presented initially in small tasks. He is a hard worker, responds well to praise, punctual, exhibits good stamina and is not negatively affected by uncomfortable working conditions (heat, cold, fumes, etc). Mike's problems on job sites tend to be in the area of social skills. Mike is a big talker and is easily distracted from his work when a conversation is started with him. He appears indifferent to social hints of when social time should stop and work time should begin. Mike also does not accept criticism well and tends to pout and occasionally become verbally aggressive when his work is criticized. However, in general, the people with whom Mike has worked seem to like him.

Mike presently resides with his grandparents in a trailer about 5 miles outside of town. There are no businesses close to Mike's home. Mike has lived with his grandparents since he was 4 years old (at which time his mother abandoned him and moved to another state). Mike appears quite happy with his present residential situation although he (like most young people) look forward to a time when he can move out on his own. Mike's grandparents are both elderly and not employed (living on social security). They are both active members of the local Methodist church but Mike has not been attending regularly. This has caused a problem between him and his grandmother. Mike receives an SSI check and has medicaid. There are two uncles and one aunt that help with Mike's supervision and care. Mike's grandmother has expressed some concern about what would happen to Mike, if she or her husband were no longer able to provide a place for him to live. However, she hopes that other family members would step in and help. Mike's grandmother is very concerned about Mike losing his SSI check when he gets older and possibly begins to work. She and her husband depend on the check to help with household expenses and she views the check as a "safety net" for Mike.

At school, Mike is not involved in any school clubs. He "hangs-out" with two other boys who are also in special classes. One of the boys has his driver's license and Mike and his friends often go to the mall to hang out. Mike also enjoys watching TV and playing video games. Mike usually attends the football games at the high school. He briefly had a girlfriend last year and became sexually active. At the present time, Mike is not involved in alcohol or drugs but his teachers are concerned since some of his friends have been in the past and may still be. Mike has expressed an interest in playing organized sports, drag racing, and weight training. Mike hopes to get his driver's license some day, but his grandparents do not own a car. They rely on relatives and friends for transportation.

### Questions for Case Study

1. List a possible post-school outcome goal for each of the following domains: employment, post-secondary education, recreation/leisure and residential. (4)
2. List three (3) transition activities for each of the four domains that would be appropriate for Mike's senior year. (6)
3. List three school-based personnel you would invite to Mike's transition team meeting. (3)
4. List four adult service agency representatives you would invite to Mike's transition team meeting and one service you anticipate they would provide. (4)
5. List three types of information you would gather through vocational assessment. (3)
6. List two (2) strategies you would use to ensure that Mike was "truly" involved in the transition process. (2)
7. List two strategies you would use to ensure that Mike's grandparents were "truly" involved in the transition process. (2)
8. List four (4) strategies/activities that you as Mike's Transition Teacher would hope had been done with Mike during the K - 8 years to prepare Mike for effective transition from school to adult life. (4)
9. List two (2) major barriers for Mike's success in adult life. (2)

## Lecture 1: What Is Transition? Study Guide

1. Why should transition be a priority? What problems experienced by students with disabilities can transition effectively address?
2. What are the results/outcomes of the National Longitudinal Transition Study post-21 studies?
3. Why can transition be called "Old wine in a new bottle?"
4. Why is the completion of high school particularly important for students with disabilities?
5. Compare and contrast OSERS Transition Model (Will, 1984) with Halpern's Model.
6. What are some of the "characteristics" of students with special needs in high school programs?
7. Name and briefly describe some of the major pieces of legislation that provide the legal context for transition.

## Lecture 2: Transition Planning Study Guide

1. Differentiate between an IEP and the transition component of the IEP.
2. What is required in the area of transition for students who are 14 years of age?  
What is required in the area of transition for students who are 16 years of age?
3. What is the “age of majority”?
4. Name the four domains for post-secondary goals that should be addressed on the transition component of the IEP.
5. What transition activity areas must be included on transition components of IEPs?  
(Be able to give examples)
6. What are the four parts of the transition component of the IEP?
7. Describe a method for gathering student and/or parent information prior to developing the transition component of the IEP.
8. What does IDEA require school systems to do in the area of adult service involvement in the transition process? What should happen if an adult service agency does not follow through on promised services?

## Lecture 3: School-Based Transition Activities Study Guide

1. What is the LCCE?
2. Differentiate between career education and Workforce Development (vocational) Education.
3. What are the major curriculum areas of the LCCE?
4. List and give examples of the four stages of career development.
5. What is the concept of "infusion" in the LCCE?
6. What are the four pathways leading to a North Carolina High School diploma?
7. Describe the three types of North Carolina graduation documents.
8. What are the primary courses for the Occupational Course of Study? What are the vocational training requirements?
9. Describe three approaches to teaching students with disabilities used in high schools.
10. Define the four guidelines for functional curriculum development.
11. List and describe two types of on-campus vocational training options.
12. How does the Fair Labor Standards Act relate to on-campus jobs?
13. What are some appropriate jobs for training in on-campus jobs and in a school factory? Why are they appropriate?



## Lecture 4: Workforce Development Education Study Guide

1. What is the Carl Perkins Act?
2. How do the terms “special populations” and “special education” differ?
3. What are the three categories of special populations? Who is included under each category?
4. Be able to describe and discuss Tech Prep, the School-to-Work Opportunities Act, and Goals 2000. What are the primary component of each piece of legislation?
5. What are the barriers to employment for persons for disabilities?
6. Who are the major players in Workforce Development Education and what are their job responsibilities?
7. What are Career Development Plans, and Career Development Plus Plans? How do they relate to the transition component of an IEP?
8. What is the relationship between the School-To-Work Opportunities Act (STWOA) and the Individuals With Disabilities Act (IDEA)?
9. What are some practical suggestions for coordinating Special Education and Workforce Development Education?

## Lecture 5: Interagency Collaboration and Team Meetings Study Guide

1. List and describe three models of interagency coordination.
2. List three benefits of interagency collaboration.
3. What is the Community Level Transition Team? What "positions" are appropriate for serving on the Community Level Transition Team? What are the responsibilities of the team?
4. What is the School Level Transition Team? What "positions" are appropriate for serving on the School Level Transition Team? What are the responsibilities for the team?
5. Describe person-centered planning and its role in the transition planning process.
6. What are some strategies for increasing parental involvement in transition planning?
7. Describe three ways parental attitudes can hinder the career/vocational process.
8. How does the concept of "dignity of risk" apply to students with disabilities?
9. Be able to list and give examples of ways parents can become positively included in the career/vocational process.

## Lecture 6: Adult Services Study Guide

1. Briefly describe the possible roles (services) of each of the following agencies in the transition process:
  - a. Vocational Rehabilitation
  - b. Community Rehabilitation Agencies
  - c. Mental Health (DD Services)
  - d. Community Colleges
  - e. Department of Social Services
  - f. Social Security Administration
  - g. Employment Security Commission
  - h. WIA Services
  - i. Four Year Colleges and Universities
2. Know the Rehabilitation Act legislation of 1986 and 1992. Pay careful attention to the definition of supported employment and "presumption of capability."
3. What is the "Order of Selection" and how does it impact transition?
4. List and describe the types of existing Community Rehabilitation Agencies.
5. Describe three ways that Community Rehabilitation Agencies secure work.
6. How does sheltered work differ from supported employment in terms of place-train versus train-place, etc.?
7. What is "Single Portal?" How does it work?
8. What is CAP-MR/DD?
9. Describe the types of residential options.
10. Describe the supported employment models.
11. What does a job coach do?
12. What must be included in an IWRP?
13. What is Compensatory Education?
14. What is a PASS and an IRWE?

## Lecture 7: Community-Based Training Study Guide

1. Describe each type of vocational community-based training options.
2. What issues should be considered when locating community-based training sites?
3. Describe three methods for staffing community-based training.
4. Describe two strategies for grouping students for community-based training.
5. Know the things a teacher must remember when placing students in non-paid community-based vocational training sites. (Pay careful attention to the information in the Dear Colleague letter).
6. What are the Fair Labor Standards Act guidelines for:
  - a. Volunteering
  - b. Child Labor Laws (ages 14 - 15 - 16 - 17)
  - c. WECEPs
  - d. Paid Vocational Training Experiences

## **Lecture 8: Business and Industry Study Guide**

1. What can schools learn from business and industry?
2. What can businesses contribute to schools?
3. What five areas are covered by the Americans With Disabilities Act?
4. What do the Americans With Disabilities Act and the Rehabilitation Act of 1973 say about employing persons with disabilities?
5. How might you go about contacting employers?
6. What are some common fears that employers have about hiring individuals with disabilities?
7. What does the research say about individuals with disabilities who are employed in the areas of: safety, attendance, performance, job stability, job satisfaction.
8. What are some common obstacles to employment for individuals with disabilities?
9. Name 3 companies that have a national policy on hiring persons with disabilities.

## Lecture 9: Vocational Evaluation Study Guide

1. What information is typically gathered during the vocational evaluation process?
2. List and describe the four components of traditional vocational evaluation.
3. List and describe the types of clinical assessment.
4. Be able to give an example of an interest and an aptitude test.
5. What is work adjustment?
6. Why is job site evaluation important?
7. Which "traditional" vocational evaluation strategies are hands-on/real-life?
8. How can students with disabilities get a vocational evaluation?
9. What steps are involved when referring a student for a formal vocational assessment/evaluation?

## Comprehensive Final Study Guide

The final examination will focus on one (1) case study of a young person with a disability. In order to prepare for answering the questions related to this case study, you should focus on the following areas:

1. The parts of a transition component of an IEP.
2. Writing post-school outcomes (goals).
3. Developing appropriate transition activities.
4. Student and parent involvement in the transition process.
5. School personnel involvement in the transition process.
6. Adult service agency involvement and the services they provide.
7. Traditional and non-traditional methods for obtaining vocational information through assessment and evaluation.
8. Preparing students for transition in grades K - 8 (paying careful attention to Career Education and the LCCE).

Dear Colleague:

The goal of this course, "***Community-Based Methods***", is to explore community-based curricula and instructional methods associated with transition and supported employment services, supports, and outcomes for individuals with disabilities and their families. The goal is to be accomplished through a semester-long course using assigned course readings, guest speakers, lectures, applied in-class activities, quizzes, and practicum experiences with professionals employed in agencies providing community-based transition and supported employment services.

This packet includes a comprehensive set of materials designed to support the teaching of this course. The packet is divided into three sections: (1) a sample course syllabus/course assignments; (2) sample lecture notes and PowerPoint slides; and (3) a sample test bank.



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1. Syllabus –Community Based Training-class outline

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2. Transition Overview notes and lecture guide

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3. Transition Best practices

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4. Participation and Choice of Students and Parents

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5. Transition Needs Assessment and Program Evaluation

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6. Community Based Training procedures  
Winston Salem- Community Based Training Manual.

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7. Finding Jobs for Young People

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8. North Carolina Occupational Course of Study

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9. Self-Determination

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10. Teaching Self-Determination

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11. Sample Quizzes

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**Sample Outline and Course Syllabus**

**COMMUNITY-BASED INSTRUCTION**

- 1.8** Grade of "I". I follow the policy stated in the UNCC faculty handbook which reads as follows:

"The grade of "I" is assigned at the discretion of the instructor when a student who is otherwise passing has not, due to circumstances beyond is/her control; completed all the work in the course. The missing work must be completed during the next semester (fall or spring) in residence, but not later than 12 months after the term in which the "I" was assigned, whichever comes first. If the "I" is not removed during the specified time, a grade of "F", "U", or "N" as appropriate is automatically assigned. The grade of "I" cannot be removed by enrolling again in the same course." (p. 12-13)

## **2.0** Assignments

- 2.1** Transition Needs Assessment. (in-class) Each student will review the NC Transition Needs assessments (in class) to determine the critical components to quality evaluation and planning in transition. Students will discuss the instrument with their peers. Students will be given a profile of a school system with its current stage of involvement in transition planning and programming. Given the profile, students will, 1) evaluate the school system, 2) recommend areas of program development for the school systems and, 3) recommend one additional model program component to expand the transition options within the school system (i.e., community based training, parent/guardian involvement, job shadowing, functional curriculum).
- 2.2** Transition Needs Assessment. Students will review a local school system to determine its current stage of involvement in transition planning and programming. Given the profile, students will, 1) review the school system and its transition programming using the NC Needs Assessment , 2) recommend areas of program development for the school system and, 3) recommend one additional model program component to expand the transition options within the school systems (i.e, community based training, parent/guardian involvement, job shadowing, functional curriculum).
- 2.3** Transition Services Portfolio (Peer Review). One assignment (Transition Needs Assessment) will result in a permanent product that will be collected and saved to allow each student to develop a Transition Services Portfolio. Before the assignment is graded each student will have the opportunity to review and provide feedback to each other prior to receiving a final grade on assignment. This process should facilitate networking among professionals in the field as well as in class.

## **2.4 Skill Acquisition-Community Based Training**

**2.4.1** Each student will complete a job analysis and task analysis to develop an individual intervention plan and skill acquisition for a student.

**2.4.2** Each student will do a class presentation of the device or modification utilized or developed.

**2.5 Class Participation.** Students will work individually and in small groups to complete and share activities during class.

## **3.0 Textbook**

Wehman Paul (1996), Life Beyond the Classroom, Second Edition, Brookes Publishing

Students will also be expected to read supplementary handouts, selected articles, and sections from the North Carolina Transitional Manual.

## **4.0 Course Schedule**

## **Materials**

### **Class Introduction**

Introduction, Student Info, Outcome Forms, Course Overview

Wehman  
Chapter 1

### **Class Lecture 1**

Defining Transition-Transition Overview

Wehman  
Chapter 2

### **Class Lecture 2 Transition Best Practices**

Key Components in Transition Models  
Best Practices  
Review of Transition Needs Surveys  
Working with parents

Wehman  
Chapter 3

### **Class -Quiz**

**Quiz 1**

**Class 5- Lecture 4.**

Participation and Choice of Students and Parents

Handouts

**Class Lecture 5 Transition Needs Assessment**

Handouts

**Class Lecture 6 Community Based Training Procedures**

Winston-Salem

NC Needs Assessment

Wehman  
Chapter 4

**Class Lecture 7 Finding Jobs for Young People**

Wehman  
Chapter 6

**Class Lecture 8 North Carolina Occupational Diploma**

Handouts

**Class Lecture 9 Self-Determination**

Handouts

NC Assessment Due for peer review

**Class Lecture 10 Teaching Self-Determination**

NC Assessment Due with Quiz

Student presentations or lectures around strategies and accommodations for specific disability groups. Can be used for final class lectures along with student presentations

**5.0 Academic Integrity Statement**

Students have the responsibility to know and observe the requirements of The UNCC Code of Student Academic Integrity (Catalog p. 24-25). This code forbids fabrication or falsification of information, multiple submission of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements of permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic

evaluations in this course include a judgement that the student's work is free from academic dishonesty of any type; and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be expelled from UNCC. The normal penalty for a first offence is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

**6.0 Course Attendance Policy**

Each instructor determines the attendance regulations for his or her own class. Students are expected to attend punctually all scheduled sessions in the courses for which they are registered and are responsible for completing the work from all of the class meetings.

Absences from class may be excused by the instructor for personal illness, religious holidays, or participating as an authorized University representative in an out-of-town event. Whenever possible, students are expected to seek the permission of the instructor prior to the absences.

**First Class Meeting.** A student who does not attend the first scheduled meeting of a course may be disenrolled from the course by the department offering the course.

APPENDIX A

**JOB SITE TRAINING ASSIGNMENT**

*Select one of the following (1, 2). Remember to describe any adaptations developed.*

**1) INDIVIDUAL INTERVENTION PLAN & IMPLEMENTATION OF SKILL ACQUISITION**

Develop and implement an intervention plan for an individual who has not demonstrated acquisition of key task (essential function) necessary for the employment position. Or an individual who needs to acquire or demonstrated a

skill. This activity should include the following for the task/s which have not been mastered or need to be mastered:

- (a) a detailed written plan; (b) a job analysis showing where this essential (task) fits into the work day; (c) a task analysis of the essential skill to be
- (d) the reinforcement (support needs) to be used and information on how it was for this individual; (e) the schedule of reinforcement including fading and (f)
- (f) data recording sheets and graphic displays.

OR

2) *PRODUCTION TRAINING*

Develop and implement an intervention plan to increase a worker's production rate on a task on which he/she is functioning below standards. This activity should include the following for the task/s which is being performed at an unacceptable rate:

- (a) Job analysis, task analysis and baseline production rate data; (b) employer's standard and description of how you determined this rate; (c) a detailed written intervention plan; (d) the reinforcement to be used and information on how it was selected for this individual; (e) the schedule of reinforcement; (f) a description of how the reinforcer(s) is/are to be faded; and (g) data recording sheets and graphic displays.

APPENDIX B

**SMALL GROUP EXERCISE**

Curriculum Evaluation Questions

1. Summarize the overriding or overarching philosophy of the curriculum in three to five sentences.
2. Does the curriculum take into account participation of the student, and the family in planning and implementation? If so, how? Do you think the method is effective and thorough?

3. What type of outcomes (school and adulthood) does the curriculum assume for students? Do you think it's appropriate (Why/why not?)
4. Does the curriculum address the skills that are necessary for achieving the outcomes (from #3)?
5. Does it address the necessary settings?
6. Is the curriculum age appropriate?
7. How does the curriculum address friendships and/or social skills necessary for friendships?
8. Does the curriculum have an appropriate evaluation/assessment component for yearly (or more frequent) updates of plans?
9. Does the curriculum have an ecological inventory?
10. Does the curriculum have a process for prioritizing goals and activities?
11. Is the curriculum user friendly?
12. Would you adopt this curriculum? Why or why not? To whom would you recommend this curriculum?



## Transition Overview

### Slide 1

#### **Expanding Transition in NC**

Capacity building (maximizing resource usage) in Secondary Special Education, Vocational Rehabilitation, and Adult Services remains problematic as each area works at increasing its own ability to provide services, while interacting with the delivery systems, parents, families, advocacy organizations, and the private sector (Clark, 1992).

Halpern (1992) suggests that four conditions need to exist in order for a capacity-building transition model to work:

1. The model must be based on a rationale for change and a set of standards for guiding change.(IDEA)
2. The model must be implemented through a structured set of procedures that are agreed upon by the critical stakeholders.
3. The model must be supported by training and technical assistance to those who are responsible for implementing individual and collaborative elements of the model.(DPI)
4. The model must be documented using concise and effective communication procedures so that program efforts can be replicated elsewhere and ensure continual capacity building.

### Slide 2

Philosophically educators and adult service providers have been preparing students for adult roles long before the formalization of the concept of transition services. Traditional IEP's have been designed for a maximum of one year. With Transition services guiding the implementation of the planning tool the plan becomes oriented towards life after high school. This step into futures planning requires continual planning on the part of parents, students and professionals within the school and adult service agencies in each community and school district.

The traditional lack of futures planning at the school level further complicates transition to an often hostile and non understanding adult world. Discrimination, unfavorable attitudes, and physical barriers are still encountered by individuals with disabilities in the workplace and adult world. A lack of comprehensive transition planning makes acclimation to the adult world even more difficult for young adults with disabilities.

### Slide 3

#### **NLTS (Wagner, 1991)**

Additionally longitudinal research indicates that a majority of Americans with disabilities are either unemployed or underemployed.

**Slide 4**

**Slide 5**

Even though discrimination still exists in the adult segment of the population, current transition and employment initiatives come at a time when Americans indicate many positive attitudes towards integrating individuals with disabilities into all aspects of adult life.

**Slide 6**

**Employment Benefits**

The Importance of being employed can not be understated. Working provides wages and benefits that lead to greater independence, increased self-esteem, and a new network of friends and social networks(Wehman, 1995)

**Slide 7**

**Guiding principles for transition implementation**

**Slide 8**

**Division on Career Development and Transition**

The Division on Career Development and Transition identifies Transition “as a change in status from behaving primarily as a student to assuming emergent adult roles in the community. These roles include, employment, participating in post secondary education, maintaining a home, becoming appropriately involved in the community and experiencing satisfactory personal and social relationships.”

**Slide 9**

CEC notes that transition is a community effort, that becomes stronger and more effective the earlier it is initiated. They also emphasize the importance of the concept of career development.

**Slide 10**

**Transition Process requires**

Dunn (1996) emphasizes that operationalizing transition methods requires a thorough understanding of the process, knowledge of what steps need to be done, and the skills to implement the needed activities to make it happen.

### **Slide 11**

#### **Dunn (1996)**

Dunn also notes the evolution of transition, from the original concept of working with those more significantly involved, to the latest research which indicates that people with milder disabilities are falling through the cracks.

Transition teams should not overlook the concept that life before graduation and life after graduation may differ greatly for each student.

### **Slide 12**

#### **Life before graduation**

For example, life for students before graduation is largely focused on school. School personnel have been trained and have learned how to interact and relate to students with disabilities, which in the best systems have become part of the culture of the school.

### **Slide 13**

#### **Life after graduation**

On the other hand, after graduation, students often find themselves in a system that does not necessarily advocate for them and many times students find themselves in a system that is still adjusting to the very basic concept of disability. Without the right planning and support this can make the likelihood of success more difficult, and the challenges for individuals with disabilities greater, adding more obstacles and greater stress as students transition into the adult world. (Examples-Students unable to identify needed accommodations, students having trouble socializing on job, employers not making any concessions on the job.)

## **TRANSITION SERVICES AS DEFINED BY IDEA**

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

### **Slide 14**

#### **Transition IDEA, 92**

(a)...a coordinated set of activities for a student, designed within an outcome-oriented process, that promotes movement from school to post-school activities,

### **Slide 15**

#### **Transition IDEA, 92**

including postsecondary education,

Vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.

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

(1) Be based upon the individual students needs, taking into account the students preferences and interests.

### **Slide 16**

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

(i) Instruction:

(ii) Community experiences:

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

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

These requirements make it clear that transition services should be provided across a variety of locations, include community-based experiences, and based on individual need.

### **Transition and IDEA, 1997**

IDEA of 1997, has a similar definition of transition, although there are some minor changes in the wording of the law.

The term "transition services" means a "coordinated set" of activities for a student, with a disability that is designed within an outcome oriented, process, that promotes movement from school to post-school activities including postsecondary education, vocational training, integrated employment, continuing and adult education, adult services, independent living, or community participation.(same as '92)

The coordinated set of activities are based on the student's needs, taking into account the student's preferences and interests.

The coordinated set of activities includes instruction, related services, community experiences, the development of employment and other post-school objectives, and when appropriate, acquisition of daily living skills and functional evaluation Section 602).

### **Transition Statement and the IEP-97 changes**

#### **Slide 17**

#### **IDEA 97**

(I) Beginning at age 14, and updated annually, a statement of the transition service needs of the child..... that focuses on the child's course of study.....

**Slide 18**

- (II) Beginning at age 16(or younger if deemed appropriate) a statement of needed Transition service for the child, including, when appropriate, a statement of the interagency responsibilities and any needed linkages.
  
- (III) Beginning at least one year before the child reaches the age of majority under state law, a statement that the child has been informed of his rights under this title that will transfer to the child on reaching the age of majority.

**Broadening Curriculum and Staff Roles**

Traditionally, educators have focused upon providing academic services. Now, with transition services, schools must expand the scope of their services to include instructional and educational experiences that will occur outside of the school building and that are related to much broader outcomes: employment, independent living, post-secondary education, and community participation. And "as the definition of the secondary-level special education classroom expands beyond the physical structure of the school building to include the entire community, personnel capabilities must be expanded as well" (DeStefano & Wermuth, 1992, p. 543).

What does that mean for school personnel?

- a. New Roles-
  
- b. New Information-
  
- c. New Skills-
  
- d. New Collaboration-
  - 1. families
  - 2. employers
  - 3. agencies
  - 4. [
  - 5. ]
  - 6. [
  - 7.
  
- e. New Curriculum-

Staff must learn new roles, new information, and new skills; they must be able to collaborate with "families, employers, community-based service providers, and other key players in the post-school environments encountered by students with disabilities" (p. 544). Clearly, these changes – expanding curriculum and expanding the competencies of staff -- present schools with a significant challenge, particularly in this time of budget shortages and academically-oriented educational reform.

Within North Carolina the growth of supportive documentation to create and refine transition programs have been created through the Department of Public Instruction, in conjunction with Technical assistance supported through the North Carolina Transition project. Products include the Cumberland County Faces Curriculum, The Buncombe County Curriculum and the Cleveland County TASSEL Curriculum.

Progress continues to be made while at the same time progress still needs to be made. A report by the National Council on Disabilities (2000) indicates that every state in the US was out of compliance with IDEA to some degree. In addition they found that objective criteria for enforcing IDEA from the Department of Education has not been made known to the states or the Public, this puts most of the burden of responsibility on the states and local districts to develop compliance monitoring. The report of the NCD indicates "very clearly that children with disabilities continue to be denied their civil rights on a National Basis under the federal law, IDEA. In North Carolina the efforts of both the staff at the local levels and through efforts at the state level will help ensure that North Carolina provides the best education to all citizens.

### **Pick a Disability Discussion**

#### **Slide 19**

#### **Pick a Disability (Windmills training, 1981)**

The California Commission on Disabilities uses this exercise to discuss the attitudes surrounding people with disabilities in the employment community.

#### **Slide 20**

#### **Pick a disability**

- 1) If you had to have a disability when you woke up tomorrow, and you can only choose from the four disabilities listed, which disability would you choose. Give the students a quick minute, and then note how many people choose each disability.
- 2) Go around the room and have each student give 3-4 reasons they choose the disability and one of the things that they can accomplish with the disability such as work, play, family marriage. Generate a list of functional options (positive statements)

**Slide 21**

**Pick a disability you would not want to live with ever**

- 3) Part two of the exercise is for the students to choose one disability from the list that they could remove. If they had to live with a disability picked from a hat but could remove one disability out of the hat before they choose a disability, which disability would they choose to never have to deal with. Note which students choose each disability and then generate a list of (limitations) reasons they fear or have trouble with the disability. (Negative Statements)

Read each generated list and ask what the descriptors are on each list. This can lead into a discussion about the culture of disability and how the community does not have flagrant prejudice but simply might not understand the potential of disability.

Additional discussion can be drawn from the four remaining overheads.

## **Expanding Transition in NC Possibilities-capacity building**

- ∩ **Based on rational for change and set of standards (IDEA)**
- ∩ **implemented through structure**
- ∩ **supported by training and technical assistance(DPI, Universities)**
- ∩ **components should be replicable (Halpern, 1992)**

∩ It is important to acknowledge that many special education teachers, counselors, and many adult service personnel were in the business of preparing individuals for the realities of adult life long before the current emphasis on transition began (Gerber, 1997).

## **NLTS (Wagner, 1991)**

- ∩ **Two thirds of Americans with disabilities between the ages of 16 and 64 are not working**
- ∩ **The overwhelming majority of unemployed people with disabilities in the working age population want to work**

∩ **A substantial minority of people with disabilities who are employed or willing and able confront discrimination, unfavorable attitudes and physical barriers in the workplace (Gerber, 1997)**



∂ Americans also indicated that their attitudes toward integrating people with disabilities into all aspects of life, are more positive than ever before.....(Gerber, 1997)

- ### Employment benefits
- 1) Independence and community presence
  - 2) Self-esteem and dignity
  - 3) Social networks

- ### Guiding principles for Transition Implementation
- ∂ Self determination
  - ∂ Student choice
  - ∂ Person centered planning

### Division on Career Development and Transition

∂ Transition refers to a change in status from behaving primarily as a student to assuming emergent adult roles in the community. These roles include employment, participating in post-secondary education, maintaining, a home, becoming appropriately involved in the community and experiencing satisfactory personal and social relationships.

∩ The process of enhancing transition involves the participation and coordination of school programs, adult service agencies, and natural supports with the community. The foundations for transition should be laid during the elementary and middle school years, guided by the broad concept of career development.

### Transition Process requires

- A) a thorough understanding of the process
  - B) knowledge of what must be done
  - C) a variety of skills to implement needed transition activities successfully.
- ∩ -It is essential that all efforts lead to the acquisition of skills, knowledge services, and or/supports- to deal with the demands of adulthood

### Dunn (1996)

- ∩ Early work in transition focused on transition activities for individuals with more extensive needs
- ∩ Common assumptions were that students with mild disabilities were able to make the transition to adult life with minimal difficulty.-emphasis should be placed on academics

### Life before graduation

- ∩ School personnel have learned how to think about students with disabilities
- ∩ How to interact with them
- ∩ How to relate to them
- ∩ Disability is part of the culture of schools (Gerber, 1997)

## Life after Graduation

- ∩ Workplace culture is still adjusting to the concept of disability
- ∩ Invisibility of mild disabilities causes the nature of some disabilities to appear abstract (Gerber, 1997)

## Transition IDEA, 92

- (a) ...a coordinated set of activities for a student, designed within an outcome-oriented process, that promotes movement from school to post-school activities,

## Transition,IDEA, 92

- ∩ Including postsecondary education,
- ∩ Vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation.

- ∩ and when appropriate, acquisition of daily living skills and functional evaluation

## IDEA, 97

### ⌚ Transition Statement and the IEP

⌚ (I) Beginning at age 14, and updated annually, a statement of the transition service needs of the child..... that focuses on the child's course of study.....

⌚ Beginning at age 16 (or younger if deemed appropriate) a statement of needed Transition service for the child

## Pick a disability(Windmills training, 1981)15-30 minutes

- ⌚ Blindness
- ⌚ Cerebral palsy/mental retardation
- ⌚ Mental illness
- ⌚ Paraplegia



## Pick a disability

- ⌚ Pick from the list of four disabilities a disabilities you believe you would be able to adjust to if you woke up with a disability
- ⌚ List four reasons you why you choose to live with the disability you choose/what can you do with this disability

### Pick A Disability you would not want to live with ever

- o Blindness
- o Paraplegia
- o Mental Illness
- o Cerebral Palsy/mental retardation
- o list four reasons you would choose not to have to live with this disability

### Workplace culture


- o Employment settings may not include an advocate for individuals with disabilities or a professional, charged with determining how disability interferes with overall functioning(Gerber, 1997)

### Employment success


- o It is not only the internal processes, such as desire and goal setting, that fostered success, it was interfacing those attributes with the right "fit", creative problem solving, and using social support systems

### Gaps

- o The research in employment does not go much further than job entry



∞ The life span of work encompasses unpredictable peaks and valleys. People with disabilities are as likely to experience these times as are their nondisabled peers, but the degree of challenge and the resulting duration of stress can be far greater. They may be always at risk in employment, no matter how long they have been working (Gerber, 1997)



∞ Managers always seek a prospective employee who will contribute the most to the corporate mission whether nondisabled or disabled

∞ They have a right to hire someone who is not disabled-the person most qualified for the job

# **Key Components in Transition Planning**

## **Best Practices**

(Wehman, 1996)

### **Life Beyond the Classroom**

#### **Chapter 3**

1. Why is it important to involve communities in transition planning and program development?
2. How can transition programs prepare supports as well as people?
3. Identify ways in which business can be involved in transition program development and individualized transition planning?
4. What would you consider three of the most important prerequisites to Active Listening?

#### **Slide 1**

##### **Martin Luther King (1959)**

- “We can choose either to walk the road of human brotherhood or to travel the low road...History has thrust upon our generation an indescribably important destiny...If America is to remain a first-class nation, it cannot have a second-class citizenship.”

Transition to full community participation becomes a major step towards full citizenship for people with disabilities allowing them to live and work as contributing members. Without a comprehensive transition process in our schools then many of our students will remain as second-class citizens as adults.

#### **Slide 2**

##### **Key Transition Models**

- Madeline Will-1984
  - Bridge to work
- Andrew Halpern-1985
  - Bridge to community

A discussion of the conceptual models of transition from school to community should include the earliest concepts developed by Madeline Will and Andrew Halpern. Will's model, known as the bridges model, defined transition in 1984 as a process encompassing

a broad array of services and experiences that leads to employment. This bridge to employment was defined as being completed with three levels of “interventions”. The first required no special services other than those generic services already in place, with employment the resulting outcome. The next level was time-limited services for an individual, with employment as the outcome. The third was on-going services that may need to continue in order for the individual to maintain employment after graduation.

In 1985 Halpern expanded upon Will’s model of bridges to employment to a bridge to community (adjustment), which included employment as one of three equally important outcomes. The other two outcomes include independent living skills (residential) and social and interpersonal skills. Halpern’s revision of Will’s model continues to remain as an underpinning and conceptual framework for transition models to date.

### **Slide 3**

#### **Key Strategies to Transition**

- Students and families must take an active role
- Each Student should Graduate into Paid Community Employment
- Students should learn Functional Community-Referenced Skills during their educational years.

Wehman identifies key strategies that can make transition for youth with disabilities more effective and efficient.

Professionals in their zeal to establish effective programming can easily overlook the obvious, that parents and students need to be at the helm of the planning process. Professionals continue to overlook the needs of the student and the family in developing educational goals and plans for the student, instead of with the student and family.

For students that wish to be employed or for those that employment may be a viable option, the availability of employment programs should be priority. Without the development of comprehensive work programs, the goal of full employment for individuals that wish to work will remain illusive.

### **Slide 4**

#### **Learning environments**

- 1. Designed to meet needs
- 2. Fluid and flexible
- 3. Provides activities for growth
- 4. Teaches about cooperation
- 5. Psychologically safe
- 6. Growth in environment is open-ended
- 7. Human interaction is rich and positive



Schools and programs that do not offer community based programs, and community based work opportunities continue to allow students to complete their high school education unprepared to compete for jobs and to become self-sufficient members of their community. When developing community-based learning environments, Crawford, Bowdine and Høglund, (1993) discuss aspects of a quality-learning environment. These seven concepts should be considered when developing, utilizing or evaluating community-based learning environments:

1. The learning environment is designed to provide all individuals with opportunities to meet their needs. The teacher proactively constructs, modifies, redesigns and redefines the environment toward this end.
2. The learning environment is fluid and flexible in design so that the learner and or the teacher may adjust it to fit the learner, rather than expecting that the learner's behavior and needs be modified to fit the environment and or teacher.
3. The learning environment provides activities that allow the individual to learn about themselves; -to assess their strengths and weaknesses, their goals and aspirations, their beliefs and values, their successes and failures, and their thoughts and feeling. Positive things occur.
4. The learning environment is designed to foster, encourage and demand, and utilize cooperation.
5. The learning environment is psychologically safe for the learner and the teacher. Both must feel free to take risks, explore, inquire, create, discover, think, value, share, receive, give, succeed, and fail.
6. The learning environment is open-ended. Questioning is values perhaps more than answering. Knowledge is viewed as dynamic, not static.
7. Though the physical and material resources may be modest, the learning environment is rich in human resources. The learning environment is the sum of the human interactions within-no more no less. Activities are designed to maximize use of all these human resources.

These concepts need to be considered; even though community designed programs will differ from site to site and location to location. Just as the environmental and psychological design of the classroom is important in either facilitating learning or impeding learning, the dynamics of the community and the classroom can either facilitate or impede the learning process.

#### **Slide 5**

#### **Key Strategies to Transition**

- Prepare Supports, Not People
- Connections with Adult Services and funding Agencies are completed.
- Transition Results in approved Quality of Life

Services should be aimed at preparing supports as well as people.

By teaching community-referenced skills we can maximize individuals independence and plan for the level of supports needed to help them achieve and maintain an independent lifestyle.

All necessary connections with adult services and funding agencies should be established and maintained.

Without comprehensive interagency planning, transition services that do exist will remain fragmented, preventing a smooth transition and comprehensive use of community services.

Transition planning should result in employment experiences that, allows each student to attain an Improved Quality of Life.

Without career planning and development being forged in the high school years, little or low expectations for success will continue to plague, school professionals, adult service agencies and both the students and their families.

### **Slide 6**

#### **Key Strategies to Transition**

- Role of Business in transition planning needs to be considered
- Participation needs to include Post-Secondary Institutions

The business needs and resource needs of local and state employment opportunities need to be considered in designing any community based training program. Without input from local employers a community-based program may overlook the actual needs of the community while designing traditional vocational programs that might not match the labor needs of the community.

Many institutions of higher learning remain ill prepared to adequately serve individuals with disabilities. A lack of tutors, readers, and personal assistants exists on a national level (Wehman, 1996).

Connecting students to the community requires open channels between the student and the community. Wehman describes activities and linkages to consider keeping channels open and increase the effectiveness of transition planning. These should be considered as part of the connecting activities within your school and aligned with STN and WIA.

### **Slide 7**

**Connection Building-** Can you think of some activities that you currently do or that can be done to increase the effectiveness of local transition programs? (Take 5 minutes to generate a list of known activities or possible activities to strengthen transition such as employers speaker bureau or factory/business tours)

- Connecting activities

Activities that Build connections Between Students and Employers: (Wehman 1996)

- Advisory Committees
- Speakers Bureau
- Linkages across General and Special Education

- College and University Interns
- Links with Community Colleges
- Mentor Programs
- Career Fairs

## **Slide 8**

### **Koehler's Model**

- Student Development
- Student Planning
- Family Involvement
- Interagency collaboration
- Program Structure

Kohler (1996) discusses taxonomy for transition planning based on student development, family involvement, student focused planning, interagency collaboration, and programs structures, while Grayson suggest a model specifically for student s with learning disabilities.

Koehler's model includes:

1. Student development which should include
  - Life skills instruction
  - Employment skills instruction
  - Career and vocational curricula
  - Structured work experience
  - Vocational Assessment
  - Accommodations and support
2. Student focused planning
  - IDP/ITP development
  - Student participation, accommodation, and planning strategies
3. Family Involvement
  - Family training
  - Family Involvement
  - Family empowerment strategies
4. Interagency collaboration
  - Individual-level planning
  - Inter-organizational framework
  - Organization-level planning
  - Human resource development
5. Program Structure and Attributes
  - Program Philosophy
  - Program Policy
  - Strategic Planning
  - Program Evaluation

**Slide 9**

**Transition Models (Grayson et al, 1997) learning disabilities**

- Basic skills instruction
- Survival skills instruction
- Academic strategies
- Job related skills

The authors recommend that many of the instructional strategies should be relevant, functional and provided in formats that students may encounter while working and that strategies should be used to provide such training as part of the job placement experience.

**Slide 10**

**Transition Models**

- Subject matter must be integrated with vocational education
- Vocational education and community-based experiences need to start by 9th grade
- Special educators must be involved in job placement and follow-along
- Re-entry must be an option

“By explicitly bringing the vocational relevance of content area subjects into the forefront of instruction, the curriculum will better enable students to make the connection between activities they are working on in school to future employment and how these activities apply to the real world”.

In-school mainstream vocational education courses and community-based job experiences that begin in the ninth grade and continue throughout high school.

Research indicates that the early vocational experience decreases dropout rates for students at risk as well as students with learning disabilities (Wagner 1991).

Special educators must be responsible for job placement training and follow along, before a student leaves high school.

**Slide 11**

**Transition Problems**

- Transition was not conducted with linkages to future environments. Secondary schools conducted and developed ITP's with out making contact to future environments on behalf of children with disabilities.
- 64 percent of parents indicated that their children needed support from the educational system or the community after graduation.

The authors feel that special education teachers need the skill and flexibility to provide comprehensive community training programs that include community follow along for at least two years after graduation.

Multiple high school re-entry points must be accessible to all youths with learning disabilities, whether they have graduated from high school or not, until they reach the age of 21.

Academic and vocational instruction needs to be available to students with disabilities as a safety net for students. Until an educational system's legal responsibility ends, special education professionals need to be in a position to assist students after leaving school if needed.

#### Status Report (NLTS-study)

- For most students with learning disabilities, transition planning was conducted unilaterally by the secondary schools; non-school personnel were not involved in the development of ITP's and secondary schools were not making contact with employers, adult service agencies, or post-secondary institutions on behalf of students with disabilities. (Wagner, et al, 1993)

#### Status Report

- NLTS study – Parents were asked to report whether their sons or daughters with disabilities who had been out of secondary school for up to five years had received or needed services since exiting school. Sixty four percent indicated that their children needed services.

#### Slide 12

#### Best Practices

- Planning is individualized
- Vocational Preparation
- Job seeking and Placement
- Academic Remediation
- Curriculum (Functional)
- Understanding disability

#### Vocational Preparation

Identified considerations in model programs for students with mild disabilities.

- Vocational preparation and career development have been the primary focus of transition planning. Because many adolescents with LD hold unrealistic or uninformed career aspirations, vocational counseling is essential. Vocational training programs should reflect the diversity in occupational roles filled by individuals with out disabilities.

#### Job Seeking and Placement

- A key component of many transition programs for students with mild disabilities are a structured job-seeking curriculum. Activities may include resume development, filling out applications, etc.
- Some individuals may not need assistance with securing employment, while others may need supported job searching or direct job placement.

#### Follow-up and Support Services

- Many professionals believe that individuals with mild disabilities do not need transition services or if they do, require only time-limited services. Currently follow-up after school is extremely limited.

#### Academic Remediation and Support

- The majority of individuals with mild disabilities do not attend college; thus continued remediation and tutoring may not be appropriate. (18% enroll in post-secondary)

#### High School Curriculum

- The curriculum focus can vary, depending on the heterogeneity of the population as well as on numerous related factors, such as background experiences, support systems, and motivation. Functional and relevant goals need to incorporate for all students.

### **Slide 13**

#### **Best practices**

- Self-determination
- Transition from Post-Secondary
- Problem solving

#### Understanding Ones Disability

- The importance of understanding one's disability is particularly relevant to students with learning disabilities. A clear and realistic understanding is instrumental in empowering an individual in many areas of his or her life.

#### Self-Determination

- Self-determination, which is emerging as a priority in the transition movement, refers to individuals with learning disabilities learning to make choices; set goals regarding their lives and the services they receive, and initiate actions to achieve those goals.

#### Transition from Post-Secondary Settings

- Ryan and price suggest that one of the new frontiers of transition training for individuals with learning disabilities is the successful transition from post-

secondary settings into the real world. Most efforts are aimed at getting students into post-secondary education or employment and not beyond.

#### Problem Solving

- Individuals with learning disabilities have difficulties with problem solving. Inadequate problem solving skills can affect all facets of an individual's life-personal-social-and vocational.

#### **Slide 14**

### **Best Practices to Increase Family Participation**

- Family education
  - trusting relationships
  - Getting to know family
  - Determining relevant information
  - Restructuring roles

Activities, concepts, and skills that can increase family participation:

#### Family Education

- The outdated concept of family education as a one way transmission process from the all knowing expert or professional is insulting to families and creates a major barrier to family as recipients of professional's decision.
- The concept of family education as a reciprocal process, one of exchanging information, pooling resources and learning from each other is the key to facilitate effective family-professional partnerships and promoting positive transition outcomes for students and families (Turnball and Turnball, 1990). This can be accomplished through the following four components of a reciprocal family professional relationship.

#### Establishing Trusting Relationships

- Accept families unconditionally
  - Listen with empathy
  - Share information/resources
- Focus on family identified issues
- Actively and reliably respond to families
- Be available
- Meet in user-friendly locations

#### Getting to Know the Families

- Stage One
  - Listening is considered by many to be one of the most essential ingredients in an effective relationship. As defined by Webster listening is, "to make a conscious effort to hear; attend closely so as to hear".

Gordon (1990) defined active listening as an activity that promotes problem solving and encourages acceptance and expression of thought and feeling.

Six Attitudinal Pre-requisites for Active Listening:

1. Wanting to hear what the other person has to say
2. Wanting to help
3. Being able to genuinely accept the other person's feelings
4. Trusting the other person's capacity
5. Realizing and accepting that feelings are transitory, you need not fear them.

Determine relevant information

1. Professionals need to determine what information is important to obtain through discussions with families – family characteristics, family interactions, family functions, home-school communications preferences.
2. A profile of their priorities and dreams
  - Future planning
  - Circles of support
3. Restructuring Roles
  - Open-ended dialogue may promote relaxation of traditional family and professional roles. Harry (1992) presented the argument that family-professional discourse is the way the educational system structures interactions and communications. “Thus the legalistic framing of family and professional roles tends to ritualize interactions.”
  - Dittmer (1996) indicates “collaborative relationships in which professionals and families combine their knowledge and skills to plan and intervene often produce the best results for the child and the family.” Thus collaborative relationships and barriers that structure our interactions with parents.
  - Collaborative Relationships
  - Increase Professional Flexibility

### **Slide 15**

#### **Considerations in Increasing Family Participation**

- Exchanging Information
  - Content
  - Methods
  - Formats

A lack of knowledge/facts leads to disempowerment. Parental intimidation and discomfort have been identified as reasons for lower parental involvement. Quality aspects of exchanging information should consider the content of information, the methods in which information is delivered and the quality of the information.



## Content

- Existing and potential services
- Opportunities for involvement observation
- Opportunities to observe programs
- Basic facts

## Methods

- Newsletters
- Log Books
- Progress notes

## Formats

- Quality of the information
- Is it two-way?
- Is it understandable?
- Is it useable?

### **Martin Luther King (1959)**

- **"We can choose either to walk the road of human brotherhood or to travel the low road...History has thrust upon our generation an indescribably important destiny...If America is to remain a first-class nation, it cannot have a second-class citizenship."**

1

### **Key Transition Models**

- **Madeline Will-1984**
  - bridge to work
- **Andrew Halpern-1985**
  - bridge to community

2

### **Key Strategies to Transition**

- **Students and families must take an active role**
- **Each Student should Graduate into Paid Community Employment**
- **Students should learn Functional Community-Referenced Skills during their educational years.**

3

### **Learning Environments**

- **1. Designed to meet needs**
- **2. Fluid and flexible**
- **3. Provides activities for growth**
- **4. Teaches about cooperation**
- **5. Psychologically safe**
- **6. Growth in environment is open-ended**
- **7. Human interaction is rich and positive**

4

## **Key Strategies to Transition**

- **Prepare Supports, Not People**
- **Connections with Adult Services and funding Agencies are completed.**
- **Transition Results in approved Quality of Life**

5

## **Key Strategies to Transition**

- **Role of Business in transition planning needs to be considered**
- **Participation needs to include Post-Secondary Institutions**

6

**Connection Building-** Can you think of some activities that you currently do or that can be done to increase the effectiveness of local transition programs? (take 5 minutes to generate a list of known activities or possible activities to strengthen transition such as employers speaker bureau or factory/business tours)

- **Connecting activities**      • **Connecting activities**

7

## **Koehler's Model**

- **Student Development**
- **Student Planning**
- **Family Involvement**
- **Interagency collaboration**
- **Program Structure**

8

### **Transition Models (Grayson et al, 1997) learning disabilities**

- **Basic skills instruction**
- **Survival skills instruction**
- **Academic strategies**
- **Job related skills**

9

### **Transition Models**

- **Subject matter must be integrated with vocational education**
- **Vocational education and community-based experiences need to start by 9th grade**
- **Special educators must be involved in job placement and follow-along**
- **Re-entry must be an option**

10

### **Transition Problems**

- **Transition was not conducted with linkages to future environments. Secondary schools conducted and developed ITP's with out making contact to future environments on behalf of children with disabilities.**
- **64 percent of parents indicated that their children needed support from the educational system or the community after graduation.**

11

### **Best Practices**

- **Planning is individualized**
- **Vocational Preparation**
- **Job seeking and placement**
- **Follow up and support**
- **Academic Remediation**
- **Curriculum (Functional)**
- **Understanding disability**

12

## **Best Practices**

- **Self-determination**
- **Transition from Post-Secondary**
- **Problem solving**

13

## **Best Practices to Increase Family Participation**

- **Family education**
  - **trusting relationships**
  - **getting to know family**
  - **determining relevant information**
  - **restructuring roles**

14

## **Best Practices to Increase Family Participation**

- **Exchanging Information**
  - **content**
  - **methods**
  - **formats**

15

## Participation and Choice of Students and Parents

### Slide 1

#### Family Involvement

- Why don't parents show up?
  - Identify situations in which parent interactions have frustrated or blocked you.
  - Take a few minutes (15) in small groups. Develop two lists. First, Identify at least 5 reasons parents miss or don't attend IEP/ITP meetings. Second, generate two-five situations (scenario's) that have frustrated you, when dealing with families.
1. Reasons parents may not be involved in Transition Planning
  2. Roles of parents in Transition Process
  3. Raising parent expectations
  4. Historical roles of parents in Service Development
  5. Solutions to involving parents in process

Exercise 1 – List reasons that they may not attend yearly IEP/ITP planning meetings. Share reasons or events that have confused you when dealing with parents. In small groups of 3-4 students list five reasons you think parents might not attend a planning meeting. Then generate a list of 5 ways parents have upset you or may upset you as a professional in the planning process (ie coming to an IEP meeting and not participating). Then we will generate a class list of scenarios to discuss in the second half of class.

Wehman (1996) describes how parents and students input into the IEP and the ITP remain the most critical variable in holistic planning for individuals with disabilities. Student and family input remains largely under utilized and for the most part a missing component of planning. In essence, plans are devised by professionals around existing programs with little parent or student input.

### Slide 2

#### What should the Roles of Parents and Students in Transition be?

(Wehman 1996)

- 1. Parents and students need to be aware of IEP and how a ITP should be developed
- 2. Families need to follow up to insure plan is being implemented
- 3. Parents and students need to be able to judge (determine) if plan is working and resulting in forward movement.

Wehman (1996) describes what he feels are the roles of the parents and students in the transition planning process.

1. Parents and children must speak for themselves.

In order to accomplish this parents must be aware of the IEP and how the IEP and Individualized Transition Planning can be developed. One source of information for parents and students is planning for Life after High School (1993) available through the Exceptional Children's Assistance Center,

Located in North Davidson, North Carolina Booklets, information packets can be distributed, many parents may have access to the information, but without some type of assistance, may not be able to fully use it to their benefit and to the benefit of their student.

2. Follow up to insure the Transition Plan is being implemented. Wehman emphasizes that student and parents need to develop rapport and positive communication patterns with educational professionals. It becomes even more imperative for professionals to make themselves available and to determine how to best include parents and students in the decision making and planning process.
3. Hold School Systems Accountable (ie, ensuring plan is implemented). Parents need to be able to determine if the plan is working. Families need to assist the professionals in developing transition goals and then insure that schools are held accountable for the plans that are developed. Wehman emphasizes that a lack of involvement on the part of the family and students leads to high post-school unemployment rates and many unsuccessful transitions. Parents and especially the student need to be vested in their own plan.

### **Slide 3**

#### **Helping Students voice Transition needs (Wehman, 1995)**

- Parents can help students practice goal identification
- Teachers can include instructional objectives to build self advocacy skills and self determination skills
- Develop stronger student involvement through peer and support groups.

How can students voice transition needs?

Wehman points out that it is important to provide special assistance to students to include them in transition planning and teach them to take charge of their future.

One issue addressed is parents helping their sons and daughters build confidence through practicing goal identification and developing goals for transition. (What job do you want? What skills do you need to get a job? Resume, work experience...) He suggests that parents might also follow-through to see if students concerns are being addressed.

Second, he addresses the concept of teaching students their rights and beginning to develop more IEP objectives that reflect learning self-advocacy skills.

Thirdly, Wehman emphasizes that support group and peer groups can also help develop stronger student involvement. (Job clubs, support clubs, school groups, peer mentors).

Support groups and school groups help demonstrate the success of individuals with disabilities. These steps can help raise awareness and expectations of all individuals with disabilities.

### **Slide 4**

#### **Raising Expectations**

- It is absolute critical to show that young people with disabilities can work competitively and for a substantial duration of time

Two Recommendations:

- Showing students can work
- developing support systems

Expectations for people with disabilities remains low and many parents are unaware of transition programs for their youth.

Two basic steps are identified in raising expectations. One is simply showing or demonstrating that individuals with disabilities are capable of working competitively and over time. This can be accomplished through community work programs that have been successful, providing access to national programs or local programs that are involved in or knowledgeable about community employment and supported employment programs. Presentations by local supported employment providers and VR can also be very helpful. The second step is insuring that support systems and programs are in place so that a gap does not occur when jobs are lost. This will depend on programs in your area, programs you have developed, and adult service linkages that you have established.

Some measure (Transition Activities) that will help raise expectations (Wehman) and increase involvement include:

Encourage parents to plan optimistically for the employment of their son or daughter, beginning at the elementary school level.

\*Educate parents about community programs available (leisure recreation, city programs, YMCA)

\*Educate parents about employment alternatives available in the local community and describes those that should be available.

\*Provide parents with information about model programs across the U.S.

\*Orient families to relevant community agencies. (Residential, advocacy).

\*Give examples of home activities that promote employability.

Parents can:

-Make sure that transition education is part of the IEP starting as early as possible.

-Actively support teacher's efforts to provide training in a variety of community-based sites.

-Know what training programs and employment options are available for their youth.

-Involve parents in the design and implementation of transition planning as early as possible.

## **Slide 5**

### **Four levels of Parents Involvement**

1. Support and care

2. Support and care and attends IEP, input and advocacy

3. Attends IEP, input, advocacy member of personal's future planning team

4. Attends IEP, input advocacy plus leadership in local or state level planning to address transition services.

Parent's level of involvement can vary from family to family. It can be as basic as the family providing the basic supports such as food and shelter, and care, but may not provide any input into their education. The next level involves parents that are involved in their son's/daughter's education to the point that they attend IEP meetings and have an



interest in quality services. The next level would be a parent that takes an active interest, attend meetings, lead planning, and actively help the child and the school plan for their child's future. The fourth level is someone that actively helps their child, while becoming involved with the political process at either the local or state level as an advocate, actively addressing transition issues for the community or state. Parents will likely have many questions about employment programs. As professionals you do not want to be caught off guard. You should address parent-centered questions as you design your community programs.

#### **Slide 6**

#### **Parental concerns**

(Wehman, 1996)

- When will my child be ready?
- How will my child get there?
- What impact will employment training have? (i.e.-SSI)  
What are liability issues?
- What are the hours?

\*When will my child be ready?

\*How will my child get there?

\*What impact will employment training have?

\*What impact will there be on SSI?

\*What impact will employment have on the family? (Wehman, 1996).

Program and personal information needs to be available to answer the myriad of questions that parents may have. Questions such as transportation, liability issues, scheduling, all need to be worked out ahead of time, and presented before any community-based work programs or in-school work programs are initiated. Although adulthood involves many transitions the transition to work marks the most visible transition for parents and students. Many parents may remain skeptical of employment programs and community based programs, as they become available across the state. By closely documenting student's success in school based work opportunities and experiences, the move to community work experiences will become smoother. The more systematic the program and opportunities the easier it will become to address parent's questions and concerns about the transition process.

#### **Slide 7**

#### **What have the Historic Roles of Family Members been?**

- Problem source
- Advocates
- Service Recipient
- Service developer

- Learner and teacher
- Decision maker
- Family member

One of the oldest and most devastating roles for family members is that of being considered the source or the cause of their child's problem. This can become even more difficult when we as professionals blame or indict the parents as the cause of their children's problems. Family blaming continues to plague the family professional relationship (Turnball and Turnball, 1990). The imposition or assumption of this role by family members can result in several barriers to family professional relationships. These barriers can include resentment, low self-esteem, lack of trust, and defensiveness. These barriers result in poor relationships between families and parents, which can result in parents not attending meetings and conferences, scheduled by school personnel.

#### Advocate (organizational member)-Service Developer

There is an overlap of these two roles. This historic role grew out of the lack of community services and local lack of response to the needs of individuals with disabilities. Some of the earliest parent-supported programs grew out of churches and church basements to evolve into day programming and sheltered workshops. Parent groups have had a monumental impact on services delivery and political advocacy, and have been the catalysts behind educational legislation, as well as improvement of standards for treatment in institutions and community agencies.

This development of advocacy efforts led to increased awareness of service needs and the development of services to fit those needs. These were spearheaded by groups such as the ARC.

#### Service Recipient

Many professionals feel by their training and through the culture of their profession that they know best. Many professionals continue to make decisions for their clients and students, rather than with them. This results from concepts such as the traditional roles of the doctor-patient relationship, the student-teacher relationship, instead of partnerships.

#### Learner and Teacher

Many parents attend training through organizations such as the National Alliance for Mental Illness (NAMI, Journey of Hope Program), or ECAC (Transition Training), learning, and in turn sharing their expertise with other parents.

#### Decision Makers – legal requirements

This role was legally established with the passage of P.L. 94-142, the Education for All Handicapped Children Act. As the child grows, however, there is a need to balance the role of family members as decision makers with the need for the young individual with a disability to become his or her own primary decision maker.

#### **Slide 8**

#### **Legal requirements**

- P.L. 94-142 was the first law to require that family members be part of the evaluation and planning process that determines the IEP.
- With the passage of 94-142, family members became entitled to procedural and informational safeguards that protect their decision-making rights.

P.L. 99-457 (1986) expanded the original law to require services to be planned around the family as well as the child. This law emphasizes that actual participation varies from family to family, and professionals should act on the assumption that family members are both important in the planning of services for their children, as their influence is likely to be important through out the life span of an individual. This legislation resulted in the Individual Family Service Plan being developed around this concept.

Other than primary caregivers it is important for professionals to remember that parents and families are responsible for ongoing social support, are important in instilling work and employment supports to students, mediators between the school and the student and many times act in the roles as defacto case manager. Therefore the importance of a solid relationship between the schools and the parents cannot be overstated.

#### Family Member

Parents are the main support for most students with disabilities, providing food, shelter, and emotional support.

Barriers and problems to family involvement can be plentiful, additional barriers, include family dynamics and family transitions that become difficult for the family to deal with. The transition from the school to adult service can become a real obstacle for parents and students. With the skills of self-advocacy and self-determination, the crossover from a system that seeks some family involvement to a system that appears unstable, unfriendly, and many times unavailable and unknown to parents, becomes less of a challenge. In addition, many families are facing more immediate issues and circumstance, and often choose to deal with the immediate and not have to deal with the illusive future of transition planning.

#### **Slide 9**

**Five Roles Family Members can Assume in Transition** (Irvin, Thorin and Singer, 1993)

- Provider of ongoing social support
- mediator of connections between the service provider and the adult child
- developer of work-support behaviors
- De facto case manager
- Primary Caregiver

Irvin identifies additional roles that the family can take in the transition process, lets discuss each of these briefly. Can we identify other roles parent and families may take?

### **Slide 10**

#### **Involvement**

Despite mandated family participation in the special education process, current research indicates that families tend to be passively involved or submissive participants. (Turnball & Turnball, 1990)

### **Slide 11**

#### **Barriers to Involvement**

- Knowledge,
- Personal resources,
- Authority and power,
- Communication.

Knowledge, personal resources, authority and power, and communication factors can all play a part in the involvement or lack of involvement of families in the transition process. Many families, especially minority families lack critical knowledge about their rights, the processes, and the procedures of the educational systems and the policies that affect them and their children. This combined with a lack of personal resources, such as a lack of child care or arranging transportation or making arrangements to get off work, can further hamper their involvement. In addition this can be further limited by the perceptions of the professionals they are dealing with, the amount of family involvement encouraged in past educational decisions, confusion related to expectations, limited or inaccessible opportunities to participate, stresses experienced, by the family, and the typical re-negotiations and changing dynamics of the parent-child-family relationship.

### **Slide 12 & 13**

#### **Principles of family-school collaboration (removing the barriers)**

1. Families are a constant in children's lives and must be equal partners in all decisions affecting the child's educational program.
2. Family involvement includes a wide range of family structures.
3. Diversity and individual differences among people are to be valued and respected.
4. All families have strength and coping skills that can be identified and enhanced.
5. Families are sources of wisdom and knowledge about their children

### **Slide 14**

"Transition from childhood to adulthood is a complex, stressful time for individuals with disabilities and their families. As their children age, these families are faced with conflicting needs, uncertain services, and the emotions related to letting the child grow up. It is up to teachers and other service providers to support and facilitate the actions that families and children must take to help them move forward during this life cycle.(Maxwell, Pogoloff, and Thomas, 1996)

**Slide 15**

**Family Involvement-Solutions-overcoming barriers**

**Part 2**

- Back in your small group, list strategies to accommodate or provide a solution to the barriers generated on your initial list.
- Class discussion of solutions.

## Family Involvement Part 1-

- Why don't parents show up?
- Identify situations in which parent interactions have frustrated or blocked you.
- Take a few minutes (15) in small groups. Develop two lists. First, Identify at least 5 reasons parents miss or don't attend IEP/ITP meetings. Second, Generate two-five situations (scenario's) that have frustrated you, when dealing with family's.

10/24/2001

1

## What Should the Roles of Parents and Students in Transition be (Wehman 1996)

- 1. Parents and students need to be aware of IEP and how a ITP should be developed
- 2. Families need to follow up to insure plan is being implemented
- 3. Parents and students need to be able to judge (determine) if plan is working and resulting in forward movement

10/24/2001

2

## Helping Students Voice Transition Needs (Wehman, 1995)

- Parents can help students practice goal identification
- Teachers can include instructional objectives to build self advocacy skills and self determination skills
- Develop stronger student involvement through peer and support groups.

10/24/2001

3

## Raising Expectations

- It is absolute critical to show that young people with disabilities can work competitively and for a substantial duration of time

### Two Recommendations

- Showing students can work
- developing support systems

10/24/2001

4

BEST COPY AVAILABLE

### Four Levels of Parents Involvement

- 1.Support and care
- 2.Support and care and attends IEP, input and advocacy
- 3.Attends IEP, input, advocacy member of persons future planning team
- 4.Attends IEP, input advocacy plus leadership in local or state level planning to address transition services

10/24/2001

5

### Parental Concerns (Wehman, 1996)

- When will my child be ready?
- How will my child get there?
- What impact will employment training have? (i.e.-SSI)  
What are liability issues?
- What are the hours?

10/24/2001

6

### What Have the Historic Roles of Family Members Been?

- Problem source
- Advocates
- Service Recipient
- Service developer
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- Family member

10/24/2001

7

### Legal Requirements

- P.L. 94-142 was the first law to require that family members be part of the evaluation and planning process that determines the IEP.
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10/24/2001

8

### Five Roles Family Members can Assume in Transition (Irvin, Thorin and Singer, 1993)

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10/24/2001

9

### Involvement

- Despite mandated family participation in the special education process, current research indicates that families tend to be passively involved or submissive participants.

10/24/2001

10

### Barriers to Involvement

- Knowledge,
- personal resources,
- authority and power,
- and communication.

10/24/2001

11

### Principles of Family-School Collaboration (removing the barriers)

- 1. Families are a constant in children's lives and must be equal partners in all decisions affecting the child's educational program
- 2. Family involvement includes a wide range of family structures.
- 3. Diversity and individual differences among people are to be valued and respected.

10/24/2001

12



## Principles of Family-School Collaboration

- 4. All families have strength and coping skills that can be identified and enhanced.
- 5. Families are sources of wisdom and knowledge about their children

10/24/2001

13

- "Transition from childhood to adulthood is a complex, stressful time for individuals with disabilities and their families. As their children age, these families are faced with conflicting needs, uncertain services, and the emotions related to letting the child grow up. It is up to teachers and other service providers to support and facilitate the actions that families and children must take to help them move forward during this life cycle.(Maxwell, Pogoloff, and Thomas, 1996)

10/24/2001

14

## Family Involvement -Solutions-overcoming barriers Part 2

- Back in your small group, list strategies to accommodate or provide a solution to the barriers generated on your initial list.
- Class discussion of solutions

10/24/2001

15

**Slide 1**

**Transition Needs Assessment**

This session will review the TASSEL Transition Needs Assessment for Secondary Education and will allow you the opportunity to review a system in class to become more familiar with the assessment and its format.

Vocational Assessment  
Informal Instruments  
Standardized tests  
Situational assessments  
    Domestic/Daily Living  
    Recreation  
    Community Living-personal social

**Slide 2**

**Curriculum and Instruction**

Skill Areas  
Instructional Environments

**Slide 3**

**Vocational Training**

Training Alternatives  
Development  
Supervision

**Slide 4**

**Interagency Collaboration**

Agencies Referrals  
Interagency Planning

**Slide 5**

**Parent Guardian Involvement**


Types Training  
    - Information/Marketing  
    - Information Delivery

Training Providers

**Slide 6**


**Post-School Follow up**

Procedures  
Information collected  
Who collects  
Data Feedback  
    ITP's  
Post School Outcomes




**Transition Needs Assessment**  
Vocational Assessment

- ◆ Informal Instruments
- ◆ Standardized tests
- ◆ Situational assessments
  - Domestic/Daily Living
  - Recreation
  - Community Living-personal social




**Curriculum and Instruction**

- ◆ Skill Areas
- ◆ Instructional Environments




**Vocational Training**

- ◆ Training Alternatives
- ◆ Development
- ◆ Supervision




**Interagency Collaboration**

- ◆ Agencies Referrals
- ◆ Interagency Planning




### Parent Guardian Involvement

- ◆ Types Training
  - Information/Marketing
  - Information Delivery
- ◆ Training Providers




### Post-School Follow up

- ◆ Procedures
- ◆ Information collected
- ◆ Who collects
- ◆ Data Feedback




### ITP's

- ◆ Post School Outcomes
- ◆ Responsibilities
- ◆ Objectives Activities




### Student Involvement

- ◆ Training Self Determination
- ◆ Student Involvement ITP




### In-service Teacher Training

- ◆ Scheduling
- ◆ ITP training
- ◆ Materials




### Demographics

- ◆ Size
- ◆ Industry Resources
- ◆ Training site possibilities
- ◆ Advocacy resources




### School System Demographics

- ◆ Students
- ◆ Scheduling
- ◆ Drop out rate



### Additional

- ◆ IEP
- ◆ CP plan



**Review of High School Situation**  
**– Central Piedmont**

- ◆ What general recommendations can you make?
- ◆ What else would you like/need to know?
- ◆ What training would you recommend?

Needs Assessment-Planning Assignment.

Group planning members

_____	_____
_____	_____

---

Clearasmud County is a rural area of North Carolina. There is one high school in the county (Central Peidmont) that serves 1600 students in grades 9-12. There are 100 identified exceptional students enrolled in the district's high schools and four EC teachers. Sixty of these students are not enrolled in the standard course of study (most are classified EMD or TMD). The remaining exceptional students are pursuing a North Carolina High School Diploma (most are classified as LD with some Visually Impaired, Hearing-Impaired and Orthopedic ally Handicapped). 980 students are enrolled in the Career Development program. The special population coordinator is very interested in initiating the occupational course of study within the school but has little time for the endeavor on her own, as she is actively involved in resource support and classroom accommodations. Some of the resources in the area include a local racetrack, a strip shopping mall (Walmart, Subway, dry cleaners, Eckard's Drug, and a Food Lion). There are a number of other businesses around each of the high schools including Doctor's and Lawyer's offices and a couple of service stations.

The High School conducts vocational assessments using standardized instruments. . Students are sometimes sent to Vocational Rehabilitation for assessments. Situational Assessments that are done include in-school worksites and in-school vocational classes. The High Schools currently provide students 16 and older with transition components of the their IEP's.

You have just been hired as the new Transition Coordinator for the district with the assignment to set up a transition program. Upon an immediate overview of the present services, you discover that the students not in the standard course of study are involved in little, if any functional curriculum. None of the special education students receive any formal community-based training.

Little interagency coordination or minimal transition planning exists. Individual transition plans are just another form completed each year to stay within the mandate of the law. You realize you have a challenge lying in front of you.

The first thing you do is decide to develop a plan for implementing quality transition services, at the high schools to present to your colleagues, for a changeover to develop community based instruction.

Develop your plan considering the following questions and using the TASSEL Transition Needs Assessment to assist you in guiding your program recommendations. As a group you will present to the newly formed transition committee to begin next month in Clearasmud County. Using information from the Needs Assessment, and the following questions to guide you, develop recommendations for next months transition meeting.

1) What general recommendations can you make concerning?

1. Vocational Assessment/Evaluations

2. Curriculum and Instruction

3. Vocational Training

4. Parent Guardian Involvement

5. Student Involvement



- 2) What can be done about increasing interagency involvement and coordination? How will other agencies be involved?
  
- 3) How can the effectiveness of transition planning be increased? Who are the main players and what are their roles in the planning process?
  
- 4) What “problems” do you foresee in developing job sites in the community? How will you deal with these issues?
  
- 5) What would your top 4 priorities be for this years goals for 2000-2001

# TRANSITION NEEDS ASSESSMENT: SECONDARY EDUCATION EVALUATION PROGRAM

Program:

Please Note: The following Needs Assessment is to be used to evaluate your current transition program for student with disabilities. This self-assessment should be completed prior to developing and implementation any action plan. Completing this assessment will help you to determine areas of greatest needs in your district.

With permission, this information has been adapted from the Connecticut Interagency Task Force in Collaboration with the Connecticut Department of Education, Bureau of Special Education and Pupil Services, the Connecticut Department of Human Resource, Bureau of Rehabilitation Services, and the Developing an Effective County InterAgency Transition Consortium, The New Jersey Partnership for Transition from School To Adult Life for Youth with Disabilities, The University Affiliated Program of New Jersey University of Medicine and Dentistry of New Jersey, Robert Wood Johnson Medical School.

# Vocational Assessment/Evaluation

1. Identify the Vocational Assessment components utilized in your transition planning process  
(Check all that apply.)

A. Informal instruments

Student surveys

Parent surveys

Teacher surveys

Other

B. Standardized tests (Please list instruments.)

Career interest inventories \_\_\_\_\_

Aptitude \_\_\_\_\_

Achievement \_\_\_\_\_

Intelligence \_\_\_\_\_

Values/Maturity \_\_\_\_\_

Work Samples \_\_\_\_\_

Other \_\_\_\_\_

C. Situational Assessment (Check all that apply.)

In-school work sites

In-School vocational classes

Community-based vocational sites

Other

2. Do you utilize formal/informal assessment procedures to determine students skills/needs in the following domains?

**Domestic**                      Circle one    Yes    No

If yes, specify procedures \_\_\_\_\_

**Recreation/Leisure**                      Circle one    Yes    No

If yes, specify procedures \_\_\_\_\_

**Community Living**                      *Circle one*      Yes      No  
If yes, specify procedures \_\_\_\_\_

---

3. Specify individual(s) responsible for coordinating information to be utilized in transition program planning. *(Check all that apply.)*
- Transition Coordinator
  - Guidance
  - Work-Study Coordinator
  - Administrator
  - Classroom teacher
  - Other
4. Do you send students for vocational evaluations at a Rehabilitation facility?  
*Circle one*      Often      Sometimes      Never

## Summary Statement

1. How would you rate your programs overall degree of development in the component of *Vocational Assessment*?  
*Circle one* Beginning In Progress Fully Developed
2. Does your program need to develop comprehensive **Vocational Assessment procedures** for students?  
*Circle one*      Yes      No

How would you rate your need for further program development in this area?

*Circle one*      1                      2                      3                      4                      5  
                    Low                                      Moderate                                      High  
                    Priority                                      Priority                                      Priority

## II. Curriculum and Instruction

- I Identify skills training included in program curriculum. *(Check all that apply.)*
- Career awareness
  - Job seeking/keeping skills
  - Independent living skills (money management, banking, budgeting, housing, etc.)

- \_ Personal living skills (hygiene, cooking, laundry, etc.)
- \_ Social Skills development
- \_ Transportation training
- \_ Recreation/Leisure
- \_ Organizational/Problem solving skills development/Learning strategie
- \_ Self-Advocacy

2. Identify the instructional environment where these activities take place  
(Check till that apply.)

- \_ Integrated within regular education classes (vocational, academic)
- \_ Self-contained classes
- \_ Community-based

## Summary Statement

How would you rate your programs overall degree of development in the component of  
**Curriculum and Instruction?**

*Circle One* Beginning In Progress Fully Developed

Does your program need to increase/improve Curriculum offerings related to transitional planning? *Circle one* Yes No

3. How would you rate your need for further program development in this area?

<i>Circle one</i>	1	2	3	4	5
	Low		Moderate		High
	Priority		Priority		Priority

## III. Vocational Training

1. Do students participate in vocational training activities?

*Circle one* Yes No

2. At what age are these activities initiated?

What vocational training alternatives are utilized in your program?

(Check all that apply)

- \_ Simulated vocational training in classroom

- In-school job sites
- Career Internships in the community

Work-Study

Supported Employment Preparation

Enclaves

Work Crews

Individual Placements

- Adult Service job training programs (ARC's, Easter Seals, etc.)
- Other

4 Who develops job sites and matches students to the job? *(Check all that apply.)*

5 Who supervises on the job site?

6 Identify community-based job training sites utilized in your programs. *(Check all that apply.)*

Food Service

Agriculture

Retail

Maintenance

Industry

Clerical

Hotel/Hospitality

Other

Who supervises students on the job site? \_\_\_\_\_

Transition Coordinator

Work-Study Coordinator

Classroom Teacher

Job Coach

Other

## Summary Statement

1. How would you rate your programs overall degree of development in the component of Vocational Training?

Circle One Beginning In Progress Fully Developed

2. Does your program need to increase/improve Vocational offerings related to transitional planning?

Circle one Yes No

How would you rate your need for further program development in this area?

Circle one 1 2 3 4 5  
Low Moderate High  
Priority Priority Priority

## IV. Interagency Collaboration

1. Does your school district have written policies and procedures for making adult agency referrals?

Circle one Yes No

2. Identify the agencies your students with disabilities are referred to. (Check- all that apply.)

- Division of Vocational Rehabilitation (DVRS)
- Division of Developmental Disabilities (DDD)
- Division of Mental Health Services (DMHS)
- Commission for the Blind and Visually Impaired (CBVI)
- Division of the Deaf and Hard of Hearing (DDHH)
- None

Other (College support programs ARC's, Job Service, Job training programs, recreation leisure programs, etc.)

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3. Who initiates and follows-through on agency referrals? \_\_\_\_\_

4. At what age/grade is the referral process begun? \_\_\_\_\_

5. Identify adult agencies that attend PPT meeting and degree of attendance.

DVRS	Often	Sometimes	Never
DDD	Often	Sometimes	Never
DMES	Often	Sometimes	Never
CBVI	Often	Sometimes	Never
DDHH	Often	Sometimes	Never

6. Does your school district participate in a local, community interagency planning team? Circle one Yes No

Other Often Sometimes Never \_\_\_\_\_

yes, identify agencies represented on this team. (Check all that apply.)

DVRS

DDD

DMHS

CBVI

Religious organizations

Social Services agencies

Other

## Summary Statement

1. How would you rate your programs overall degree of development in the component of **Interagency Collaboration?**

Circle one Beginning In Progress Fully Developed

2. Does your program need to develop procedures for assessing adult service providers/ agencies?

Circle one Yes No

3. How would you rate your need for further program development in this area?

Circle one 1 2 3 4 5  
Low Priority Moderate High Priority  
Priority

## V- Parent/Guardian Involvement

1. Identify the adult services agencies including in information/Training for parents/guardians (Check all that apply.)

Division of Vocational Rehabilitation Services (DVRS)

Division of Developmental Disabilities (DDD)

Division of Mental Health Services (DMHS)

Commission for the Blind and Visually Impaired ~CBVI)

Division of the Deaf and Hard of Hearing (DDHH)

Other

Identify the resources included in information disseminated to parents/guardians

(Check all that apply.)

Parent support groups (SPAN, ARC's, etc.)



Office of Protection and Advocacy (P &A)

Learning Resource Centers (LRCs)

Community resources

Group Homes

Other

3. Identify the topics included in information made available to parents/guardians. (*Check all that apply.*)

SSI, SSDI

Guardianship, wills

Self-advocacy

Other

4. Identify the means by which information is provided to parents/guardians. (*Check all that apply.*)

Open houses

Telephone contact

Topical meetings

Newsletters, brochures

Individual parent meetings

Community visits

PPT meetings

Training sessions

Other

5. Who conducts parent/guardian training and/or information dissemination?

Division of the Deaf and Hard of Hearing (DDHH)

Other

## ● Summary Statement

1. How would you rate your programs overall degree of development in the component of **Parent/Guardian Involvement?**  
*Circle one* Beginning    In Progress    Fully Developed
2. Does your program need to develop strategies to increase **Parental Involvement?** *Circle one* Yes No
3. How would you rate your need for further program development in this area?  
*Circle one*      1                  2                  3                  4                  5  
                    Low                      Moderate                      High  
                    Priority                      Priority                      Priority

## VI. Follow-Up Procedures

1. Do formal follow-up procedures exist for special education program graduates?  
*Circle one* Yes    No

2. Identify procedures utilized.

●  Student questionnaire-mailed

Student questionnaire-telephone contact

Parent questionnaire-mailed

Parent questionnaire- telephone contact

Vocational Rehabilitation data

Vocational Education data

3. Identify information collected. (*Check all that apply.*)  
 Employment status (Job placement, wages, benefits, etc.)

Community living arrangements

Access to community opportunities

Friends

Transportation Utilized

●  Contact with adult service agencies and providers

Need for additional assistance, information

Other

Who collects this information? \_\_\_\_\_

5. When is the information collected? *(Check one.)*

Immediately following graduation

Within three months

Within one year

Multiple year follow-up

6. How is this data utilized in program evaluation and planning?

## Summary Statement

How would you rate your programs overall degree of development in the component of Follow-Up Procedures?

*Circle one* Beginning In          Progress          Fully Developed

2. Does your program need to develop procedures for students graduating from special education?

*Circle one* Yes                                  No

How would you rate your need for further program development in this area?

*Circle one*          1                  2                  3                  4                  5  
Low                                  Moderate                                  High

## Individual Transition Plans (ITPS)

I          Does your ITP include long term goals in the following areas? *(Check all that apply.)*

Employment

Postsecondary Training or Education

Independent Living

Community Participation

2. Does the format of your ITP include sections to list the following? (*Check all that apply*)

Objectives/Activities to reach the long term goal

Persons/Agencies responsible for implementing activities

Timelines

Progress on activities (Evaluation, Monitoring)

3. Look at the "Person/Agency" section of your ITP. Is "Special Education" responsible for the majority of activities, or are they shared among other school personnel (vocational, guidance, social workers, psychologists, regular educators, etc.), families, students, and adult service agencies and providers?

*Circle one*    SPED has majority    Shared

4. Which of the following components are included as objectives/activities on your students ITP? (*Check all that apply.*)

Vocational Assessment

Career Exploration

Vocational Training (In-school)

Vocational Training (Community)

Job seeking/Keeping Skills

Rehabilitation Engineering

Independent Living Skills

Personal Living Skills (Hygiene, Cooking, Laundry, etc.)

Social Skill Development

Self-Advocacy Training

Recreation/Leisure

Participation of Adult Service Agencies

Transportation Training

Referral to Adult Service

Activities to include/increase student/family participation

Provision for follow-up after Graduation

Participation of Adult Service Providers (ARC's, Advocacy Groups, JTPA, Colleges Support Programs, etc.)

TECH PREP

School-to-Work Opportunities

5. Review the activities on your ITP. Knowing the age of the students that these were developed for, can you categorize them in the following sequence of transition planning activities. (*Check all that apply.*)

Information Gathering and Exploration

Active Preparation and Experiences

Appropriate Links and Placement with Adult Service Agencies and Providers

Employment and Adult Outcomes

Using the above categories as an age-related sequence (14-21), are your activities appropriate to the sequential development and provision of transition related activities?

*Circle One*    Yes    No

6. Does your ITP and IEP support each other? For example, if you listed "Participate in Career Exploration Activities" or "Increase Independent Living Skills" or "Provide for Recreation/Leisure Opportunities" on your ITP, can you look in your IEP for the specific goals and objectives to accomplish this activity?

*Circle One* Yes    No

7. Was your ITP written prior to the Planning and Placement Team meeting, or was it developed as a group process, with parents, students, and other relevant parties participating?

*Circle One* Yes    No

8. Do you hold a formal "Exit Planning" meeting prior to student's exit from his/her secondary special education program?

*Circle One* Yes    No

9. Do you develop a written "Exit Plan" that: (*Check all that apply.*)

Summarizes the student's present status in the area of Employment, Independent Living and Community Participation

Specifies the need for ongoing services/supports

Defines the roles/responsibilities and commitments of Adult Service Agencies and Providers

Provides the students with a list of contacts so they may easily access support services if needed.

**Summary Statement**

1 How would you rate your programs overall degree of development in the component of **Individual Transition Plans?**

*Circle one* Beginning In Progress Fully Developed

2. Does your program need to develop more comprehensive **Transition Plans?**

*Circle One* Yes No

3. How would you rate your need for further program development in this area?

*Circle one*      1                      2                      3                      4                      5  
                    Low                      Moderate                      High  
                    Priority                      Priority                      Priority

## VIII. Student Involvement

I Has the student received training and/or information on?

- Choice/decision making
- Self-advocacy
- Self-advocacy organizations
- Client assistance program (CAP) within die VR system

2. How was the student involved in the development of his or her ITP?

- Initiated all of the goals, objectives, and service plans
- Collaborated on developing all of the goals, objectives, and service plans
- Agreed to all of the goals, objectives, and service plans
- Goals, objectives, and service plans were developed with input from family, and/or friends, and/or advocates-who knows the likes and dislikes of the individual student
- Goals, objectives, and service plans were developed primarily by school and adult service professionals

3. Did the curriculum for the student's last 4 to 5 years in school include information and/or experiences, with which to make informed choices regarding the following?

- Post-school life outcomes (where to live, work, recreate, and with whom to form relationships)
- Type of services to achieve post-school outcomes
- Specific service providers to achieve post-school outcomes

4. If the student is not competent in English, what measures are taken to communicate both expressively and receptively with the student during his/her ITP planning process?

- Language interpreter was used (foreign language or ASL)
- Augmentative communication device was used
- Person who is familiar with the signals of the student was present

Person who can speak to the behavioral indications of the student was present to speak on behalf of the student

5. Evidence that students with severe disabilities are given access to either (1) supported employment programs, and/or (2) assistive technology services before being denied access to rehabilitation services.

Referral to a local supported employment program was made for consumer assessment for SE services

Vocational evaluation was conducted by an individual with knowledge and expertise of assistive technology

Student did not want to use supported employment services

Student did not want assistive technology services

Supported employment services were desired but not available

Assistive technology services were desired but not available

## Summary Statement

1. How would you rate your programs overall degree of development in the **component of Student Involvement?**

Circle one    Beginning            In Progress            Fully Developed

2. Does your program need to develop more comprehensive **Student Involvement?**

Circle one    Yes            No

4. How would you rate your need for further program development in this area?

Circle one    1            2            3            4            5  
                  Low                    Moderate                    High  
                  Priority                    Priority                    Priority

## X. Inservice Teacher Training

I      Are there regularly scheduled transition in-services provided for staff?

- Yes
- Annually
- Semiannual
- Quarterly
- No

Has staff been provided in-service on writing transition plans?

Circle one Yes No

3. Please check materials/activities/curriculum used to train staff.

\_Local/state/national workshops

\_Videos

\_Community-based curricula

\_Manuals

\_Subject specific consultation

\_Handouts

\_Other

4. How is in-service training characterized?

*Circle one* Mandatory      Elective

5. Do participants receive credit for in-service?

\_Continuing education

\_Renewal

\_Other

## Summary Statement

1. How would you rate your programs overall degree of development in the component of **In-Service/Teacher Training?**

*Circle one* Beginning      In Progress      Fully Developed



2. Does your program need to develop more comprehensive **In-Service/Teacher Training**?  
*Circle One* Yes No

3. How would you rate your need for further program development in this area?

*Circle one*      1                      2                      3                      4                      5  
                         Low                                      Moderate                                      High  
                         Priority                                      Priority                                      Priority

## **X. Community Demographics**

1. Size of location (*check one*).

Small town: less 2,200

Town or small city: 2,500-49,999

Large city: 50,000-249,000

Major city: 250,000 or more

2. What is the major industry in the area? (*Check all that apply.*)

Food Service

Hospitals

Churches

Childcare

Retail

Supermarkets

Maintenance

Government Facilities

Industry

Hotel/Hospitality

Full Service Gas Stations

Clerical

Other

Identify possible community-based vocational training sites. (*Check all that apply.*)

Food Service

- Hospitals
- Churches
- Childcare
- Agriculture/Horticulture
- Warehouse
- Retail
- Supermarkets
- Maintenance
- Government Facilities
- Industry
- Hotel/Hospitality
- Full Service Gas Stations
- Clerical
- Other

6. Identify possible community-based recreation sites. *(Check all that apply.)*

- City/County Park and Recreation
- YMCA/YWCAs
- Fitness Centers
- Church Leagues
- Other

What advocacy agencies/groups are located in the area?

- ARC
- People First
- Exceptional Children Assistance Center
- LDA
- Other

Are there Community Colleges/Universities/Post Secondary opportunities within your community?

Circle one Yes No

What type of public transportation is available in the area? (Check all that apply.)

Taxi

Bus

Special Transportation

Car Pool Services

## **XI School System Demographic Data**

1. Total number of students in school system. \_\_\_\_\_

2. Percentage of females. \_\_\_\_\_ %

3. Percentage of males. \_\_\_\_\_ %

4. Percentage of minority students. \_\_\_\_\_ %

5. Percentage of students who are:

African –American \_\_\_\_\_ %

Hispanic \_\_\_\_\_ %

Native American \_\_\_\_\_ %

Caucasian \_\_\_\_\_ %

Asian/Pacific \_\_\_\_\_ %

6. Total number of students with disabilities. \_\_\_\_\_

7. Percentage of students who are:

Learning Disabled \_\_\_\_\_ %

Educable Mentally Handicapped \_\_\_\_\_ %

Trainable Mentally Handicapped \_\_\_\_\_ %

Severe/Profound \_\_\_\_\_ %

Orthopedically Impaired \_\_\_\_\_ %

Visually Impaired \_\_\_\_\_ %

Autistic \_\_\_\_\_%

Hearing Impaired \_\_\_\_\_%

Speech/Language Impaired \_\_\_\_\_%

Behavior/Emotionally Impaired \_\_\_\_\_%

TBI \_\_\_\_\_%

Other Health Impaired \_\_\_\_\_%

Others \_\_\_\_\_%

8. Percentage of students with disabilities who are:

Age 13 and under \_\_\_\_\_%

Age 14-18 \_\_\_\_\_%

Age 19-22 \_\_\_\_\_%

9. Percentage of students who are disadvantaged/poverty level. \_\_\_\_\_%

10. Total number of high school students in system. \_\_\_\_\_

11. Total number of high school special education students. \_\_\_\_\_

12. Total number of high school special education teachers. \_\_\_\_\_

13. Total number of job coaches. \_\_\_\_\_

14. Total number of Carl Perkins staff. \_\_\_\_\_

15. Total number of transition coordinators. \_\_\_\_\_

16. Total number of Carl Perkins staff. \_\_\_\_\_

17. Total number of high schools in system. \_\_\_\_\_

18. Please indicate type of high school schedule(s):

\_Block

\_Alternating weeks

\_Banked time

\_Other

19. Dropout rate for high school:

Regular Ed. Students \_\_\_\_\_%

Special Ed, Students \_\_\_\_\_%

## **XII. ADDITIONAL MATERIALS/ INFORMATION NEEDED**

- List of Vocational Course Offerings
- Sample IEPs with Transition Components
- Sample Career Development Plans (Carl Perkins)
- Written Interagency Agreements
- Graduation Requirements
- Telephone Book

**Community Based Training**

**Occupational Programming  
and recommended procedures  
from Winston- Salem Schools**

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**Standards Based Testing**

- ⌘ Grade Testing
- ⌘ End of Course Testing
- ⌘ Teaching to the Test

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**Post Secondary Outcomes**

- ⌘ Employment
- ⌘ Residential
- ⌘ Community Living
- ⌘ Education

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### **Community Based Training**

- ⌘ Functional
- ⌘ Experiential
- ⌘ Teaching objectives in natural settings

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### **Classroom and community can work hand in hand**

- ⌘ These competencies can begin in the classroom, but need to carry over into the Community. Classroom training can include prevocational skills and aspects of work.
- ⌘ Some skills are best learned in the community.

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### **Clark, 1995**

- ⌘ Occupational Roles
- ⌘ Occupational alternatives
- ⌘ Occupational decisions
- ⌘ Occupational Factors

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**Basic realities of work  
(Clark,1995)**

- ⌘ Society is work oriented
- ⌘ Work is site specific
- ⌘ Work can be impersonal
- ⌘ Work has reward systems
- ⌘ Work has boundaries
- ⌘ Work is seldom done in complete isolation
- ⌘ Not everyone can obtain their first job choice
- ⌘ Work is not permanent

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**Program Development Issues**

- ⌘ Safety
- ⌘ Standards
- ⌘ placement issues
- ⌘ Lack of experience
- ⌘ lack of advocates
- ⌘ dual purpose of other vocational programs

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**Work Experiences**

- ⌘ Need to be real
- ⌘ Combined with other community training
- ⌘ focus on basic work skills

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**Planning and evaluating transition programs (Hasazi, 1983)**

- ⌘ Assessment
- ⌘ Support
- ⌘ Experiences
- ⌘ Securing
- ⌘ supervision
- ⌘ ITP planning

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**⌘ Program centered objectives**

- flexible
- systematic
- available for all students

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**⌘ Characteristics of successful training sites**

- ⌘ Student Participants
- ⌘ Permission forms
- ⌘ Transportation
- ⌘ Schedule
- ⌘ Identifications

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- ⌘Supervision
- ⌘Site folder
- ⌘Teacher Responsibility
- ⌘Student Evaluations

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**Community Based Training  
Occupational Programming  
Procedures and Guidelines Winston/Salem Schools  
Beth Richie, 1999**

**Slide 2**

A paradox exists within public education today that affects high school students with disabilities. On one hand high schools are feeling the pressure of educational reform, with excellence and outcomes being defined in terms of academic rigor and minimum standards.

**Slide 3**

On the other hand schools need to accommodate students with disabilities through individual education programs that are planned in terms of the students transition outcomes-that is adjustment in employment, residential living and independent living.

Current trends indicate that best practices for teaching students with disabilities and reaching outcomes that best prepare students for the community are achieved only in the community and through community based instruction(Wehman, 1995)

**Slide 4**

"Community-based instruction involves the teachers and other education personnel teaching educational objectives in natural community environments, such as work sites, shopping malls, and restaurants. Often instruction in the classroom does not generalize into the community well frequently making the (classroom) instruction nonfunctional. Regardless of the students disability or its severity, community based training experiences appear to be the most functional." (Wehman, pg. 170., 1995)

**Slide 5**

**Critical Prevocational Competencies**

- Identification of
  - personal values one can meet through work
  - societal values one can meet through work
  - remunerative aspects of work
  - occupational opportunities available locally
  - sources of occupational information
  - one's own occupational needs
  - one's own occupation interests
  - one's own major occupational aptitudes
  - requirements and demands of appropriate and available jobs

**Community Based Training  
Occupational Programming  
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**Slide 5**

**Critical Prevocational Competencies**

- Identification of
  - personal values one can meet through work
  - societal values one can meet through work
  - remunerative aspects of work
  - occupational opportunities available locally
  - sources of occupational information
  - one's own occupational needs
  - one's own occupation interests
  - one's own major occupational aptitudes
  - requirements and demands of appropriate and available jobs

Brolin(1989) advocates the development of these competencies in the classroom extending over in the community. While initiated with the classroom and schoolbased experiences there are some areas best learned in and reinforced in the community.

**Understanding:**

- Dynamics of work place demands
- Process of searching for a job
- Applying for a job
- Interviewing for a job
- Behaviors expected in competitive standards on a job
- Behaviors necessary to maintain post-school occupational adjustment

Interests can change once an individual has had an opportunity to experience the parameters, skills and demands of specific tasks and workplace requirements.

Which of the competencies listed would best be reinforced through actual work experience and training?

**Slide 6**

Clark suggests viewing the content of occupational training in the kinds of information that students with disabilities need to learn. He looks at beginning in the early childhood years with the concepts of occupational roles, occupational vocabulary, occupational alternatives and basic information related to the realities of work.

**Occupational roles**

**Occupational alternatives**

**Realities of the world of work**

-Occupational roles-programs should provide learning opportunities that result in a student's awareness in the variety of roles that exist in the local economy and community

-Occupational alternatives- Occupational choice is a developmental process, without experience, choice, and normal occupational role development becomes further delayed for students with disabilities.

-Realities, occupational decision making can occur in three stages or periods. The process involves a series of decisions made over a period of years. The stages are

- Fantasy
- Tentative choice
- Realistic choice

This entire process is characterized by many groupings of factors, opportunity, abilities, education, age, geography and many more. Some individuals will have to

compromise very little with their first choices and some will need the right experiences to make a realistic choice.

#### **Slide 7**

#### **Realities**

Clark identified some basic realities of work.

They include:

1. America is a work-oriented society
  2. Work, whether paid or unpaid occurs in a particular locale (office, shop, garage, hospital,) most often outside of the home, and school.
  3. Paid work is (can be) largely impersonal work. Supervisors can determine, what is accomplished, the way it is accomplished, social interactions of work are different than our personal interactions
  4. Work has several reward systems, money, to be of service, opportunity to pursue own interests and abilities, people work for other things than money.
  5. Work is bound by time, starting and ending, penalties for tardiness.
  6. Work is seldom performed in complete isolation or independence. Most work involves two or more people interacting
  7. Not everyone can obtain their first choice and be employed in their job of choice.
  8. The choice of an occupational area or a specific job is not permanent or binding, people have choices.
- Resistance-(Weisgerber,Dahl & Appleby, 1980)

#### **Slide 8**

Some schools experience resistance with developing access to regular vocational programs, Weisberger, and colleagues site factors in program resistance and development.

- Safety
- Standards-unwillingness to comprise or alter course requirements
- Successful placement rate issues (harder to place students with disabilities)
- Lack of experience of regular educators in working with and having knowledge of abilities and capabilities
- a lack of advocates for students to obtain assignments to vocational programming.
- Programming-common goals(purpose of Community based training)
- Common ground and territory between all work and transition programs

#### **Slide 9**

1. Provide real work experiences in combination with in-school training and general education, enabling students to acquire knowledge, skills and appropriate attitudes necessary for independent living in the community.
2. Remove the artificial barriers that separate the concepts of work, independent living, and education.
3. Provide the connections between school and the community.

### **Work Activities(and community-based instruction)**

Part of the vocational training continuum. Focus is on basic work skills. Underlies programming for students with more severe disabilities as well as students with milder disabilities. (-task behavior, personal social skills, and independent living with work tasks as the instructional medium and can be accomplished through community based as well as school based activities.

### **Labor Market**

Clark(1995) It is a fact that employability skills are vital, but at some point specific occupational skill training for employment must be addressed.

#### **Slide 10**

### **Planning and Evaluating(Hasazi, 1983)**

#### **- Assessment Procedures**

Develop and implement assessment procedures that identify functional skills and interests related to current and future employment and transitioning opportunities in the community

#### **-Support Services**

Provide necessary support services to ensure proper access to mainstream vocational coursework

#### **-Work experiences in identified area of interest and skill**

Provide at least four work experiences in identifies area of skills and interests

#### **-Securing employment**

Ensure employment before graduation

#### **- Supervision and follow-up**

Provide supervision and follow up before and up to graduation in part-time and full-time employment

#### **- ITP planning with appropriate adult service agencies**

#### **Slide 11**

### **Program Centered Objectives**

#### **- Flexible Scheduling**

allow for flexible teacher schedules to meet the training and monitoring needs of students placed in community settings.

#### **- Systematic follow up**

design and implement a systematic follow up procedure for contacting students following graduation to determine employment status.

#### **- "Youth find"**

Identify all students with disabilities in need of vocational components and training in their IEP

Implementing Community-Based Instruction

## **Slide 12**

### **Characteristics of successful Vocational Training sites**

- Employers understand students are there for training
- Worksites offer a variety of tasks
- work site offers opportunity to work and interact with employees without disabilities

(Guideline and Procedure Tips(Winston-Salem/Forsyth Schools-1999))

### **Student Participants-Transition/Work/IEP Goals**

Students participating in the community based training program must have it written in their IEP. This is mandated by the Department of Labor for CBVT participation as well as required by the Department of Public Instruction to qualify for the use of transportation funds. It is the responsibility of the IEP case manager to make sure that the student has a CBVT goal included in his/her IEP.

### **Permission Forms**

– Forms must be signed by the parent or guardian. These forms will give permission for the following:

- Form 1- Community Based Vocational Training (Paid and Non-Paid)  
Transportation  
Release of Information  
Insurance Waiver
- Form 2- Medical Emergency Information

### **Transportation**

Schedules and drivers need to be assigned. Many systems have the teachers drive .

### **Student Locator/Schedule Information**

A system must be in place with the school that communicates where you and your students are at all times. A copy of the training schedule should be left with the attendance office or you can follow the usual procedure required at your school. The CBVT office personnel will send you a letter listing the training schedule, training site assignment, dress code and other important details. That letter will also be shared with parents and guardians to communicate necessary information in regard to CBVT activities.



# Community Based Vocational Training

## Procedures and Guidelines

A paper copy of this manual is included, with permission.

Additional information can be obtained through

Beth Ritchie at Winston-Salem/Forsyth County Schools

[britchie@wsfcs.k12.nc.us](mailto:britchie@wsfcs.k12.nc.us)

Exceptional Children Services

2700 South Main Street

Winston-Salem, North Carolina 27127

# COMMUNITY BASED VOCATIONAL TRAINING MANUAL

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Dear Teachers,

We hope that this CBVT manual will assist you as you implement CBVT at your school. The manual should cover some general technical procedures and address most areas of concern. Please contact the CBVT office if you have questions or concerns that are not addressed.

The staff in the CBVT office is here to serve you, the classroom teacher, as you help your students meet the *Occupational Course of Study* requirements. PLEASE call! We want to help you in any way that we can in meeting those important needs. We will provide you with all the forms and letters needed to implement CBVT. We will develop your training sites and arrange bus transportation to the training site. We will provide you with student ID photo badges. We will be as creative as possible in stretching our job coaches out to meet the needs of the nine high schools. We want to make CBVT a reality for those students who would benefit from this training.

PLEASE let us help! 771-4753

On behalf of the students,

Beth Ritchie

***CBVT...Developing Job Skills...Learning Life Skills!***

## PHILOSOPHY AND STATEMENT OF PURPOSE FOR COMMUNITY-BASED VOCATIONAL TRAINING

Community Based Vocational Training is an effective approach used in delivering education and training to students with disabilities.

Community Based Vocational Training refers to training that takes place in the environment where the skills will ultimately be performed. Using the community as a classroom insures that students will practice the skills and activities not only in the classroom, but also under realistic conditions and the actual demands of the natural setting.

Community Based Vocational Training is based on the belief that all persons, regardless of disability, have a right to comprehensive and appropriate education that will maximize abilities to their fullest potential. By using the community as an extension of the school, students can generalize skills.

### *CBVT goals for students are:*

1. To provide the opportunity to develop and refine independent living skills in the community.
2. To teach appropriate social behavior in realistic settings.
3. To have an opportunity to apply academic skills in a functional environment.
4. To provide non-paid training experiences that will enable students to make an informed choice of a vocation.
5. To develop job skills through vocational training.
6. To help students make a smoother transition from school to work and adult life.

# IMPLEMENTATION PROCEDURES

# **GUIDELINES AND PROCEDURES FOR IMPLEMENTATION OF COMMUNITY-BASED VOCATIONAL TRAINING**

## **Student Participants**

The Fair Labor Standards Act states that youth participating in the non-paid CBVT program will be youth with physical and mental disabilities for whom competitive employment at or above the minimum wage level is not immediately obtainable and who because of their disability, will need intensive on-going support to perform in a work setting. Once the IEP committee has identified CBVT as a goal for a student and he or she is enrolled in Career Preparation II or above the student can begin training. The classroom teacher should contact the CBVT office @ 771-4753 to begin the procedures needed to obtain training for that student.

## **Permission Forms**

Two forms must be signed by the parent or guardian. These forms will give permission for the following:

- Form 1-            *Community Based Vocational Training (Paid and Non-Paid)*  
                      *Transportation*  
                      *Release of Information*  
                      *Insurance Waiver*
- Form 2-            *Medical Emergency Information*

Forms can be obtained from the CBVT office at the Forsyth Vocational High School Annex. A student cannot begin CBVT without the forms completed and signed. The original form should be kept on file at school. A copy of each should be sent to the CBVT office.

## **IEP and Transition Goals**

Students participating in the community based training program must have it written in their IEP. This is mandated by the Department of Labor for CBVT participation as well as required by the Department of Public Instruction to qualify for the use of transportation funds. It is the responsibility of the IEP case manager to make sure that the student has a CBVT goal included in his/her IEP.

## **Transportation**

CBVT office staff will arrange bus transportation to and from your training sites. The transportation office and CBVT office must be informed if a bus has to be cancelled.

## **Student Locator Information**

A system must be in place with the school that communicates where you and your students are at all times. A copy of the training schedule should be left with the attendance office or you can follow the usual procedure required at your school. The CBVT office personnel will send you a letter listing the training schedule, training site assignment, dress code and other important details. That letter will also be shared with parents and guardians to communicate necessary information in regard to CBVT activities.

## **Training Dress Code / ID Badges**

Students must report to their training site in the appropriate uniform or dress. If the students are not prepared for work then they do not go to work and should be graded accordingly. Students must be encouraged to dress in a positive as well as practical manner. Proper hygiene is critical to their success. Students should wear comfortable shoes and weather appropriate attire. Ideally, each student should have a wallet with identification and needed money. The teacher or job coach will have emergency numbers, but it is necessary for the student to develop this important habit of always carrying an ID. The students must wear the picture ID cards when job training. The CBVT staff will arrange a time for each school to have ID cards made at Forsyth Vocational High School.

## **Supervision**

The needs of the student dictate the level of supervision and should be stated in the student's IEP. Some students will need the instruction of a job coach provided by either the school or CBVT office. Other students may benefit best from using natural supports at the job site such as a co-worker or the supervisor.

## **CBVT Folder**

In order to adhere to the Fair Labor Standards Act as put forth by the U.S. Department of Labor and to insure the safety of all persons involved when participating in CBVT, each student will have a CBVT folder. It is suggested that the folder be carried with them to the training site if they are supervised by a job coach. Otherwise, it is imperative that emergency medical information and contact phone numbers be on file at the training site. The CBVT office will supply each student with a CBVT folder.

Other important forms and information that should be included in the CBVT folder when participating in vocational training are:

- Training Plan
- Work Related Behavior Data
- Anecdotal Records
- Functional Assessment
- Emergency Plan Information

The folder keeps valuable information in regard to the student's training experience. It insures that IEP/ITP goals are being addressed and that a lesson plan is in place. It

documents that criteria set forth in IDEA and Department of Labor guidelines are being met. Also, it contains valuable medical information and emergency phone numbers if needed.

### **Teacher Responsibility**

The quality of education should not be compromised. It is the teacher's responsibility to leave lesson plans and instructions with others when off campus. Teamwork is critical in making CBVT an invaluable teaching tool in meeting the needs of our students. All persons involved should be familiar with each student's instructional program. Teaching assistants and volunteers can supervise or provide instruction to students under the supervision of a certified teacher. The teacher is responsible for maintaining the CBVT folder. Any problems or concerns with the training site should be reported to the CBVT coordinator. Appropriate work related behavior should be taught in the classroom as well as at the training site. The teacher should also be responsible for making sure that the students are prepared for work and are punctual in meeting their school bus.

### **Student Evaluations**

Students will be graded on this training experience just as they would be for any class. Punctuality, attendance, and preparedness are critical job skills. The students will not receive credit for the class if they do not meet these requirements. Evaluations will be given out twice per experience. One evaluation will be given out midterm and a final one at the end of the training experience. The evaluation will be completed by the job coach with input from the business site. The teacher will be given a copy of the evaluation to send home with the student. The student must be successful to receive credit needed for the occupational degree course of study.



# STUDENT CBVT FOLDER

# The CBVT Student Folder...

## What does it include and why?

This folder was designed with ACCOUNTABILITY in mind. Using these forms will insure that:

- IEP goals are being addressed
- Criteria set forth in IDEA are being met
- Documentation of DOL guidelines are recorded
- A workable lesson plan is in place
- Needed medical information and permission slips are on file

Below is an explanation for each form in the CBVT folder. A copy of the blank forms and examples can be found in the back of this manual.

**TRAINING PLAN** - Training plans can be thought of as lesson plans. They should be written so that a substitute who has never been to a site could pick up the plan and be aware of all pertinent information. Teachers only need to make one lesson plan per site, but make sure you add a copy to each student's folder. It is suggested that you take notes the first couple of training sessions, and soon after that you should have enough information for a completed training plan.

**WORK BEHAVIOR DATA** - This form should be used on an on-going basis. This is simply a way to address IEP objectives and to record a student's progress. This record of work related behavior is needed to gather necessary information for assessments as well as collecting information to share with other businesses and agencies used in transition. Please use the back of this form to record any *positive* comments you may wish to note about your students.

**ANECDOTAL RECORDS** - The purpose of this form is to provide documentation for the Labor Department that the student requires supervised work training. The primary function of this form is to document ways the student is *not* independent and the reasons he/she needs CBVT. The comments on this form should address ways the student impedes the flow of business and/or needs assistance. Another form is included to record positive comments. Do not write any positive comments on the ANECDOTAL RECORD form. The GENERAL COMMENTS AND OBSERVATIONS form is included for those positive comments and other observations.

**FUNCTIONAL ASSESSMENT** - At the end of the training experience this form should be completed and added to an on-going portfolio. This form will summarize the student's job skills and their performance at that particular site. It is our goal that upon graduation each student will have a vocational portfolio that can help analyze his/her strengths in making a career choice and assist in a smoother transition.

**PERMISSION SLIPS** - This section is used to keep all permission slips. Also, the medical form is kept here in case phone numbers are needed to reach parents from the training site or to alert others of medical concerns.

## TRAINING PLAN

SITE \_\_\_\_\_ SITE PHONE # \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_

JOB COACH \_\_\_\_\_ TRAINING DAYS / TIMES \_\_\_\_\_

BEGINNING & ENDING DATES \_\_\_\_\_

### STUDENT NAMES:

List all students on site. Note any specific needs of individual students such as medication, hygiene difficulties, amount of supervision necessary, mealtime difficulties, dietary restrictions, etc...

Activities and Timelines:

This form is used to collect information for the training plan. It is suggested once the information is collected it can be typed up to be included in the CBVT folder. *Additional Helpful Hints:* Bus pick up times and locations; rules that may be site specific such as lunch prices, seating arrangements, location of bathrooms, stockrooms, etc.







## GENERAL COMMENTS AND OBSERVATIONS

STUDENT NAME \_\_\_\_\_ TRAINING SITE \_\_\_\_\_

JOB COACH \_\_\_\_\_ SCHOOL YEAR \_\_\_\_\_

SCHOOL \_\_\_\_\_

DATE \_\_\_\_\_ COMMENTS / OBSERVATIONS \_\_\_\_\_

Use this form to record any *positive* comments and progress concerning the CBVT experience. Also, please record any observations that may be helpful in Transition planning. Please remember the ANECDOTAL RECORDS form is used for comments in regard to needs and weaknesses.

**COMMUNITY BASED VOCATIONAL TRAINING**  
**Winston-Salem/Forsyth County Schools**  
**FUNCTIONAL ASSESSMENT - PORTFOLIO INFORMATION**

NAME \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SS# \_\_\_\_\_

SITE \_\_\_\_\_ CONTACT PERSON \_\_\_\_\_

DATES (start/end) \_\_\_\_\_ DAYS / TIMES \_\_\_\_\_

JOB COACH \_\_\_\_\_ SITE PHONE # \_\_\_\_\_

**JOB DESCRIPTION/DUTIES -**

**PERFORMANCE -**

**Strengths -**

**Weaknesses -**

**Production Rate -**

**Quality -**

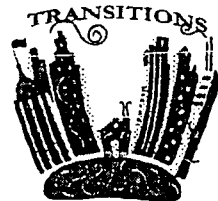
**Improvements Made -**

**Job Coach Comments -**

**Student comments in regard to this training experience -**

**This form should be completed by the job coach at the end of each training site. The information collected is essential for the student portfolio and resume. It is the intent of this form to help analyze the student's vocational strengths and to assist him/her as they make career choices.**





# MEDICAL/EMERGENCY INFORMATION COMMUNITY BASED VOCATIONAL TRAINING

Winston-Salem/Forsyth County Schools

## STUDENT INFORMATION:

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security # \_\_\_\_\_ Age \_\_\_\_\_

Planned Graduation Year \_\_\_\_\_ School \_\_\_\_\_

Is the student enrolled in the *Occupational Degree Program*? \_\_\_\_\_

## PARENT/GUARDIAN INFORMATION:

Home Phone : Father \_\_\_\_\_ Mother \_\_\_\_\_

Work Phone : Father \_\_\_\_\_ Mother \_\_\_\_\_

## EMERGENCY INFORMATION:

In case of emergency contact:

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Phone Number \_\_\_\_\_

## BEHAVIOR/SAFETY INFORMATION:

Please list special information about the student that would help in case of an emergency:

\_\_\_\_\_  
\_\_\_\_\_

Hospital Preference \_\_\_\_\_

Doctor(s) Name \_\_\_\_\_ Phone Number \_\_\_\_\_

Allergies \_\_\_\_\_ Seizures \_\_\_\_\_

Other Health Problems \_\_\_\_\_

Dietary Restrictions \_\_\_\_\_

Special Comments: \_\_\_\_\_

\_\_\_\_\_

Parent/Guardian  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

White-School

Yellow-CBVT Folder

Pink-Student/Parent

**Emergency Plans**  
**Community Based Vocational Training**  
**WINSTON-SALEM/FORSYTH COUNTY SCHOOLS**

Teachers should be familiar with individual student needs and concerns. An action plan is necessary if an emergency should occur (seizure, asthma attack, diabetic shock, diet restrictions, etc.).

If an emergency occurs on a CBVT trip two procedures should be followed immediately. The first is to secure the supervision and safety of the student, and the second is to notify the proper authorities.

Each staff member should carry sufficient change for a phone call in case of an emergency. They should also carry a copy of each student's medical and emergency information. This information should be in the CBVT folder.

**Medical Emergency Procedures:**

*In an emergency follow these procedures:*

- ✓ Dial 911
  - ✓ Ask for paramedic assistance
  - ✓ Give address/location of emergency
  - ✓ State the severity of the injuries
  - ✓ Contact Principal/ School Administration at
- 
- ✓ Provide necessary student information

*For all emergencies (major or minor) do the following:*

1. If there are two adults present on site, one should go with the student in the ambulance.
2. If only one is present, he/she should remain with the group.
3. The Principal or other School Administrator should contact the parent/guardian.
4. Fill out all necessary forms immediately upon returning to school.
5. Contact the CBVT office and inform the staff of the incident 771-4753 (office) 726-3881 (pager).

**PARENT/GUARDIAN  
INFORMATION**



# Community Based Vocational Training

WINSTON-SALEM/FORSYTH COUNTY SCHOOLS

Dear Parents or Guardians,

We are pleased to tell you that our students will be participating in non-paid *Community Based Vocational Training*. This program (*CBVT*) provides our students opportunities to develop and refine successful vocational skills while training in the community. Work experience training is a required component of the occupational course of study. With *CBVT*, the community becomes an extension of the classroom as students go off campus to learn skills that are needed as they transition into their adult life. Instruction and evaluation will be completed both in the community and in the classroom.

Attached are two forms that must be completed, signed, and returned as soon as possible in order for your child to participate in *CBVT*. Specific information will be sent home notifying you and your child of the training site and the training schedule. *CBVT* will be held within the hours of the school day.

We appreciate your immediate attention, completion and return of these forms. If you have any questions or comments, please feel free to contact me at school.

Sincerely,

*Without opportunity, potential may go unrealized*

# COMMUNITY BASED VOCATIONAL TRAINING PERMISSION FORM



WINSTON-SALEM / FORSYTH COUNTY SCHOOLS DIVISION FOR EXCEPTIONAL CHILDREN'S SERVICES TRANSITION OFFICE

\_\_\_\_\_ has my permission to participate in the community based instruction / training program.

I understand that this *may* include exploration trips, job sampling, non-paid and paid vocational training as well as activities in the community to develop recreation/leisure skills and independent living skills. This instruction will take place in various community settings.

I give my permission for him / her to be transported to the community sites by Winston-Salem / Forsyth County School personnel. I understand that students will be transported in school vehicles (bus) to the instruction/training sites and that all school rules, regulations and procedures apply to students while off campus. Some students may be transported by public transportation if this is part of their transition training. On very rare occasions, students may be transported in a teacher's private vehicle.

I give permission for the personnel of the Winston-Salem/Forsyth County Schools to release relevant information concerning the above named student's abilities, needs and special accommodations related to participation in the planned community-based instruction/training activities to business / adult service providers involved. I understand that the release is in effect for 1) businesses and nonprofit organizations participating in community-based activities including job exploration, job shadowing, job training, and work experience and 2.) adult service providers involved in transition planning.

I release all participating community sites and places of business of any liability for any injury that may occur while at these sites as part of community based instruction or job training. I understand that every precaution will be taken to ensure the safety and welfare of the program participants. I, the undersigned parent/guardian acknowledge that the Winston-Salem/Forsyth County Board of Education and places of business participating in the transition instructional/training program are not responsible for payment of any medical expenses or any other damages resulting from any injury that may be suffered by the above named student while participating in the community based instruction/training. I understand that students involved in job training are required to have school insurance or verification of other insurance coverage on file.

I do hereby give and grant unto Winston-Salem/Forsyth County Schools permission to use and publish photographs or videotapes of my child whose name appears above.

I do hereby certify that I am of full legal capacity to execute the foregoing authorizations and releases. I am aware that I may cancel these permissions by notifying the school in writing.

Signature of Parent /Guardian	Signature of Student	Date
Student Date of Birth	Name of Insurance (Private or Medicaid)	Policy Number
White-School	Yellow-CBVT Coordinator	Pink-Student/Parent

## COMMUNITY BASED VOCATIONAL TRAINING

I understand that the *non-paid* vocational training adheres to the Department of Labor guidelines. Those guidelines include:

1. The sole purpose is for exploration, assessments and / or training.
2. Community based instruction / training will be included on the student's IEP/ITP.
3. Placement of the student at a business does not displace other employees.
4. The student is placed at a site to meet the needs of the student and not those of the business.
5. Only students in paid training positions are entitled to worker's compensation or other benefits.
6. Students are not guaranteed a job at the end of training. The training site is to be used to develop and refine appropriate job skills.

**MEDICAL/EMERGENCY INFORMATION**  
**COMMUNITY BASED VOCATIONAL TRAINING**  
Winston-Salem/Forsyth County Schools



**STUDENT INFORMATION:**

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security # \_\_\_\_\_ Age \_\_\_\_\_

Planned Graduation Year \_\_\_\_\_ School \_\_\_\_\_

Is the student enrolled in the *Occupational Degree Program*? \_\_\_\_\_

**PARENT/GUARDIAN INFORMATION:**

Home Phone : Father \_\_\_\_\_ Mother \_\_\_\_\_

Work Phone : Father \_\_\_\_\_ Mother \_\_\_\_\_

**EMERGENCY INFORMATION:**

In case of emergency contact:

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Phone Number \_\_\_\_\_

**BEHAVIOR/SAFETY INFORMATION:**

Please list special information about the student that would help in case of an emergency:

\_\_\_\_\_  
\_\_\_\_\_

Hospital Preference \_\_\_\_\_

Doctor(s) Name \_\_\_\_\_ Phone Number \_\_\_\_\_

Allergies \_\_\_\_\_ Seizures \_\_\_\_\_

Other Health Problems \_\_\_\_\_

Dietary Restrictions \_\_\_\_\_

Special Comments: \_\_\_\_\_

Parent/Guardian  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

White-School

Yellow-CBVT Folder

Pink-Student/Parent

WINSTON-SALEM/FORSYTH COUNTY SCHOOLS  
Community Based Vocational Training  
Student Contract

Student  
Name \_\_\_\_\_

Date  
Initiated \_\_\_\_\_

Teacher \_\_\_\_\_ Training Site \_\_\_\_\_

I, \_\_\_\_\_ agree to the following conditions of participation in the off-campus vocational training programs of the Winston-Salem/Forsyth County Schools.

- ✓ I agree to work cooperatively with any school staff person or business employee assigned to assist with my supervision.
- ✓ I agree to report for the bus at the assigned time.
- ✓ I agree to use appropriate language on the training site.
- ✓ I agree to always perform to the best of my ability and to try as hard as I can to do a good job.
- ✓ I agree to dress appropriately for the training site.

I understand that failure to follow the above guidelines can result in a suspension from the training site and no class credit.

Student  
Signature \_\_\_\_\_ Date \_\_\_\_\_

Teacher  
Signature \_\_\_\_\_ Date \_\_\_\_\_



# COMMUNITY BASED VOCATIONAL TRAINING

## Work Related Behavior Goals

### WINSTON-SALEM/FORSYTH COUNTY SCHOOLS

#### ***ATTENDANCE:***

1. Reports on time
2. Regular attendance

#### ***PRODUCTIVITY:***

1. Works at adequate speed alone
2. Follows directions
3. Possesses /demonstrates endurance
4. Works with adequate speed with co-workers
5. Is attentive to task
6. Follows directions on materials care

#### ***RELATING TO SUPERVISOR:***

1. Works without excessive demands on supervisor
2. Reacts positively to supervisor's suggestions
3. Communicates needs to supervisor

#### ***RELATING TO CO-WORKERS:***

1. Cooperates with co-workers
2. Is assertive in helping co-workers
3. Reacts positively to co-workers

#### ***WORK ATTITUDE & BEHAVIOR:***

1. Takes pride in work
2. Works steady even though may not like the work
3. Behavior is age appropriate

#### ***WORK ASSIGNMENT:***

1. Remains in assigned area
2. Limits personal conversations
3. Understands/practices safety precautions

#### ***APPEARANCE:***

1. Comes to work site neat, clean & appropriately dressed

*Dear Students,*

*The behaviors listed above are the ones that will be stressed while you are at your training site. Please share this list with your parents or guardians. These are the behaviors that will help make you a success as you enter the world of work. **Good Luck!!! ☺***

***YOU CAN DO IT!!! YOU ARE GREAT!!! GO FOR IT!!!***

# Community Based Vocational Training

## Progress Report

Winston-Salem / Forsyth County Schools



STUDENT TRAINEE \_\_\_\_\_ DATE \_\_\_\_\_  
 SCHOOL \_\_\_\_\_ SITE \_\_\_\_\_  
 TRAINING SCHEDULE -Days \_\_\_\_\_ Times \_\_\_\_\_

QUARTER 1 2 3 4

Overall Grade: A B C D F

*The circled grade accurately reflects the performance of the student in that category as observed by the job coach at the training site.*

1. How well does the student show initiative at the training site?

A                      B                      C                      D                      F                      NA

2. Is this student showing evidence of satisfactory progress?

A                      B                      C                      D                      F                      NA

3. How well does student respond to supervision?

A                      B                      C                      D                      F                      NA

4. How well does student cooperate with fellow workers?

A                      B                      C                      D                      F                      NA

5. How well does this student stay on task?

A                      B                      C                      D                      F                      NA

6. Has this student's record of attendance and punctuality been satisfactory?

A                      B                      C                      D                      F                      NA

7. How well does this student follow instructions?

A                      B                      C                      D                      F                      NA

8. Does student adhere to the dress code at training site?

A                      B                      C                      D                      F                      NA

Evaluated By \_\_\_\_\_ Title \_\_\_\_\_

GRADING KEY -  
 A - VERY GOOD  
 B - GOOD

C - FAIR  
 D - POOR

F - FAILING  
 NA - NON APPLICABLE

White (Student/Parent)

Yellow (CBVT Office)

Pink (School)

**BUSINESS / TRAINING SITE  
COMMUNICATIONS**

Beth Ritchie  
2700 South Main Street  
Winston-Salem, North Carolina  
britchie@spark.wsfcs.k12.nc.us

~ WS/FCS - *Community Based Vocational Training* ~

April 18, 2000

Dear Friend,

Thank you for your interest in our Community Based Vocational Training initiative. The primary goal of the *non-paid* Community Based Vocational Training program is to develop work-appropriate behavior and job skills in our students with special needs. This is accomplished best by giving the students the opportunity to train at the actual job site. With your cooperation and this training, students with disabilities can become vital members of our community. Our students usually train in a small group of two or three and are accompanied by their teacher if needed. Presently, we train two days a week for a few hours each session.

I am very proud to report that 100% of the businesses in which we have trained have invited us back to train again. Some of the sites are TARGET, BAPTIST MEDICAL CENTER, THE FOOD BANK OF N.C., BOSTON MARKET, T.J. MAXX, CHICK-FIL-A, PIEDMONT DELIVERY, WACHOVIA BANK, LUCIA, BI-LO, and BRIGHTON GARDENS just to name a few.

Our program is designed in accordance with the guidelines set forth by the Department of Labor. Each student has a training folder that he/she carries on site. This folder contains valuable documentation that insures that we are meeting the criteria set forth by Individuals with Disabilities Education Act (IDEA) as well as abiding by the Department of Labor Guidelines. Also, there is a Community Based Vocational Agreement in place between the business sites and the WSFCS Board of Education.

I hope this letter and the enclosed fact sheet on this initiative will answer any questions you may have about the program. I know this can be a rewarding and positive experience for your business and some very important members of our future workforce in Forsyth County.

On behalf of our students,

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*Without opportunity,  
potential may go unrealized*

## COMMUNITY BASED VOCATIONAL NON-PAID TRAINING WINSTON-SALEM / FORSYTH COUNTY SCHOOLS

### *Purpose of the Program ~*

The purpose is to provide students with disabilities the opportunity to receive realistic vocational experiences in a variety of Winston-Salem businesses and organizations. This program is in compliance with the recent amendments to the Individuals with Disabilities Education Act (IDEA). The vocational training program is a component of each student's individual educational plan, and is designed to assist with a smoother transition as they move from their school career to adult life. This is a non-paid training experience.

### *Students ~*

All of the students are enrolled in a special education program. Their exceptionalities may include mental, physical, or emotional handicaps. The interest, abilities and past experiences of each student help determine the type of vocational training he/she experiences.

### *School Staff ~*

Supervision and training are provided by school personnel. A school staff person is present at all times while the students are working unless it has been agreed upon by both the school and business that a student is ready to work more independently.

### *Community Job Sites ~*

The job site provides students with the opportunity to learn meaningful vocational skills in realistic work environments. This cannot be duplicated by any other means available to the public school system. Job site personnel are encouraged to become involved with the students to the degree in which they feel comfortable.

### *Day/Times/Number of Students ~*

The days and times that a job site is utilized, as well as the number of students at the site are negotiated between each individual job site and school staff.

### *Cost to Employer - NONE ~*

These activities will be conducted as part of the school training program. Businesses will not be expected to provide any reimbursement to the students for work done on their premises. It is our intent to provide training experiences, not to replace working employees.

### *Liability ~*

Each student who participates in the CBVT program must have a signed insurance waiver releasing Winston-Salem/Forsyth County Schools and all community sites and places of businesses from any liability for any injury that may occur while in these training sites.

WINSTON-SALEM/FORSYTH COUNTY

BOARD OF EDUCATION

COMMUNITY BASED VOCATIONAL TRAINING AGREEMENT

SCHOOL

BUSINESS OR AGENCY

NAME: \_\_\_\_\_

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PRINCIPAL: \_\_\_\_\_

REPRESENTATIVE: \_\_\_\_\_

PHONE: \_\_\_\_\_

TITLE: \_\_\_\_\_

CBT COORDINATOR: \_\_\_\_\_

PHONE: \_\_\_\_\_

PHONE: \_\_\_\_\_

PERIOD OF INSTRUCTION: \_\_\_\_\_ 199\_\_ THROUGH \_\_\_\_\_

MAXIMUM NUMBER OF STUDENTS AT SITE AT ANY TIME: \_\_\_\_\_

The Winston-Salem Forsyth County Board of Education (the "Board of Education") and the business or agency (the "Business") named above have agreed to cooperate to provide community-based training for students, in accordance with each student's Individualized Educational Plan and, if appropriate, Individualized Transition Plan. The Board of Education and the Business enter into the following agreement for providing community-based vocational instruction:

1. The Business understands and agrees to the following provisions regarding the vocational instruction program ( the "Program"):

(a) The Business will allow the Board of Education to conduct community-based vocational instruction at its work site at the address stated above, provided that the number of students attending the site at any one time shall not exceed the number stated above.

(b) The work setting at the Business will provide students an opportunity to experience and perform meaningful vocational skills in a realistic work situation.

(c) Where possible, the students will be exposed to a variety of different tasks in order to teach them different skills.

(d) The students will not be considered to be "employees" of the business for any purpose. To ensure that the students are not "employees" for purposes of the Fair Labor Standards Act, the Business understands that the primary beneficiaries of the Program will be the students, and that as a result of the Business' participation in the program:

- \* no immediate advantage will be derived by the Business from the students' duties;
- \* no displacement of any employee or reduction of employee work hours will occur;
- \* vacant positions (whether temporary, emergency or otherwise) will not be considered filled by the students; and
- \* employees will not be relieved of assigned duties.

(e) The Business may assign employees to work with students; however, the students will always be under the ultimate supervision of the Board of Education. The exact type of work and the work station of each student will be agreed upon by the Business and the Board of Education employee(s).

(f) Days and hours during which the students will be participating in the Program at the Business site will be agreed upon by the Business and the Board of Education employee(s); however, no student will participate in the Program at the Business for more than 120 hours. Students will not participate in the Program on school holidays.



WINSTON-SALEM/FORSYTH COUNTY

BOARD OF EDUCATION

COMMUNITY BASED VOCATIONAL TRAINING AGREEMENT

- (g) The Business has no obligation to hire any of the students.
- (h) The Business is not permitted to pay the students for their participation in the Program, other than a nominal stipend if it so elects.
- (i) The Business will comply with all federal, state, and local health and safety standards as they apply to the students.
- (j) The Business will not discriminate against the students on the basis of race, color, religion, national origin, disability, or sex.

2. The Board of Education agrees to:

- (a) Provide transportation to and from the Business site.
- (b) Provide direct supervision to students at the Business site. Direct supervision can include one-to-one instruction, small group instruction, supervision in close proximity, and supervision in regular intervals when the goal is to assess a student's ability to work independently.
- (c) Require that the provided direct supervision will comply with all workplace health and safety rules established by the Business and instruct the students to comply with the same.
- (d) Be responsible for the safety of the students to the same extent as if the students were participating in an on-campus program.
- (e) Conduct a job analysis in consultation with the Business to determine the exact type of work and the work station of each student.
- (f) Conduct evaluations of the students' performance with input from the Business.
- (g) Provide professional and technical assistance relating to the Program and to the Business.

WINSTON-SALEM/FORSYTH COUNTY  
BOARD OF EDUCATION

\_\_\_\_\_  
(NAME OF BUSINESS)

BY \_\_\_\_\_  
REPRESENTATIVE

BY \_\_\_\_\_  
REPRESENTATIVE

DATE \_\_\_\_\_

DATE \_\_\_\_\_

COMMUNITY BASED VOCATIONAL TRAINING  
WSFC SCHOOLS

TO:  
FROM:  
SUBJECT:  
DATE:

TRAINING SCHEDULE -

TRAINING DATES -

JOB COACH -

STUDENT TRAINEES -

Thanks for joining us in this important initiative on behalf of our students. I will be in touch to answer any questions or concerns you may have in regard to this experience. Please call or page me with ANY concerns. I will be happy to help!

771-4753 *Office*

726-3881 *Pager*

727-2504 (3366) *Voice Mail*

*Without opportunity potential may go unrealized...*

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*Community Based Vocational Training  
Partners  
Winston-Salem/Forsyth County Schools*

*BI-LO  
BIG LOTS  
CATO  
CHICK-FIL-A  
CLEMMONS DISCOUNT  
COUNTRY ROADHOUSE BUFFET AND GRILL  
FAMILY DOLLAR  
FIVE STAR SUPERMARKET  
HARRIS TEETER  
HEADSTART OF FORSYTH COUNTY  
JORDAN'S BODY SHOP  
KAPLANS  
KIDS 'R'US  
K.J.'S KIDDIELAND  
K & W CAFETERIA  
MANORHOUSE  
MARSHALLS  
MEADOWBROOKE TERRACE  
OAK SUMMIT RETIREMENT HOME  
OFFICE DEPOT  
PARTY CITY  
PIEDMONT DELIVERY  
REYNOLDA PARK  
SECOND HARVEST FOOD BANK OF NC  
SHOE SHOW  
STEINMART  
TARGET  
TRIAD PACKAGING  
T.J. 'S DELI  
T.J. MAXX  
VILLAGE SODA SHOP  
WACHOVIA  
WAKE FOREST UNIVERSITY BAPTIST MEDICAL CENTER  
WSFCS BAKERY  
YMCA*

IN SUMMARY...

### *To get started...*

- ✓ The student must be enrolled in Career Preparation II, III or IV.
- ✓ The student must have a CBVT goal on his/her IEP.
- ✓ Contact the CBVT office for the appropriate permission forms to be sent home with students that have been identified to receive CBVT.
- ✓ Once the permission slips have been returned, send a copy to the CBVT office so that they can begin developing an appropriate training site.
- ✓ A training site and schedule will be worked out to meet the needs of the student.
- ✓ Before the training begins the CBVT office will send home a letter with important information about the student's job site, the training schedule and required dress code.
- ✓ Job coaches should learn what task the students will be involved with at the site. If possible, coaches should visit the job site before the student's first day so that they can have a better idea of their assignments. They should find out particulars, such as which door to come in and where to hang the coats. It is important for the coaches to remember that the students will not be able to perform the tasks at first
- ✓ Coaches are responsible for checking with managers and assistant managers on a daily basis pertaining to available tasks, problems or concerns. Sometimes they may need a gentle push to let the students try new jobs. The CBVT Coordinator is available to assist the coaches if they feel like the students aren't being challenged enough at the job site.
- ✓ Coaches should establish a routine for their students. This information should be included in the *Training Plan*. The CBVT office will write the plan with information provided by the job coach. This plan should be included in the CBVT student folder. An example is provided below.

Hang up coats and store notebooks.

Check or clock in.

Assign task to each student.

Students find needed supplies to complete task.

Incorporate quality control according to the business' expectations.

Stop work in time to leave work station organized.

Have students communicate to the contact person what was accomplished.

Gather notebooks and coats.

Clock or Check out.

Take a break and wait on the bus.

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Have students communicate to the contact person what was accomplished.

Gather notebooks and coats.

Clock or Check out.

Take a break and wait on the bus.

- ✓ Coaches should get to know the manager and his/her team. Once they realize the potential that your students possess they will be more willing in trusting them with more meaningful tasks. Most employees will let the students try different tasks if they know that the coach will be there to guide them along. To develop good work habits encourage your students to communicate with their supervisor at the training site when they will not be at work.
- ✓ Before students leave campus the teacher should make sure that the correct procedure has been followed for taking students off campus.
- ✓ The CBVT folders should be carried to the training site and maintained by the job coach. It is the responsibility of the job coach to take data on an ongoing basis. The *Work Related Behavior* form in the CBVT folder is for this purpose. This information will be used to summarize progress and update IEP goals. The FAIR LABOR STANDARDS GUIDELINES require that appropriate data be maintained for each training site.
- ✓ Once a training experience has ended the coach will complete the *Work Experience Summary*. This information will then become part of the student's portfolio that he/she will receive upon graduation. This information will be shared, as needed, with other agencies and businesses to assist in a successful transition from school to work after graduation.

## ***CBVT IS...***

- ✓ Using the community as a classroom
- ✓ Required if pursuing the Occupational Degree
- ✓ On the job *non-paid* vocational training that starts in Career Prep. II (10<sup>th</sup> grade)
- ✓ An opportunity to develop appropriate job skills
- ✓ A *non-paid* training experience
- ✓ For functional vocational assessments
- ✓ Developing career awareness
- ✓ An IEP team decision and must be included in the IEP
- ✓ The same as a class, therefore all classroom requirements must be met for course credit
- ✓ An extension of your school experience
- ✓ Being there...attendance and punctuality are mandatory
- ✓ Developing responsibility...Wearing the proper uniform and abiding by the dress code
- ✓ Creating an opportunity to develop social skills
- ✓ INCLUSION IN THE REAL WORLD

## ***CBVT IS NOT...***

- ✓ A guaranteed paid job
- ✓ Something you attend some of the time
- ✓ Training for just one particular vocation
- ✓ Just for fun
- ✓ Something that you quit...just like you can't quit a class
- ✓ A way to get out of school

# Community Based Vocational Training

## WHO?

CBVT is for students who...

- ✓ have physical and or mental disabilities for whom competitive employment at or above the minimum wage level is not immediately obtainable and who, because of their disability, will need intensive ongoing support to perform in a work setting
- ✓ have a defined component in their IEP
- ✓ are enrolled in Career Preparation II,III or IV
- ✓ have signed permission slips for CBVT

## WHAT?

CBVT is...

- ✓ using the community as a classroom
- ✓ exploration, assessment, & training
- ✓ developing communication skills
- ✓ applying, refining, & developing academics as they relate to work
- ✓ exploring the world of work
- ✓ learning job skills *at the job site*
- ✓ inclusion in the real world

## WHY?

- ✓ shortcomings in the more traditional education required a change
- ✓ skills are learned best in typical work settings
- ✓ many more opportunities to develop & apply social skills

*Real Work... Real Mistakes...Real Learning!*

## WHEN?

- ✓ 10<sup>th</sup> grade
- ✓ 11<sup>th</sup> grade
- ✓ 12<sup>th</sup> grade
- ✓ The student is enrolled in Career Prep. II,III, or IV

## WHERE?

### *The Community...*

Wake Forest University Baptist Medical Center  
Chick-Fil-A  
T.J. Maxx  
K&W Cafeteria  
Kids 'R'Us  
Headstart of Forsyth County  
Harris Teeter  
Cato  
Clemmons Discount  
Party City  
Kaplan's  
Triad Packaging  
Holiday Inn  
Brighton Gardens

Wachovia  
T.J.'s Deli  
Country Roadhouse Buffet & Grill  
Target  
K.J.'S Kiddieland  
Five Star Supermarket  
Manorhouse At Winston-Salem  
Reynolda Park Assisted Living Community  
Family Dollar  
Food Bank of North Carolina  
YMCA  
Piedmont Delivery  
Office Depot  
Jordans Body Shop

*ANYWHERE...EVERYWHERE!!!*

## HOW?

- ✓ identify students who need CBVT
- ✓ write an IEP goal to include CBVT
- ✓ make sure student is enrolled in appropriate course. (Career Prep. II, III, or IV)
- ✓ contact the CBVT office with a list of those students that qualify
- ✓ CBVT office will help make CBVT a reality for your students by providing needed forms, arranging transportation, assisting with job coaching, develop training sites, educating parents, students, and supporting the teacher

## Coaching Winners...

*Job Coaching Do's and Don'ts for bringing out the best in your students!*

### Do...

- ✓ Model the expected behavior
- ✓ Always wear ID badge and require students to do the same
- ✓ Make sure that the students are dressed appropriately before leaving campus
- ✓ Have student CBVT folders with you at all times and maintain records
- ✓ Have students sign in and sign out
- ✓ Encourage co-workers to communicate with the students first
- ✓ Challenge your students - ask supervisors to let your students try something new
- ✓ Insure quality control
- ✓ Facilitate inclusion at the work site
- ✓ Take a break when needed to problem solve and discuss concerns as they occur
- ✓ Celebrate successes
- ✓ Respect confidentiality and personal dignity of the student
- ✓ Only accept age appropriate behavior (handshakes, same behavior expectations as others, etc.)
- ✓ Communicate progress with students, other teachers and parents
- ✓ Keep students on task – be creative... There is always work somewhere
  - Take merchandise off shelves for students to restock*
  - Re-file files*
  - Re-do other jobs for practice and mastery*
  - Ask to see training videos*
  - Empty trash, dust, straighten, shine*
  - Sort and re-sort*

### Don't...

- ✓ Be shy – advocate for the students
- ✓ Let the students be treated like children
- ✓ Assume the business doesn't care if you or your students are there. They do care
- ✓ Take care of personal business (phone calls, shopping, reading novels)
- ✓ Hold back the students if they are ready for more challenging tasks
- ✓ Just sit and watch



## MY BROTHER DARYL

*He can put 100 pegs in a board in less than 10 minutes while in his seat with 95% accuracy.*

But he can't put quarters in a vending machine.

*Upon command he can "touch" nose, shoulder, leg, foot, ear.*

But he prefers music; but was never taught how to use radio or record player.

*He can now fold paper in halves and even quarters.*

But he can't fold his clothes.

*He can roll Play Dough and make wonderful clay snakes!*

But he can't roll bread dough and cut out biscuits.

*He can string beads in alternating colors and match it to a pattern on a DLM card!*

But he can't lace his shoes.

*He can sing his ABC's and tell me names of all the letters of the alphabet when presented on a card in upper case with 80% accuracy.*

But he can't tell the men's room from the ladies when we go to the mall.

*He can be told it's cloudy/rainy and take a black felt cloud and put it on the day of the week on an enlarged calendar (with assistance).*

But he still goes out in the rain without a raincoat or hat.

*He can identify with 100% accuracy 100 different Peabody Pictures Cards by pointing!*

But he can't walk up the steps of bleachers unassisted in the gym to go to a basketball game.

*He can count to 100 by rote memory!*

But he doesn't know how many dollars to pay the waitress for a \$2.59 coupon special.

*He can put the cube in the box, under the box, beside the box, and behind the box.*

But he can't find the trash bin in McDonald's and empty his trash into it.

*He can sit in a circle with appropriate behavior and sing songs and play "Duck, Duck, Goose."*

But nobody else in his neighborhood his age seems to want to do that.

I guess he's just not ready yet!

From: TASH Newsletter  
Lewis, 1987

This poem was written about Daryl, an 18 year old TMH student in regard to his years of "individualized instruction." A community based curriculum would have Daryl better prepared for real and age-appropriate situations.

# SAMPLE COMPLETED FORMS

# Community Based Vocational Training

## WINSTON-SALEM/FORSYTH COUNTY SCHOOLS

Dear Students,

This letter is to inform you of your assignment and training schedule for *CBVT*. A copy of your Functional Assessment will be sent home at the end of your training period. If you or your parents have any questions or concerns about this schedule or assignment please contact the *CBVT* office at 771-4753.

We are making a very important effort to stress the importance of appropriate dress and proper hygiene for the workplace. Please come to school prepared for work on your training days.

Thank you for your cooperation in this important venture!

Sincerely,

**C.B.V.T. TRAINING SCHEDULE FOR - Donald Duck**

**C.B.V.T. TRAINER - Beth Ritchie**

<b>DAYS</b>	<b>TIME</b>	<b>SITE</b>
Monday & Wednesday	9:00 to 11:00	Wake Forest Baptist Medical Center

**APPROPRIATE DRESS** - Black pants, black shoes, belt (hospital will provide knit shirt & hat)  
**NEEDS TO BRING** - money for drink

**This CBVT experience will be:**

- Job sampling (one time visit)
- Job shadowing - # of visits \_\_\_\_\_
- Weekly non-paid training

*Without opportunity potential may go unrealized...*

COMMUNITY BASED VOCATIONAL TRAINING  
WSFC SCHOOLS

**TO:** WAKE FOREST BAPTIST MEDICAL CENTER  
**FROM:** BETH RITCHIE ~ CBVT COORDINATOR  
**SUBJECT:** STUDENT TRAINING INFORMATION  
**DATE:** 04/25/009/01/99

TRAINING SCHEDULE ~ Monday and Wednesday 9:00 to 11:00  
TRAINING DATES ~ October 19, 1999 to December 9, 1999  
~ November 11<sup>th</sup> & 25<sup>th</sup> - Student Holidays  
JOB COACH - ~ Gloria Smith  
STUDENT TRAINEES ~ Donald  
Sam

Thanks for joining us in this important initiative on behalf of our students. I will be in touch to answer any questions or concerns you may have in regard to this experience. Please call or page me with ANY concerns. I will be happy to help!

771-4753 *Office*

726-3881 *Pager*

727-2504 (3366) *Voice Mail*

*Without opportunity potential may go unrealized...*

# TRAINING PLAN FOR MEDICAL CENTER LAUNDRY

## Fall 1999

**STUDENTS- Donald and Sam**

**TRAINER (S)- Gloria Smith**

**SCHEDULE- Monday and Wednesday 9:00 to 11:00**

**CONTACT PERSON(S) - Frank Smith**

**PHONE NUMBER -716-2011**

**SPECIAL INSTRUCTIONS** – Donald needs to be reminded to speak slowly for others to understand him.

### ACTIVITIES AND TIMELINES

**9:00** - Students report to room 112, gather CBVT folder, and board the bus.

**9:20** - Students arrive at the main entrance. The bus drops them off at the Reynolds Tower. They take the elevator to the sub-basement. SB is the button they push on the elevator. Independently they sign-in, put on their uniform, find their work station and begin work. If they do not find any work they are to find Frank or Ian and get their supplies. The job coach checks to make sure that they have reported and are busy working. In developing their independence they are not given direct supervision.

**10:55** - Students stop work. Leave area clean. Discard uniform in dirty clothes hamper. Sign out. Get snack.

**11:00** - They take elevator #22 to the Main floor. Using the crosswalk they walk over to the bus. The job coach checks to make sure both students have boarded the bus and then returns to school.

#### **Possible Job Assignments -**

- Package clean wash cloths in plastic bags. Tie bags shut and load on laundry carts. Two bags to a cart.
- Sort scrub uniforms according to size.
- Fold exam robes.
- Sort baby laundry.
- Pack laundry bags into one bag and load on laundry carts. (one per cart)

**11:20** - Students return their CBVT folders to room 112. Students return to their 4th period class

COMMUNITY BASED VOCATIONAL TRAINING

Winston-Salem/Forsyth County Schools

FUNCTIONAL ASSESSMENT - PORTFOLIO INFORMATION

NAME Ronald Duck BIRTHDATE 10/23/82 SS# 453-98-5421

SITE Wake Forest Baptist Medical Center CONTACT PERSON Frank Smith

DATES (start/end) 9/15/99 DAYS/TIMES 12/15/99

JOB COACH Gloria Smith SITE PHONE # 782-9536

JOB RESPONSIBILITIES / DUTIES - (Description)

Bagging Wash clothes and tying closed, loading laundry cart

PERFORMANCE -

Strengths -

Try his best, very eager to work, gets along w/ co-workers

Weaknesses -

Has hard time staying on task - wants to talk to everyone but is getting better. Has problem remembering to sign in/out.

Production Rate -

Slow. Worked at a slow place to cut down on mistakes

Quality -

Improving from poor to good.

Improvements Made -

Production rate picked up ~ staying on task for longer period of time. Finding way around the hospital

Job Coach Comments - more independently.

See above.

Student comments in regard to this training experience -

"I really liked working w/ Ronald. My favorite job was filling the laundry bag."

This form should be completed by the job coach at the end of each training site. The information collected is essential for the student portfolio and resume. It is the intent of this form to help analyze the student's vocational strengths and to assist him/her as they make career choices.

## ANECDOTAL RECORDS

NAME Donald Duck SCHOOL Forsyth Vocational High  
 SITE Wake Forest University SCHOOL YEAR 1999-2000  
Baptist Medical Center

DATE	COMMENTS
9-20-99	Donald was very distracted by co-workers. Had to remind him to quit talking.
9-27-99	Donald tried hard to tie the bags but needs <u>lots</u> of practice.
10-4-99	Can not tie bags on his own. Coach broke down job steps to assist him in learning.
10-10-99	Donald is very friendly & wants to talk to everyone. Had to redirect him to his <sup>task xxx times</sup>
10-15-99	Showing improvement in tying the bags but still making many mistakes.
10-20-99	Donald is so eager to please he is rushing through his work. - Kept reminding him to slow down.
10-27-99	Donald is learning to "sign in" on a computer. Completed this hand over hand.
11-5-99	Donald is really trying hard but still not "slowing down."
11-15-99	Had to give one on one assistance to assure quality control.

The purpose of this form is to provide documentation for the Department of Labor. This form should reflect the need for job training. The comments should refer to incidents of inappropriate behavior, having to redo the student's work, type of needed supports, and special adaptations needed to complete the work.

# WORK EXPERIENCE SUMMARY

Community Based Non-Paid Vocational Training Experiences  
Winston-Salem / Forsyth County Schools



**NAME:** *Donald Duck*  
**GRADUATION YEAR:** *2001*      **BIRTHDATE:** *10/23/82*  
**HIGH SCHOOL:** *Forsyth Vocational High School*  
**COURSE OF STUDY:** *Occupational Degree*

<b>TRAINING SITE:</b>	<i>Wake Forest Baptist Medical Center ~ Laundry</i>
<b>CONTACT PERSON:</b>	<i>Frank Smith</i>
<b>DATE STARTED / ENDED:</b>	<i>September 15, 1999 – December 15, 1999</i>
<b>DAYS / TIMES:</b>	<i>Monday and Wednesday 9:00 to 11:00</i>
<b>JOB COACH:</b>	<i>Gloria Smith</i>
<b>JOB DESCRIPTION:</b>	<i>Bagging washcloths and tying closed, loading cart</i>
<b>STRENGTHS:</b>	<i>Enthusiastic, eager to learn, puts forth best effort</i>
<b>WEAKNESSES:</b>	<i>Tying bag closed, staying on task, signing in/out</i>
<b>PRODUCTION RATE:</b>	<i>Slow – worked at slow speed to ensure accuracy.</i>
<b>QUALITY:</b>	<i>Good</i>
<b>IMPROVEMENTS MADE:</b>	<i>Learned how to find way within the hospital to work area. Production rate increased with practice.</i>
<b>STUDENT COMMENTS:</b>	<i>"I really liked working with Ronald. My favorite job task was filling the laundry bag."</i>

<b>TRAINING SITE:</b>	<i>Chick-Fil-A</i>
<b>CONTACT PERSON:</b>	<i>Dave Thomas</i>
<b>DATE STARTED / ENDED:</b>	<i>February 3, 1999 – May 3, 1999</i>
<b>DAYS / TIMES:</b>	<i>Tuesday and Thursday 11:00 to 1:00</i>
<b>JOB COACH:</b>	<i>Betty Smith</i>
<b>JOB DESCRIPTION:</b>	<i>Cleaning dining room, refilling drinks, keeping condiment area clean and supplied, &amp; greeting customers</i>
<b>STRENGTHS:</b>	<i>Friendly, following directions</i>
<b>WEAKNESSES:</b>	<i>Unsteady hands when pouring drinks</i>
<b>PRODUCTION RATE:</b>	<i>Slow</i>
<b>QUALITY:</b>	<i>Good (except for refilling drinks)</i>
<b>IMPROVEMENTS MADE:</b>	<i>Learned to judge when condiments needing refilling and where supplies were stored</i>
<b>STUDENT COMMENTS:</b>	<i>"The chicken is really good &amp; I like the people."</i>



NAME: *Donald Duck*

<b>TRAINING SITE:</b>	<i>Piedmont Delivery</i>
<b>CONTACT PERSON:</b>	<i>Frank Smith</i>
<b>DATE STARTED / ENDED:</b>	<i>September 1998 – December 1998</i>
<b>DAYS / TIMES:</b>	<i>Tuesday and Thursday 9:00 – 11:00</i>
<b>JOB COACH:</b>	<i>Tiny Tim</i>
<b>JOB DESCRIPTION:</b>	<i>Roll newspaper, slide in plastic bag &amp; load on cart</i>
<b>STRENGTHS:</b>	<i>Stays on task, follows directions, cooperative</i>
<b>WEAKNESSES:</b>	<i>Slow</i>
<b>PRODUCTION RATE:</b>	<i>Below average</i>
<b>QUALITY:</b>	<i>Excellent</i>
<b>IMPROVEMENTS MADE:</b>	<i>Production rate showing improvement</i>
<b>STUDENT COMMENTS:</b>	<i>"It was hard!"</i>

<b>TRAINING SITE:</b>	<i>Food Bank</i>
<b>CONTACT PERSON:</b>	<i>Fran Smith</i>
<b>DATE STARTED / ENDED:</b>	<i>February 1998 to May 1998</i>
<b>DAYS / TIMES:</b>	<i>Wednesday and Friday 11:30 to 1:30</i>
<b>JOB COACH:</b>	<i>Tina Smith</i>
<b>JOB DESCRIPTION:</b>	<i>Remove old label off can and tape on new one</i>
<b>STRENGTHS:</b>	<i>Eager to work &amp; organizing work station</i>
<b>WEAKNESSES:</b>	<i>Working with the tape</i>
<b>PRODUCTION RATE:</b>	<i>Average</i>
<b>QUALITY:</b>	<i>Good</i>
<b>IMPROVEMENTS MADE:</b>	<i>Handling the tape</i>
<b>STUDENT COMMENTS:</b>	<i>"It is fun tearing the papers off."</i>

<b>TRAINING SITE:</b>	<i>K.J. 'S Kiddieland</i>
<b>CONTACT PERSON:</b>	<i>Debbie Jones</i>
<b>DATE STARTED / ENDED:</b>	<i>September 1997 to December 1997</i>
<b>DAYS / TIMES:</b>	<i>Tuesday and Thursday 9:00 to 11:00</i>
<b>JOB COACH:</b>	<i>Andrea Anderson</i>
<b>JOB DESCRIPTION:</b>	<i>Help clean tables, interact with students</i>
<b>STRENGTHS:</b>	<i>Wonderful rapport with children</i>
<b>WEAKNESSES:</b>	<i>None noted</i>
<b>PRODUCTION RATE:</b>	<i>Average</i>
<b>QUALITY:</b>	<i>Good</i>
<b>IMPROVEMENTS MADE:</b>	<i>Working independently</i>
<b>STUDENT COMMENTS:</b>	<i>"The babies like me!"</i>

# DEPARTMENT OF LABOR GUIDELINES

The following section was reprinted with permission from the handbook:  
*MEETING THE NEEDS OF YOUTH WITH DISABILITIES*  
*UNIVERSITY OF MINNESOTA*  
*US DEPARTMENT OF EDUCATION*  
*OFFICE OF SPECIAL EDUCATION*

# Questions and Answers

The U.S. Departments of Labor and Education issued new guidelines in September 1992, which apply to students with disabilities in nonemployment relationships. A nonemployment relationship occurs as part of the vocational exploration, assessment, and training components of CBVE programs. This section presents many of the questions frequently asked about these new guidelines. Each question includes an answer developed by the U.S. Department of Education in collaboration with officials from the U.S. Department of Labor's Wage and Hour Division.

## Requirements for Participation

1. *Which students may participate in community-based vocational education under these guidelines for non-employment relationships?*

Students who meet state guidelines for special education may participate in community-based vocational education if it is determined appropriate for them.

2. *How is it determined which students might need community-based vocational education?*

The determination should be based on the individual student's needs taking into account the student's preferences and interests. Community-based vocational education would be considered a major change in placement for most students and would require a change in the IEP. The education agency must invite the student to any meetings considering transition services or participation in community-based vocational training.

3. *Does the term "physical and mental disabilities" mean that students with learning disabilities are excluded?*

No. Learning disabilities can have their origin in physical or mental disabilities. However, participation in community-based vocational education should not be determined by disability group but rather by individual needs and preferences.

4. *The criteria in the guidelines indicate that community-based vocational education is for individuals for whom employment is "not immediately obtainable." What does this mean?*

The "not immediately obtainable" language was placed in the criteria to ensure that students would not be placed in the exploration, assessment, or training components of community-based vocational education if they were capable of obtaining employment at or above the minimum wage level. Community-based vocational programs are organized educational activities intended to prepare students for paid employment while they are in school.

5. *The criteria in the guidelines also indicate that community-based vocational education is intended for students who will need "intensive on-going support" to perform in a work setting. Does this mean that it is intended for students with more severe disabilities?*

Community-based vocational education is intended for those students with more severe disabilities. However, the level of severity must be based on skills and behaviors necessary to function in a work setting. Examples of ongoing support services include job redesign, environmental adaptations, personal assistance services, transportation, and social skills training (Rehabilitation Act Amendments of 1992, Senate Report 102-357, p. 24).

## Documentation Issues

6. *What vocational options should be available to students whose needs wouldn't be considered severe?*

Community-based vocational education is not intended to replace vocational education, work study, or other vocational training and employment programs. It is intended to be an option made available to students to expand the capacity of education agencies to assist each student to achieve employment objectives.

7. *Can these guidelines apply to adults with disabilities who are utilizing vocational rehabilitation services?*

The Departments of Education and Labor intended for these guidelines to be used only for youth with disabilities as defined by the Individuals with Disabilities Education Act. However, the U.S. Department of Labor and the National Rehabilitation Facilities Coalition have reached a similar agreement which would apply to adults with disabilities.

8. *What type of documentation is needed?*

It is important in community-based vocational education programs to document that all participants – the student, the parent or guardian, the employer, and instructional staff – understand that:

- 1) If at any point the community-based vocational activity is no longer a learning experience, it can not be considered a nonemployment relationship;
- 2) The community-based vocational program must meet all the requirements outlined in the guidelines for nonemployment relationships; and
- 3) Students are not entitled to employment at the worksite where they are receiving instruction and training.

Three types of documentation must be employed to meet the requirements of these guidelines: 1) an *IEP* reflecting vocational instruction and training goals and objectives relevant to the community-based vocational experience; 2) a *letter of agreement* outlining the DOL/ED requirements listed above and signed by all participants; and 3) *ongoing case notes* (i.e. attendance records, progress reports).

9. *Does the IEP eliminate the need to adhere to other laws governing child labor?*

Technically, child labor laws do not apply where there is not an employment relationship. However, it is highly recommended that educators adhere to child labor laws with regard to hazardous working conditions. Instruction and training in occupations which involve the use of machinery such as deli slicing machines, trash compactors, and bread dough kneading machines have been known to cause serious injury. Child labor laws provide guidance which can assist education personnel in determining whether a job is hazardous.

10. *Do these guidelines from the U.S. Department of Labor supersede individual State Departments of Labor regulations?*

No. It is important that community-based vocational education programs comply with both U.S. Department of Labor regulations and State Department of Labor regulations. Where the two do not agree, the regulations with the most stringent requirements for protecting individuals in work settings must apply.

11. *Is special or extra liability coverage for students required?*

Community-based vocational education is considered part of the student's individualized education program. In nonemployment relationships, the worksite is perceived as an extension of the school. In other words, the student is pursuing instructional objectives in a work setting. Since these students are not employees, they are not eligible for the usual workman's compensation or insurance coverage provided to employees. If the student is a paid employee of the business, then the employer is responsible for offering him or her the same liability coverage offered to other employees. If the student's participation in workplace activity can be considered instructional and part of a nonemployment relationship, then the school may be responsible for liability coverage. Generally, the same insurance and liability policies which apply to other off-site school experiences (i.e. athletic events, field trips) should apply. Each school district must work out their own policies regarding liability.

12. *Do reports have to be made to the U.S. Department of Labor and/or the U.S. Department of Education?*

No. It is not necessary to make reports to the U.S. Department of Labor or the U.S. Department of Education. However, adequate records documenting your programs' compliance with the criteria for nonemployment relationships must be maintained. In the event of a Department of Labor investigation of your program, this information must be made available to the Department of Labor.

13. *Can we share information from the community-based vocational program with vocational rehabilitation agencies?*

Yes. Information from the CBVE program can be shared with other agencies as long as confidentiality procedures are followed.

14. *How should issues regarding confidentiality be addressed?*

CBVE programs should follow those procedures typically followed with regard to confidential information. These procedures are outlined in section 300.560-300.576 of the IDEA regulations and are incorporated into both state and local policies and procedures.

15. *What is meant by the term "under the general supervision" of public school personnel?*

What this means is that the public school or education agency has primary responsibility for the community-based education program. Under IDEA, failure to deliver free appropriate educational services constitutes a violation of the rights of students with disabilities. This phrase places responsibility for ensuring that CBVE programs meet this mandate squarely on the shoulders of public school personnel. While different agencies or groups may deliver these educational services, public school personnel must act as the central agency overseeing the program.

16. *How might educators document meeting the general supervision criteria?*

Educators can document the general supervision criteria by developing the student's IEP. If a third party, such as a community-based rehabilitation program, is being utilized to carry out the provisions of the IEP, it should be so noted. The education agency must ensure that these guidelines are fully understood and will be followed by the provider.

## Program Supervision

17. *What are the implications of the "continued and direct supervision" requirement for educators and employers?*

Student participation in CBVE programs is considered as a valid part of a student's instructional program. As such, he or she is expected to be closely supervised by school staff or employees of the business. Direct supervision can include: 1) one-to-one instruction, 2) small group instruction, 3) supervision in close proximity, and 4) supervision in frequent, regular intervals. Supervision in frequent, regular intervals is permitted when the goal is to assess ability to work independently or to demonstrate mastery of the vocational skill.

18. *Is it necessary for someone to monitor the student at all times?*

Students in CBVE programs are to be monitored at all times. However, exactly how closely a student needs to be monitored in a community-based work setting must be determined on an individual basis. The various components of CBVE could require a variety of monitoring strategies depending on the goals and objectives outlined in the IEP. For example, vocational exploration and vocational assessment may require closer monitoring than the training component when the student may be working towards more independence in job performance.

19. *What educational qualifications and/or certificate must education staff have in order to provide supervision in CBVE programs as the education agency's representative?*

It is the responsibility of state and local education agencies to determine the qualifications necessary for education staff providing supervision in CBVE programs.

20. *Would vocational assessment be required to determine a student's interests and preferences?*

A formal vocational assessment may not be required to ascertain a student's preferences and interests if other alternatives are appropriate. However, as part of the overall decision making process, needs for support services or assistive technology should also be identified. These needs may be determined through ongoing assessment procedures inherent in the various components of community-based vocational education.

21. *Is it necessary that the program follow sequential order (i.e. exploration, assessment, training)?*

No. It is not necessary that the CBVE program follow a prescribed order. Given the nature of the student's needs, any of the three components may be deleted. It is only necessary that the CBVE program follow logical, generally agreed upon instructional best practices. For example, assessment and exploration usually would not follow training in one job classification.

22. *Is it necessary that the vocational goals and objectives in the IEP specify exact site placements?*

No. It is possible for the IEP to identify only general goals and objectives to be pursued (i.e., job clusters to explore or conduct assessments in; assessments of general work behavior skills; training in a specific occupation). The IEP should, however, expressly limit the amount of time students will spend at any one site or in any one distinguishable job classification. Additional written agreements with parents, students, and employers should reflect the exact location and document the specific nature of the education and training involved.



23. *Does the IEP team have to reconvene for multiple vocational explorations, assessments, and training?*

No. It is not generally necessary to reconvene the IEP team for multiple vocational explorations, assessments, and training. The vocational IEP objectives and goals can be written broadly enough to incorporate these experiences.

24. *What is meant by the phrases "clearly distinguishable occupation" and "clearly distinguishable job classification"?*

The word "occupation" refers to a specific profession or vocation generally engaged in as a source of livelihood. Occupation and job classification are meant to be synonymous. Examples of occupations are shipping and receiving clerk, custodian, and painter. Often occupations are confused with specific work activities or work stations which may be integral components of specific occupations. For example, work as a building custodian involves sweeping, emptying trash, and mopping. Each of these work activities must be considered as part of the clearly distinguishable occupation of custodian. If a student has received all allowable hours of non-paid CBVE in the job of school custodian, she should not be moved to a new site for a separate experience as a non-paid office building custodian.

25. *Given these guidelines, could an employer move students around to different work stations or occupational areas not specified in their written agreement?*

No. As stated earlier, goals and objectives for the student have been outlined in the IEP and written agreements between the student, parent, employer, and school personnel detail specific activities for the community vocational experience. Thus, the community-based vocational experience can be considered a valid educational experience under the supervision of school personnel. Employers must feel free to remove students from any work activity if they determine that removal is necessary for safety or other reasons. However, under no circumstances should the student be placed in a work station or occupational area not specifically outlined in the written agreement.

26. *How will students receive academic credits for community-based education?*

How students receive academic credit for work done in CBVE programs is left to the discretion of state and local education agencies. Many education agencies allow course credit for these community experiences since they are the means by which students achieve vocational goals and objectives identified in their IEPs. Frequently, the policy for academic credit in CBVE programs will be consistent with the one used for vocational education programs available to the general population.

27. *Do these guidelines refer to programs under special education and/or vocational education?*

It does not matter whether the CBVE program is offered through special education or vocational education. However, students participating in CBVE programs under these guidelines for nonemployment relationships must be youth with disabilities as defined by the Individuals with Disabilities Education Act.

28. *Do these guidelines apply to work during the summer?*

Yes. These guidelines may apply to summer CBVE programs as long as they are under the general supervision of school personnel. Many students have individualized instructional programs that call for an extended-year educational program. Other students may simply elect to enroll in summer school.

# The Educational Relationship vs. the Employment Relationship

29. *What is the difference between an educational relationship and an employment relationship?*

In an employment relationship, the student is actually providing services that are of immediate benefit to the employer. The student may be completing assignments normally completed by regular employees. As a result of these activities, vacant paid positions in the business may remain unfilled and regular employees may be displaced or relieved of their normally assigned duties. In an educational relationship, the student engages in work activities as part of an organized educational activity designed to benefit the student. The guidelines on implementing CBVE programs consistent with the FLSA outline the criteria for making the distinction between an employment relationship and a valid educational experience. If it is determined that a student's involvement in community-based vocational education constitutes an employment relationship rather than part of an organized educational activity, then the participating business or school can be held responsible for full compliance with the FLSA regulations. This would include compliance with the FLSA's minimum wage and overtime pay provisions.

30. *What is the distinction between benefit to student vs. benefit to employer?*

A number of distinctions have been made between benefit to the employer and benefit to the student with regard to CBVE programs (Pumpian, Lewis, & Engel, 1986). Benefit to the employer occurs when the employer recognizes an immediate advantage by having the CBVE student working on the premises. An immediate advantage can be described in terms of increased profitability or production for the business. Benefit to the student occurs when the CBVE program can be considered a valid educational experience for the student. The courts and experts in the field suggest that for CBVE to represent an educationally valid experience the following instructional practices should be implemented:

- 1) Students receive adequate orientation and instruction before performing new tasks.
- 2) The student's goals and objectives to be met in the community-based education program are clearly defined.
- 3) Activities in the community-based setting relate directly to student goals and objectives.
- 4) The student's activities in the CBVE program are closely monitored.
- 5) Records of the student's progress are maintained.
- 6) The necessary support and time for students to develop proficiency at new tasks are provided.

31. *What is the educator's role in assuring that regular employees will not be displaced by the student trainee in the workplace?*

The community experience must be primarily for the benefit of the student. Also, regular employees must not be displaced or relieved of assigned duties and vacant positions should not go unfilled. Two strategies are available to educators for ensuring that this criterion is met. First, the educator can confirm that all parties – the employer, the student, and the parents – understand that students in the CBVE program must not displace regular employees. An agreement documenting this understanding should be signed by all involved. Secondly, those who provide direct supervision to the student at the worksite may observe when employee displacement and other violations are occurring and take steps to correct the situation.



32. *If the activity is ordinarily not performed by employees and yet is beneficial to the business, can the student perform the activity?*

The student should either not perform the activity or be paid appropriate wages. Although regular employees have not been displaced or relieved of assigned duties, the student is still providing services which are of benefit to the business. Therefore, an employment relationship exists between the student and the employer. This would not be the case if the activity were of no benefit to the employer and consisted of "busy-work" designed to develop or improve a student's skills. For example, reorganizing materials awaiting shipment into sets of five would not constitute an employment relationship if the business did not ship the materials in this manner.

33. *Can students accept an offer of paid employment at a worksite where they were placed for community-based education?*

Yes. Students may accept an offer of paid employment at a worksite where they received instruction and training. The student would then become an employee of the business and an employment relationship would ensue. This means that the employer is responsible for full compliance with the FLSA, including minimum wage and overtime pay provisions.

34. *Could the student be paid less than the minimum wage?*

Yes. Employment below the minimum wage rate is permitted in instances when a worker's disabilities impair their ability to perform the job. This special minimum wage rate is based on the productivity of the worker with disabilities as compared to the productivity of a worker without disabilities. Employees must apply to the U.S. Department of Labor for authority to employ workers with disabilities at these special minimum wage rates.

# United States Department of Education

## Office of Special Education and Rehabilitative Services

Dear Colleague:

The Departments of Education and Labor have collaborated to promote opportunities for educational placements in the community for students with disabilities while assuring that applicable labor standards protections are strictly observed.

Pursuant to the Individuals with Disabilities Education Act (IDEA), individualized education programs are developed to provide students with disabilities an opportunity to learn about work in realistic settings and thereby help such students in the transition from school to life in the community. Since the affirmation of students' rights to an appropriate free public education in 1975, many students with disabilities have benefitted from participation in vocational education programs in their public schools. Students with more severe disabilities, however, have experienced fewer benefits from participation in such programs. Alternative, community-based, and individualized education and training programs have emerged to meet their needs.

Our Departments share an interest in promoting educational experiences that can enhance success in school-to-work transition and the prospects that these students become effective, productive workforce participants and contributors to their community. At the same time, these students must be afforded the full protection of the nation's labor laws and not be subject to potential abuse as they start this transition through community-based educational experiences.

Existing Department of Labor guidelines which define "employees" for purposes of applying the requirements of the Fair Labor Standards Act (FLSA) do not specifically address community-based education programs for students with disabilities. To assist program administrators in developing programs or making placements that do not create questions about the establishment of an employment relationship between the students and participating businesses in the community, the Employment Standards Administration (Department of Labor), and the Offices of Vocational and Adult Education, and Special Education and Rehabilitative Services (Department of Education) have developed the following guidance.

### Statement of Principle

*The U.S. Departments of Labor and Education are committed to the continued development and implementation of individual education programs, in accordance with the Individuals with Disabilities Education Act (IDEA), that will facilitate the transition of students with disabilities from school to employment within their communities. This transition must take place under conditions that will not jeopardize the protections afforded by the Fair Labor Standards Act to program participants, employees, employers, or programs providing rehabilitation services to individuals with disabilities.*

## Guidelines

Where ALL of the following criteria are met the U.S. Department of Labor will NOT assert an employment relationship for purposes of the Fair Labor Standards Act.

- *Participants will be youth with physical and/or mental disabilities for whom competitive employment at or above the minimum wage level is not immediately obtainable and who, because of their disability, will need intensive on-going support to perform in a work setting.*
- *Participation will be for vocational exploration, assessment, or training in a community-based placement worksite under the general supervision of public school personnel.*
- *Community-based placements will be clearly defined components of individual education programs developed and designed for the benefit of each student. The statement of needed transition services established for the exploration, assessment, training, or cooperative vocational education components will be included in the students' Individualized Education Program (IEP).*
- *Information contained in a student's IEP will not have to be made available; however, documentation as to the student's enrollment in the community-based placement program will be made available to the Departments of Labor and Education. The student and the parent or guardian of each student must be fully informed of the IEP and the community-based placement component and have indicated voluntary participation with the understanding that participation in such a component does not entitle the student-participant to wages.*
- *The activities of the students at the community-based placement site do not result in an immediate advantage to the business. The Department of Labor will look at several factors.*
  - 1) *There has been no displacement of employees, vacant positions have not been filled, employees have not been relieved of assigned duties, and the students are not performing services that, although not ordinarily performed by employees, clearly are of benefit to the business.*
  - 2) *The students are under continued and direct supervision by either representatives of the school or by employees of the business.*
  - 3) *Such placements are made according to the requirements of the student's IEP and not to meet the labor needs of the business.*
  - 4) *The periods of time spent by the students at any one site or in any clearly distinguishable job classification are specifically limited by the IEP.*
- *While the existence of an employment relationship will not be determined exclusively on the basis of the number of hours, as a general rule, each component will not exceed the following limitation during any one school year:*

*Vocational exploration*  
*Vocational assessment*  
*Vocational training*

*5 hours per job experienced*  
*90 hours per job experienced*  
*120 hours per job experienced*

- *Students are not entitled to employment at the business at the conclusion of their IEP. However, once a student has become an employee, the student cannot be considered a trainee at that particular community-based placement unless in a clearly distinguishable occupation.*

It is important to understand that an employment relationship will exist unless all of the criteria described in this policy guidance are met. Should an employment relationship be determined to exist, participating businesses can be held responsible for full compliance with FLSA, including the child labor provisions.

Businesses and school systems may at any time consider participants to be employees and may structure the program so that the participants are compensated in accordance with the requirements of the Fair Labor Standards Act. Whenever an employment relationship is established, the business may make use of the special minimum wage provisions provided pursuant to section 14(c) of the Act.

We hope that this guidance will help you achieve success in the development of individualized education programs.

ROBERT R. DAVILA  
Assistant Secretary  
Office of Special Education  
and Rehabilitative Services  
U.S. Department of Education

CARI M. DOMINGUEZ  
Assistant Secretary  
Employment Standards  
Administration  
U.S. Department of Labor

BETSY BRAND  
Assistant Secretary  
Office of Vocational and  
Adult Education  
U.S. Department of Education

# ACKNOWLEDGEMENTS

Information from the following school systems has contributed greatly to the development of our Community Based Vocational Training program.

Many thanks to those school systems and others that have helped pave the way for our exceptional students in Winston-Salem/Forsyth County.

*Cobb County Schools – Marietta, Georgia*  
*Cumberland County Schools – Fayetteville, North Carolina*  
*Shelby-Cleveland County Schools – Shelby, North Carolina*  
*Wake County Public Schools ~ Cary, North Carolina*

*“BECAUSE I DO NOT TALK SO WELL,  
DON’T ASSUME I HAVE NOTHING TO  
SAY. AND BECAUSE I DO NOT MOVE SO  
WELL, DON’T ASSUME THAT I CAN’T  
GET THERE.  
FIND ME,  
REACH ME...  
AND TEACH ME.”*

*UNKNOWN*

# **Finding Jobs for Young People with Disabilities (Griffin and Sherron, 1996)**

## **Chapter 7-Life Beyond the classroom**

Job development techniques have been described in the literature to secure jobs for adults with disabilities in supported employment placements. (Garner and Callahan, 1988, give an overview of the concepts of Job Development and important aspects related to Job development. These are not included in chapter 7, but are important to consider as supplemental information.

Representation strategies (to Job Development) are the values, procedures, and methods used by employment training personnel as they interact with potential employers on behalf of an individual or group of individuals with disabilities for the purpose of securing integrated employment opportunities.

### **Slide 2**

#### **Job Development**

Garner defines job development as the process of locating and securing employment opportunities for individuals with disabilities.

Job development includes the following activities

### **Slide 3**

#### **Job Development Activities**

Concepts of community based employment-*Job development activities*

1. Selection of appropriate representation strategies
2. Making contact with employers
3. Analyzing potential benefits or liabilities of a prospective work site.
4. Negotiating employment arrangements that are suited to the needs of the individual and the employer
5. Arranging the necessary support services as negotiated with the employers
6. Finalizing any necessary details that will affect the success of individuals in supported employment.

### **Slide 4**

#### **Job development considerations-Gardner-Callahan**

- 1) Leave your human service vocabulary at home
- 2) Dress appropriately for the type of business your visiting and the individuals your meeting
- 3) Be prepared to respond to questions, objections and stalls



- 4) Relationships are an important part of the job development process
- 5) Promote the worth of individuals status, value and worth and protect their interests and needs

#### **Slide 5**

#### **Four Activities of Job Development**

The authors describe four components of job development as

- 1) conducting a community job market screening
- 2) Developing a marketing program(publications and strategy)
- 3) Making specific employer contacts
- 4) Completing a job analysis

#### **Slide 6**

#### **Screening**

Screening-information gathering about community and economic-work possibilities

#### **Slide 7**

#### **Marketing**

Developing and organizing your materials into a package for employer presentation

#### **Slide 8**

#### **Job Analysis—Environmental Analysis**

Job analysis-screening the work and related environments, which include task requirements, job characteristics

#### **Slide 9**

#### **Value of services**

*Griffin and Sherron, 1996.*

The authors support the concept that staff need to share in the purpose, methods and procedures of Community based programming that interface with business. Teachers need to be able to answer or address questions that might include:

- 1) Programs Philosophy to securing and supporting job placement for individuals with disabilities
- 2) How is student participation encouraged in the placement process
- 3) What materials will be used to represent the program and student to the business world?

**(Slide 10 and 11 optional)**

**Slide 10**

**Presumption of Employability**

Presumption of employability and zero reject are behind the philosophy and underlying concepts of any dedicated employment programs for people with disabilities.

Presumption of employability-

All persons with disabilities should be provided with the opportunity for employment in integrated community settings. The availability of these opportunities is not contingent upon any prerequisite skill levels or developmental competencies.

**Slide 11**

**Zero Reject**

Zero reject- a value

No one should be denied access to supported employment services because of the severity of their disability

**Slide 12**

**Services offered**

How will these services benefit the organization?

What services are offered through the community-based program?

How can the program meet the needs of employers?

What businesses have used your services?

What will it cost the employer

How successful has your program been?

**Slide 13**

**Job seeker expectations**

(creating individualized positions)-

Active participation of student

Are approaches programmatic or individualized?

What are my options as a student?

What are my options as a business?

How will you do your job matching?

How will you identify abilities, preferences and needs of students?

**Slide 14**

**Business Contacts**

Identifying Business Contacts

Surveying and Developing networks

Conducting a community job market screening allows employment specialists to

Investigate and make contacts in a cross section of industries and positions within a business community

Hints

Join local chamber of commerce

Establish job network system with rehabilitation personnel or other school personnel (workforce development, VR SE Providers)

Network with family and friends to expand employer information.

Business to business leads

Making Business Contacts

Research indicates that the relationship of the organizations are more important than the existence of actual job openings.

*Drop in visits-Cold calls*, help wanted signs might be suited for the unannounced visit. The cold call might also be used to schedule a future time for an employer presentation.

*Mailings-letters of introduction* -need to be followed up with visit or telephone call to schedule future appointment

### **Slide 15**

#### **Recommended Script**

Recommended script for cold calls

Greet the individual

Identify who you are

Identify whom you represent

Briefly state the nature of the service

Briefly state how the service may benefit or interest the employer

Request an informational interview to learn more about

### **Slide 16**

#### **Employer Presentations /Business meeting Guidelines (pages 172-175)**

Developing a presentation for an employer

Set the stage

Cover the basics

Address concerns and questions

Wrap up

Unusual Occurrences

Being kept waiting

Rude reception

Periods of silence

Interruptions

Being called away

Skill enhancement

Practice makes perfect

### **Slide 17**

#### **Job Analysis**

##### Defining quality

- 1) Opportunities that may be provided for interactions
- 2) Working conditions
- 3) Opportunities for long term employment
- 4) Enhancing features of the work site
- 5) Work expectations
- 6) Internal controls available
- 7) In house training and support
- 8) Marketable skills

### **Slide 18**

- 9) Availability if entry level jobs
- 10) Employer agreement to employee work expectations
- 11) A positive view of the employer within the community
- 12) The degree to which the employer is open to innovative training and adaptation strategies
- 13) Et proximity of the employment site to community resources and transportation
- 14) The possible support that can be received from co-workers.

### **Slide 19**

#### **Analyzing job activities**

- 1) visit the job site to observe and begin a detailed job analysis
- 2) Observe the way in which current employees perform the various routines
- 3) Have someone teach you the job routines your going to do
- 4) Perform the routines that are novel to you until you feel comfortable
- 5) Decide on the need for detailed job analysis and task analysis

### **Slide 20**

- 6) Write task analyses for the jobs your going to teach
- 7) Obtain approval or verification from employer on methods chosen
- 8) Identify natural cues and consequences in work routines
- 9) Set start dates and begin training

### **Slide 21**

#### **Core work routines**

Tasks and job routines that occur every day without daily interruptions (what needs to be done every day)

**Slide 22**

**Episodic work routines**

Job routines that occur irregularly during the day or week, Taking out the garbage, adding paper to a printer, cleaning the fryer

**Slide 23**

**Job related routines**

vital for success

Clocking in, washing hands before handling food

**Slide 24**

**Work Site Culture**

Accommodations to the worksite culture

Awareness of the expectations held by the employer and the informal rules of working held by the employees.

*Job Restructuring* involves the examination of the essential functions of the job including the core and the episodic routines and re distributing the tasks of the job.

*Job carving* involves examining the key components of several jobs and creating a new position that individuals with disabilities may then be trained to do.

**Slide 25**

**Job carving**

Determine student needs and desires

Research target businesses, including personnel, training, retention, competition, and technical issues

Visit sample target businesses

Inventory activities of typical workers performing target tasks

Observe corporate culture, including rules and rituals

**Slide 26**


**Job Carving**

Task analyze duties and determine consumer capabilities, training, and assistance needs

Negotiate with employer

Teach and refine tasks

Build on typical supports and relationships



Fade  
Maintain consultative role

## Finding Jobs for Young People with Disabilities

Life Beyond the Classroom  
Chapter 7

1

## Job Development

- Garner defines job development as the process of locating and securing employment opportunities for individuals with disabilities.

2



## Job Development Activities














- Selection of appropriate representation strategies
- Making contact with employers
- Analyzing potential benefits or liabilities of a prospective work site
- Negotiating employment arrangements that are suited to the needs of the individual and the employer
- Arranging the necessary support services as negotiated with the employers
- Finalizing any necessary details that will affect the success of individuals in supported employment

## Job Development Considerations



- Leave your human service vocabulary at home
- Dress appropriately for the type of business you are visiting and the individuals you are meeting
- Be prepared to respond to questions, objections, and stalls
- Relationships are an important part of the job development process
- Promote the worth of individuals status, value, and worth and protect their interests and needs








4



**Four Activities of Job Development**



- 



 ■ Conducting a community job market screening
- 


 ■ Developing a marketing program (strategy)
- 


 ■ Making specific employer contact
- 


 ■ Completing a job analysis














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





**Screening**

- 






 ■ Information gathering and the identification of possible employment opportunities rather than securing a job placement are the goals of a community job market screening



6










**Marketing**





- 



 ■ Marketing literature, brochure which identifies service
- 


 ■ Telephone contacts
- 


 ■ Canvassing-cold calls
- 


 ■ Employer presentation

<ul style="list-style-type: none"> <li> -establish rapport</li> <li> -introduce the programs</li> <li> -identify the students</li> </ul>	<ul style="list-style-type: none"> <li> -explain the models</li> <li> -appeal to interests</li> <li> -wrap up</li> </ul>
---	---

7



**Job Analysis-environmental analysis**

- 






 ■ Gather as much information about the job and related environments as possible.

-  -task requirements
-  -work environment
-  -work communications
-  -job characteristics

8



**Value of Services**

- Staff needs to share in the purpose, methods, and procedures of community based programming that interface with business.

9

**Presumption of Employability**

- All persons with disabilities should be provided with the opportunity for employment in integrated community settings.

10

**Zero Reject**

- No one should be denied access to employment services because of the severity of their disability

11

**Services Offered**

- How will these services benefit the organization?
- What services are offered through the community-based program?
- How can the program meet the needs of employers?
- What businesses have used your services?
- What will it cost the employer?
- How successful has your program been?

12

## Job Seeker Expectations

- Active participation of student
- Are approaches programmatic or individualized?
- What are my options as a student?
- What are my options as a business?
- How will you do your job matching?
- How will you identify abilities, preferences, and needs of students?

13

## Business Contacts

- Join local chamber of commerce
- Establish job network system with rehabilitation personnel or other school personnel (workforce development, VR SE Providers)
- Network with family and friends to expand employer information
- Business to business leads

14

## Recommended Script

- Greet the individual
- Identify who you are
- Identify whom you represent
- Briefly state the nature of the service
- Briefly state how the service may benefit or interest the employer
- Request an informational interview to learn more

15

## Employer Presentations /Business meeting Guidelines pages 172-175

- Develop and role play an employer presentation for your community based worksite
- Developing a presentation for an employer
  - Set the stage
  - Cover the basics
  - Address concerns and questions
- Wrap up

16

### Job Analysis

Defining quality

- Opportunities that may be provided for interactions
- Working conditions
- Opportunities for long term employment
- Enhancing features of the work site
- Work expectations
- Internal controls available
- In-house training and support
- Marketable skills

17

### Job Analysis (cont)

- Availability of entry level jobs
- Employer agreement to employee work expectations
- A positive view of the employer within the community
- The degree to which the employer is open to innovative training and adaptation strategies
- The proximity of the employment site to community resources and transportation
- The possible support that can be received from co-workers

18

### Analyzing Job Activities


- Visit the job site to observe and begin a detailed job analysis
- Observe the way in which current employees perform the various routines
- Have someone teach you the job routines you are going to do
- Perform the routines that are novel to you until you feel comfortable
- Decide on the need for detailed job analysis and task analysis

19

### Analyzing Job Activities (cont)

- Write task analyses for the jobs you are going to teach
- Obtain approval or verification from employer on methods chosen
- Identify natural cues and consequences in work routines
- Set start dates and begin training


20



### Core Work Routines

- Tasks and job routines that occur every day without daily interruptions


21



### Episodic Work Routines

- Job routines that occur irregularly during the day or week. (Taking out the garbage, adding paper to a printer, cleaning the fryer.)


22



### Job Related Routines

- Vital for success. (Clocking in, washing hands before handling food.)


23



### Work Site Culture


- Awareness of the expectations held by the employer and the informal rules of working held by the employees.

24

 **Job Carving**

- Determine student needs and desires
- Research target businesses, including personnel, training, retention, competition, and technical issues
- Visit sample target businesses
- Inventory activities of typical workers performing target tasks
- Observe corporate culture, including rules and rituals

25

 **Job Carving (cont)**

- Task analyze duties and determine consumer capabilities, training, and assistance needs
- Negotiate with employer
- Teach and refine tasks
- Build on typical supports and relationships
- Fade
- Maintain consultative role

26

**Slide 1**

**Occupational Course of Study (presentation based on work of Dr. Nellie Aspel, , 2000)**

A wide array of exit options are available to students in most states and in North Carolina. North Carolina like many other states continues to further develop and expand educational standards, requirements, and opportunities for students with and without disabilities.

**Slide 2**

**Work=**

- Higher standard of living
- Opportunity
- Independence

Without a high school diploma students with disabilities have:

- 1) Lower job prospects
- 2) Are not candidates for military service
- 3) Have limited post secondary educational opportunities.

**Slide 3**

**Development of the OCS**

Demonstration Project  
UNC-North Shelby  
Local Sanctioned Occupation Diploma's  
Differentiated Diploma committee  
SBE Concept Approval  
Curriculum Writing Teams  
Dissemination of Draft to EC staff in LEA's  
Statewide Regional Meetings  
Curriculum Revision  
SBE Public hearings  
SBE state approval  
Implementation

Policies around exit options available to students with disabilities have been changing since 1995. A 1999 survey by Guy (etal, 1999) indicated 25 states were revising or were considering revising exit options for students with disabilities. Currently three states Alabama, New Mexico, and Colorado, and now North Carolina have the Occupational Course of Study available.

**Slide 4**

**Slide 8**

**OCS Requirements**

Foreign Language – not required (local decision)  
Arts Education – not required (local decision)  
Electives – not required (local decision)  
No Exit Exam

**Slide 9**

**Occupational Course of Study**

**Slide 10**

**Alignment with Best Practices**

NC Standard Course of Study  
School to Work Opportunities Act  
SCANS Skills  
Career Education  
Career Development

The OCS is aligned with the NC standard course of study and requires the same amount of credits in addition to the hands of work experience integrated into Occupational Prep classes. S-T-W alignment occurs in the components of school-based activities connecting activities and work-based activities. SCAN skills covers the essence of skills identified as essential to the elements of a good worker including the values of a strong work ethic.

**Slides 11 & Slide 12**

**Assumptions**

Vocational Assessment  
Experiential hands on learning  
Self-determination  
Functional academics  
Interagency cooperation  
Increasing amounts of time in the community  
Paid work experience

Vocational Assessment is important to career decision- making. An experiential hand on learning is an important need for students with disabilities. Self-determination is vital to successful transition planning and the obtainment of competitive employment. The application of functional academics to work settings is important to future career success. Interagency cooperation is important for successful career development. Students should spend increasing amounts of time in the community as they approach graduation.

Students who have paid work experience in school are more likely to obtain paid work after graduation.

**Slides 13-17**

**Occupation English**

Functional reading  
Written expression  
Expressive communication  
Receptive communication  
Media and Technology

**Slide 18**

**Occupational Math Competencies**

Computation  
Financial management  
Time  
Measurement  
Independent Living

**Slide 19**

**Classroom Instructional Strategies**

Functional Materials and Curricula-LCCE  
Role-playing  
On-going case scenarios  
Integration of skills  
Homework  
Self-management  
Problem solving

**Slide 20**

**Inclusion**

Inclusion in the mainstream  
Inclusion in the community  
Work means inclusion in the community.



**Slide 21**

**Occupational Preparation Requirements**

**Slide 22**

**Occupational Preparation Competency Goals**

1. Self-Determination
2. Career Development
3. Job Seeking Skills
4. Work Behaviors, Habits, and Skills in Personal Management
5. Work Behaviors, Habits, and Skills in Job Performance
6. Interpersonal Relationship skills
7. Completion of 360 Hours of Competitive employment

**Slide 23**

**Competency Goal 7**

Students need a job that holds their interest and fits their need. It is at this point when the responsibility will fall upon the student to prove that he/she has mastered the skills to maintain the job and exhibit the appropriate behaviors in the workplace.

**Slide 24**

**School-Based Training Activities**

- Vocational Assessment Activities
- School factories
- School-Based Work Enterprises
- WFDE Hands on experiences
- Job fairs
- VR Work Adjustment
- Job clubs

**Slide 25**

**Work-Based Training Activities**

- Community based Training (mobile crews, enclaves)
- Situational Assessments
- Internships
- Job shadowing
- Apprenticeships
- Co-op programs
- Part-time employment
- Volunteer experiences
- Community service projects

**Slide 26**

**What Needs to Happen Now?**

Educators need to continue to focus on providing meaningful education for all of our students, including students with disabilities.

**Slide 27**

**What is Still to Come?**

Students in the occupational course of study will graduate in a few years. We need to monitor post school outcomes and determine if we are providing effective training to ensure they succeed in the workforce.

## **Occupational Course of Study**

**Work???????????**

### **Work=**

- Higher standard of living
- Opportunity
- Independence

## **Development of the OCS**

- Demonstration Project
- UNC-North Shelby
- Local Sanctioned Occupation Diploma's
- Differentiated Diploma committee
- SBE Concept Approval
- Curriculum Writing Teams
- Dissemination of Draft to EC staff in LEA's
- Statewide Regional Meetings
- Curriculum Revision
- SBE Public hearings
- SBE state approval
- Implementation

## **Which students should consider the OCS?**

- Students who are being served in the exceptional children's program
- Students who have a post-school outcome goal for employment after graduation.
- Students whose post-school needs are not being met by the NC standard course of study or who which to pursue a course of study that provides functional academics and hands-on vocational training.

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### **The Occupational Course of Study is not:**

- **An appropriate curriculum for ALL students who cannot obtain a high school diploma through one of the other courses of study**
- **A program designed to remove certain students from the accountability standards**
- **A classroom-textbook driven course of study**

### **OCS Requirements**

- **English: 4 courses**
- **Mathematics: 3 courses**
- **Science: 2 courses**
- **Social Studies: 2 courses**
- **Foreign Language: not required**
- **computer skills: Computer Efficiency as specified in IEP**

### **OCS Requirements**

- **Occupational Preparation: 4 courses(6 credits) 300 hrs of School-Based training**
- **240 hours for work-based training and 360 hrs of paid employment**
- **Health and PE course: 1 course**
- **Career/technical: 4 credits**
- **Arts education: not required(local decision)**

### **OCS Requirements**

- **Electives: Not required (local decision)**
- **Career Portfolio**
- **Completion of IEP Objectives**
- **No exit exam**

## **Occupational Course of Study**

- **English: Occupational English I-II-III-IV**
- **Math: Occupational Math I-II-III**
- **Science: Life Skills Science**
- **Social Studies: Government/US History and Self Advocacy/problem solving**
- **Occupational Preparation I-II-III-IV**
- **Health/PE**
- **Career Technical: 4 credits**

## **Alignment**

- **NC Standard Course of Study**
- **School to Work Opportunities Act**
- **SCANS Skills**
- **Career Education**
- **Career Development**
- **Elements of Work Ethics**

## **Assumptions**

- **Vocational Assessment is important to career decision-making.**
- **Experiential hands on learning is an important need for students with disabilities**
- **Self-determination is vital to successful transition planning and the obtainment of competitive employment**

## **Assumptions**

- **The application of functional academics to work settings is important to future career success**
- **Interagency cooperation is important for successful career development**
- **Students should spend increasing amounts of time in the community as they approach graduation**
- **Students who have paid work experience in school are more likely to obtain paid work after graduation**

## **Occupation English**

- **Functional reading**
- **Written expression**
- **Expressive communication**
- **Receptive communication**
- **Media and Technology**

## **Competency goal 1. Functional Reading Skills**

- **Functional reading strategies**
- **Functional vocabulary**
- **Functional reading**
- **Reading comprehension**
- **Map reading reading labels**
- **Reading advertisements**
- **Leisure reading**

## **Competency Goal 2: Functional Written Language Skills**

- **Print/cursive upper and lower case manuscript letters**
- **Written simple and compound sentences**
- **Use basic capitalization, punctuation, and grammar rules**
- **Spell simple common words**
- **Write simple functional items and simple paragraphs**
- **Write letters**

## **Competency goal 3; Functional Expressive Communication Skills**

- **Use proper grammar when speaking**
- **Telephone skills**
- **Self-advocacy skills**
- **Oral interpreting skills**
- **Conversational skills**
- **Oral presentation regarding portfolio**

- **Competency goal 4: Functional Receptive Communication Skills**
- **Competency 5; Functional Computer Skills**

### **Occupational Math Competencies**

- **Computation**
- **Financial management**
- **Time**
- **Measurement**
- **Independent Living**

### **Classroom Instructional Strategies**

- **Functional Materials and Curricula-LCCE**
- **Role-playing**
- **On-going case scenarios**
- **Integration of skills**
- **Homework**
- **Self-management**
- **Problem solving**

### **Inclusion**

- **Inclusion in the mainstream means inclusion in the community-work means inclusion in the community.**

## **Occupational Preparation Requirements**

- **Occupational Preparation I-1 credit**
- **Occupational Preparation II-2 credits**
- **Occupational Preparation III-2 credits**
- **Occupational Preparation IV-1 credit**
- **School Based Training-300 hours**
- **Work-Based Training-240 hours**
- **Competitive Employment-360 hours**
- **Career Placement Portfolio**

## **Occupational Preparation Competency Goals**

- **1. Self-Determination**
- **2. Career Development**
- **3. Job Seeking Skills**
- **4. Work Behaviors, Habits, and Skills in Personal Management**
- **5. Work Behaviors, Habits, and Skills in Job Performance**
- **6. Interpersonal Relationship skills**
- **7. Completion of 360 Hours of Competitive employment**

## **Competency Goal 7**

- **Obtains and maintains a competitive employment position in an integrated community setting at or above minimum wage (with or without supported employment in chosen career pathway)**
- **synthesizes and applies all skill areas learned in previous Occupational courses**

## **School-Based Training Activities**

- **Vocational Assessment Activities**
- **School factories**
- **School-Based Work Enterprises**
- **WFDE Hands on experiences**
- **Job fairs**
- **VR Work Adjustment**
- **Job clubs**



## **Work-Based Training Activities**

- **Community based Training (mobile crews, enclaves)**
- **Situational Assessments**
- **Internships**
- **Job shadowing**
- **Apprenticeships**
- **Co-op programs**
- **Part-time employment**
- **Volunteer experiences**
- **Community service projects**

## **What Needs to Happen Now?**

## **What is still to come?**

## **OCCUPATIONAL PREPARATION I**

*Strands:* Self-Determination, Personal Management, Interpersonal Relationship Skills, Career Development, Job Seeking Skills, and Job Performance

**COMPETENCY GOAL 1:** The learner will develop self-determination skills to participate in transition planning and making a successful adjustment to adult life.

**COMPETENCY GOAL 2:** The learner will actively participate in career development activities (e.g. awareness, exploration, and planning) to determine a career goal.

**COMPETENCY GOAL 3:** The learner will develop the job-seeking skills necessary to secure employment in the chosen career pathway.

**COMPETENCY GOAL 4:** The learner will develop the work behaviors, habits, and skills in the area of personal management needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 5:** The learner will develop the work behaviors, habits, and skills in the area of job performance needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 6:** The learner will develop the interpersonal relationship skills needed for success in the workplace.

## **OCCUPATIONAL PREPARATION II**

*Strands:* Self-Determination, Personal Management, Interpersonal Relationship Skills, Career Development, Job Seeking Skills, and Job Performance

**Competency Goal 1:** The learner will develop self-determination skills for participating in transition planning and making a successful adjustment to adult life

**COMPETENCY GOAL 2:** The learner will actively participate in career development activities (e.g. awareness, exploration, and planning) to determine a career goal.

**COMPETENCY GOAL 3:** The learner will develop the job seeking skills necessary to secure employment in chosen career pathway.

**COMPETENCY GOAL 4:** The learner will develop the work behaviors, habits, and skills in the area of personal management needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 5:** The learner will develop the work behaviors, habits, and skills in the area of job performance needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 6:** The learner will develop the interpersonal relationship skills needed for success in the workplace.

### **OCCUPATIONAL PREPARATION III**

*Strands:* Self-Determination, Personal Management, Interpersonal Relationship Skills, Career Development, Job Seeking Skills, and Job Performance

**COMPETENCY GOAL 1:** The learner will develop self-determination skills for participating in transition planning and making a successful adjustment to adult life.

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**COMPETENCY GOAL 4:** The learner will develop the work behaviors, habits, and skills in the area of personal management needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 5:** The learner will develop the work behaviors, habits, and skills in the area of job performance needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 6:** The learner will develop the interpersonal relationship skills needed for success in the workplace.

### **OCCUPATIONAL PREPARATION IV**

*Strands:* Self-Determination, Personal Management, Interpersonal Relationship Skills, Career Development, Job Seeking Skills, and Job Performance

**COMPETENCY GOAL 1:** The learner will develop self-determination skills for participating in transition planning and making a successful adjustment to adult life.

**COMPETENCY GOAL 2:** The learner will actively participate in career development activities (e.g. awareness, exploration, and planning) to determine a career goal.

**COMPETENCY GOAL 3:** The learner will develop the job seeking skills necessary to secure employment in chosen career pathway.

**COMPETENCY GOAL 4:** The learner will develop the work behaviors, habits, and skills in the area of personal management needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 5:** The learner will develop the work behaviors, habits, and skills in the area of job performance needed to obtain, maintain, and advance in chosen career pathway.

**COMPETENCY GOAL 6:** The learner will develop the interpersonal relationship skills needed for success in the workplace.

**COMPETENCY GOAL 7:** The learner will complete 360 hours of successful competitive employment by graduation.

## **OCCUPATIONAL ENGLISH I**

*Strands:* Functional Reading, Written Language, Expressive and Receptive Communication, and Media and Technology

**COMPETENCY GOAL 1:** The learner will obtain and demonstrate functional reading skills.

**COMPETENCY GOAL 2:** The learner will obtain and demonstrate functional written language skills.

**COMPETENCY GOAL 3:** The learner will obtain and demonstrate functional expressive communication skills.

**COMPETENCY GOAL 4:** The learner will obtain and demonstrate functional receptive communication skills.

**COMPETENCY GOAL 5:** The learner will obtain and demonstrate functional computer skills.

## **OCCUPATIONAL ENGLISH II**

*Strands:* Functional Reading, Written Language, Expressive and Receptive Communication, and Media and Technology

**COMPETENCY GOAL 1:** The learner will obtain and demonstrate functional reading skills.

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**COMPETENCY GOAL 4:** The learner will obtain and demonstrate functional receptive communication skills.

**COMPETENCY GOAL 5:** The learner will obtain and demonstrate functional computer skills.

## **OCCUPATIONAL ENGLISH III**

*Strands:* Functional Reading, Written Language, Expressive and Receptive Communication, and Media and Technology

**COMPETENCY GOAL 1:** The learner will obtain and demonstrate functional reading skills.

**COMPETENCY GOAL 2:** The learner will obtain and demonstrate functional written language skills. (full block and modified block), and write a business letter

**COMPETENCY GOAL 3:** The learner will obtain and demonstrate functional expressive communication skills.

**COMPETENCY GOAL 4:** The learner will obtain and demonstrate functional receptive communication skills.

**COMPETENCY GOAL 5:** The learner will obtain and demonstrate functional computer skills.

## **OCCUPATIONAL ENGLISH IV**

*Strands:* Functional Reading, Written Language, Expressive and Receptive Communication, and Media and Technology

**COMPETENCY GOAL 1:** The learner will obtain and demonstrate functional reading skills.

**COMPETENCY GOAL 2:** The learner will obtain and demonstrate functional written language skills.

**COMPETENCY GOAL 3:** The learner will obtain and demonstrate functional expressive communication skills.

**COMPETENCY GOAL 4:** The learner will obtain and demonstrate functional receptive communication skills.

**COMPETENCY GOAL 5:** The learner will obtain and demonstrate functional computer skills.

**Objectives:**

## **OCCUPATIONAL MATHEMATICS I**

*Strands:* Computation, Financial Management, Time and Management, Independent Living, Technology

**COMPETENCY GOAL 1:** The learner will read, write, model, and compute numbers less than 1,000 using relevant and authentic independent living and employment concepts.

**COMPETENCY GOAL 2:** The learner will demonstrate an understanding of financial management skills necessary for independent living and employment.

**COMPETENCY GOAL 3:** The learner will demonstrate an understanding of basic time and measurement skills needed for independent living and employment.

**COMPETENCY GOAL 4:** The learner will demonstrate an understanding of mathematics skills needed for independent living.

**COMPETENCY GOAL 5:** The learner will demonstrate the selection and use of a calculator.

## **OCCUPATIONAL MATHEMATICS II**

*Strands:* Computation, Financial Management, Time and Management, Independent Living, and Maps, Graphs and Charts.

**COMPETENCY GOAL 1:** The learner will compute with whole numbers, decimals, and fractions.

**COMPETENCY GOAL 2:** The learner will apply basic skills to financial management problems for independent living and employment.

**COMPETENCY GOAL 3:** The learner will calculate time and measurement problems for independent living and employment using computation skills.

**COMPETENCY GOAL 4:** The learner will apply decision making and budgeting skills to independent living.

**OCCUPATIONAL MATHEMATICS III**

*Strands:* Computation, Financial Management, Time and Management, Independent Living.

**COMPETENCY GOAL 1:** The learner will apply computational skills.

**COMPETENCY GOAL 2:** The learner will apply mathematics to financial management and employment skills.

**COMPETENCY GOAL 3:** The learner will apply basic skills to time measurement activities in school, community, and on the job.

**COMPETENCY GOAL 4:** The learner will apply computation skills needed for independent living.

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## Self-Determination

### Slide 2

“When the World seems large and complex we need to remember that great world ideals all begin in some home neighborhood.” –Konrad Adenauer

Self-Advocacy began in Sweden, through Bengt Nirje’s concept that children and adults with disabilities could and should have a role in their own choices (Shapiro, 1993)

### Slide 3

#### Origins

Self-determination as well as Self-advocacy both grew out of Nirje’s normalization principle. That individuals with disabilities have the right to experience the patterns and conditions of every day life within the norms and patterns of the mainstream society. Nirje expanded the concept of normalization by teaching self-advocacy skills to adults in the sixties and early seventies.

### Slide 4

#### Self-Advocacy

According to Lehr and Taylor(1986), self-advocacy means

“to speak for yourself, to make decisions for yourself, to know what your rights are and how to stick up for yourself when your rights are being violated or diminished”

Self-determination has become a focal point of research, an emphasis of legislation and an important focal point of professional and national organizations. Can it be defined, probably not, can it be understood, most definitely. Does it have any benefits, yes individuals who are self-determined or have been taught self-determination skills have a higher quality of life, are more successful and have a higher rate of employment. Most people agree on what components are necessary for self-determined behavior, however many definitions still exist.

### Slide 5

#### Wehmeyer’s Definition

SD refers to :

“Acting as the primary causal agent in one’s life and making choices and decisions regarding one’s quality of life free from undue external influence or interference” (Wehmeyer, 1996, p.22).



**Slide 6**

**Martin & Marshall's Definition**

Self-determined individuals are those who “know how to choose - they know what they want and how to get it. From an awareness of personal needs, self-determined individuals choose goals, then doggedly pursue them. This involves asserting an individual’s presence, making his or her needs known, evaluating progress toward meeting goals, adjusting performance and creating unique approaches to solve problems. (1995)

**Slide 7**

**Field & Hoffman's Definition**

“the ability to define and achieve goals based on a foundation of knowing and valuing oneself” (Field & Hoffman, 1994).

**Slide 8**

**Webster's definition**

1 determination according to one’s own mind; 2 free will, 3 the right of a people to choose their own form of government (Webster’s Dictionary, 1990).

**Slide 9**

**SD Definitions address SD as . . .**

- ∪ a civil right
  - ∪ a set of skills
  - ∪ an internal drive or personal characteristic
  - ∪ communicative or social relationships
- (Hughes & Agran, 1998)

**Slide 10**

**Component skills of Self-determination**

- ∪ choice-making
- ∪ decision-making
- ∪ problem solving
- ∪ independent living
- ∪ goal setting & attainment
- ∪ self-management
- ∪ self-instruction
- ∪ self-awareness
- ∪ self-understanding
- ∪ self-advocacy
- ∪ self-efficacy
- ∪ internal locus of control

(Wehmeyer, 1996)

Most definitions have some of these as basics leading to self-determined behavior or concentrate on teaching some aspects or skill in some of these areas.

### **Slide 11**

#### **Essential Characteristics of Self-Determined Behavior** -Wehmeyer, 1996

- ∪ Behavioral autonomy
  - a concept which involves emotional separation from parents, the development of a sense of personal control over one's life, the establishment of a personal value system and the ability to execute behavioral tasks which are needed in the adult world
- ∪ Self-regulated behavior
  - a response system that enables individuals to examine their environment and their repertoires of responses for coping with those environments to make decisions about how to act, to act, and to evaluate the desirability of the outcomes of the action-Whitman-1990

### **Slide 12**

#### **Essential Characteristics of Self-Determined Behavior**

- ∪ Acting In a psychologically empowered manner.
  - A term referring to the multiple dimensions of perceived control, including the domains of personality(locus of control) cognition (personal efficacy), and motivation
- ∪ Self-realization
  - using a reasonably accurate, knowledge of themselves and their strengths and limitations

### **Slide 13**

#### **Who is SD for?**

#### **Everyone or Just for Some?**

Who might self determination not be for? Small group discussion possible at this point.

- ∪ People with mild disabilities?
- ∪ People 18 and older?
- ∪ People who have certain skills?
- ∪ People who can communicate their wants and needs through symbolic language, e.g., speech, sign, written, etc.?
- ∪ People who have not been declared incompetent by the courts?
- ∪ People who demonstrate an ability to make wise decisions?

#### **Slide 14**

### **According to the literature, Promoting SD has been focused on ....**

- ∪ Students and adults with MR
- ∪ Students with LD
- ∪ Transition aged students with disabilities
- ∪ Adults with disabilities
- ∪ Students with significant disabilities
- ∪ Young children with disabilities
- ∪ Students with serious emotional disability

#### **Slide 15**

### **For students with SPD Use of Preference Assessment Techniques**

- ∪ Employment choices through job sampling records (Hutchins & Renzaglia, 1990).
  - students participate in a variety of jobs throughout their H.S. years
  - careful performance data is maintained
  - based on the student's job sampling performance data, the teacher matches the student's job choice to his her preferences, interests, and performance.

#### **Slide 16**

### **Brown, Appel,Corsi,and Wenig, (1993) infusing choice in day to day activities**

1. Students can choose within an activity
2. Students can choose between two activities
3. Students can decide when to do an activity
4. Students can select the person with which to do an activity
5. Students can decide where to do an activity
6. Students can refuse to participate in a planned activity,
7. Students can choose to end an activity at a planned time

#### **Slide 18 & 19**

### **Why Self Determination?**

#### **... for several reasons.**

- ∪ What is the ultimate goal of education?
- ∪ Because people with disabilities are demanding it.
- ∪ Because it is a right highly valued by ALL Americans
- ∪ Because it is mandated in several key pieces of legislation.

### **Slide 20**

#### **Also, research tells us**

Quality of life is related not just to a persons environment, but whether these factors constitute a major share of an individuals well being and whether or not the person has a sense of achievement, love and affection, and perceived freedom and degree of choice (Dalkley, 1972)

### **Slide 21**

#### **Policy**

- ∪ IDEA of 1990, 1997
- ∪ Rehabilitation Act of 1992, 1998

Two major laws that have influenced the development of self-determination principles are IDEA and the Rehab acts

### **Slide 22**

#### **Transition in IDEA**

- ∪ defines “transition services” as a coordinated set of activities that promote movement from school to post-school environments.
- ∪ Further - that the activities must match the student’s needs, preferences, and interests.

### **Slide 23**

#### **IDEA**

- ∪ Since 1990 - the student should have been being invited to the IEP meetings and/or planning meetings
- ∪ Since 1997 - one year prior to the age of majority under State law, the student shall be informed of his or her rights that will transfer to the child on reaching the age of majority

IDEA requires that services be designed within an outcome-oriented process, that bases current services on the students desired outcomes and results (Wehmeyer, Agran, & Hughes, 1998). These outcomes must be based on students preferences and needs. The regulations also state that if the meeting is to consider transition services then the school must invite the student.

Mitaug, Wolman and Campeau(1992) point out that the mandated position of IDEA is, for the first time, that student preferences drives the delivery of educational services. In order to achieve student involvement through the transition mandate of equal partnership in planning, students need to become self-determined. “To accomplish this, students need to learn to solve problems and make decisions, provide informed consent, identify and evaluate goals and objectives and be able to advocate on their own behalf,

negotiate and compromise, and provide some leadership (Wehmeyer, Agran, & Hughes, 1998)

#### **Slide 24**

##### **Rehab Act of 1992**

- ∪ Disability is a natural part of the human experience and in no way diminishes the rights of individuals to live independently, enjoy self-determination, make choices, contribute to society, pursue meaningful careers, and enjoy full inclusion and integration in the economic, political, social, cultural, and educational mainstream of American society. [Sec. 2(a)(3)(A-F)].

The Rehab Act of 1992 adds the concept of choice both in the philosophy and in the concept of having the individual with disabilities guide their rehabilitation plan.

#### **Slide 25**

##### **OSERS SD Initiative - 1988**

- ∪ It is the ultimate goal of education, (Halloran, 1993).
- ∪ OSERS supported 26 model demonstration projects to identify and teach skills necessary for SD.
- ∪ These projects explored various innovative approaches to improve SD skills and outcomes.

#### **Slide 26**

##### **An analysis of the projects revealed that curricula was developed to teach students to**

1. Evaluate skills
2. Recognize their limits
3. Set goals
4. Identify options
5. Accept responsibility
6. Communicate preferences and needs
7. Monitor and evaluate their progress

Data indicates that positive outcomes increased when students learned to make decisions, to be assertive, and to self-advocate(Sands & Wehmeyer, 1996)

#### **Slide 27**

##### **How?**

- ∪ If the goal of professionals in the field of education is to facilitate autonomous functioning of students with disabilities, attempts will need to be made to provide both skill training and opportunities for the exercise of self-determination to children at as early an age as possible. (Abery, 1992)

### **Slide 28**

#### **What are some methods that have been used?**

- ∪ Use of person-centered planning approaches
- ∪ Supporting youth with disabilities to actualize their dreams
- ∪ Developed SD curriculum for youth with physical disabilities

### **Slide 29**

#### **Methods (cont)**

- ∪ Used training in ethics and self-management for youth with SED
- ∪ Involving students in setting goals, self-evaluation, and making decisions
- ∪ Involving students in developing and implementing their IEPs

### **Slide 30**

#### **Common curricula topics**

- ∪ Evaluate their skills (self-assessment)
- ∪ Recognize their limits (self-awareness)
- ∪ Choice-making
- ∪ Set goals
- ∪ Identify options
- ∪ Accept responsibility
- ∪ Communicate their preferences and needs
- ∪ Monitor and evaluate their progress

### **Slide 31**

#### **Changing the Environment**

- ∪ The de facto power structure (i.e., parents, teachers, case managers, VR counselors, etc.) must begin to honor the choices of people with disabilities.

Ianocone and Stodden, (1987) identify practices that hinder the development of student involvement in the transition process, and stifle self-determination

*Structured dependence*-highly structured classrooms, limit opportunities for students to make choices and restrict the chances of learning independent living skills.

*Decision taking*- educators and parents continue to make decisions for the students limiting the ability to practice goal setting, decisions making and communication.

*Postsecondary irrelevance*-activities that are focused on are unrelated to vocational or post-school environments or outcomes

*Misguided reinforcement*-students are reinforced for behaviors or compliance and dependence rather than emphasis on independence

*Self-fulfilling expectations*- many educators hold low expectations for students, which limits positive outcomes

*Focus on disability*-transition process in many schools continues to focus on deficits instead of identifying and working on strengths

Ward (1988) contends that the developmental process and independent growth of individuals with disabilities is hindered because of the reliance on parents and overprotectiveness of a system that tends to overstructure and artificially develop environments around individuals with disabilities.

**Slide 32**

### **Self-Determination**

- ∪ Take the time to offer people choices and figure out what they want allowing them full participation in their IEP
- ∪ Teach people with disabilities new skills, teaching and improving in one or more of the SD component skills
- ∪ People around people with disabilities need to expect them to make their own choices and decisions
- ∪ Preference assessment for individuals with more severe disabilities.

### References

Field, S., & Hoffman, A. (1996) Steps to self-determination: a curriculum to help adolescents achieve their goals, Austin TX: PRO-ED

## Self-Determination

- ◆ “When the World seems large and complex we need to remember that great world ideals all begin in some home neighborhood.” – Konrad Adenauer

## Origins

- ◆ Self-determination as well as Self-advocacy both grew out of Nirje’s normalization principle(Nirje, 1972)

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### SD Definitions address SD as . . .



- ◆ a civil right
  - ◆ a set of skills
  - ◆ an internal drive or personal characteristic
  - ◆ communicative or social relationships
  - ◆ a systems change issue
- Hughes & Agran, 1998

### Skill Components of SD what behaviors make up self-determined behavior.

- |                             |                             |
|-----------------------------|-----------------------------|
| ◆ choice-making             | ◆ self-awareness            |
| ◆ decision-making           | ◆ self-understanding        |
| ◆ problem solving           | ◆ self-advocacy             |
| ◆ independent living        | ◆ self-efficacy             |
| ◆ goal setting & attainment | ◆ internal locus of control |
| ◆ self-management           |                             |
| ◆ self-instruction          | ● Wehmeyer, 1996            |

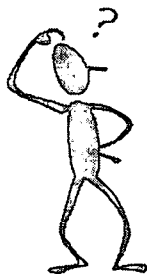
### Essential Characteristics of Self-Determined Behavior -Wehmeyer 1996

- ◆ Behavioral autonomy
- ◆ Self-regulated behavior

### Essential Characteristics of Self-Determined Behavior

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Brown, Appel, Corsi, and Wenig,  
(1993)infusing choice in day to  
day activities

- ◆ Infusing choice into everyday activities
  - 1. Students can choose within an activity
  - 2. Students can choose between two activities
  - 3. Students can decide when to do an activity
  - 4. Students can select the person with which to do an activity

**Brown, Appel, Corsi, and Wenig,  
(1993)infusing choice in day to  
day activities**

- 5. Students can decide where to do an activity
- 6. Students can refuse to participate in a planned activity,
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**Why Self Determination?**

**. . . for several reasons.**

- ◆ What is the ultimate goal of education?
- ◆ Because people with disabilities are demanding it.
- ◆ Because it is a right highly valued by ALL Americans
- ◆ Because it is mandated in several key pieces of legislation.

**Also, . . . research tells us**

- ◆ SD is highly correlated with a higher quality of life.
- ◆ Self-determined people achieve more positive adult outcomes

### Policy

- ◆ IDEA of 1990, 1997
- ◆ Rehabilitation Act of 1992, 1998

### Transition in IDEA

- ◆ defines “transition services” as a coordinated set of activities that promote movement from school to post-school environments.
- ◆ Further - that the activities **must match the student’s needs, preferences, and interests.**

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- ◆ It is the ultimate goal of education, (Halloran, 1993).
- ◆ OSERS supported 26 model demonstration projects to identify and teach skills necessary for SD.
- ◆ These projects explored various innovative approaches to improve SD skills and outcomes.

### OSERS Initiative

- ◆ Teach self evaluation
  - ◆ recognize limits
  - ◆ set goals
  - ◆ identify options
  - ◆ accept responsibility
  - ◆ communicate preferences and needs
  - ◆ evaluate personal progress
- 

### How

- ◆ If the goal of professionals in the field of education is to facilitate autonomous functioning of students with disabilities, attempts will need to be made to provide both skill training and **opportunities** for the exercise of self-determination to children at as early an age as possible. (Abery, 1992)

### What are some methods that have been used?

- ◆ **Use of person-centered planning approaches**
- ◆ **Supporting youth with disabilities to actualize their dreams**
- ◆ **Developed SD curriculum for youth with physical disabilities**

### Methods (cont)

- ◆ Use training in ethics and self-management for youth with SED
- ◆ Involving students in setting goals, self-evaluation, and making decisions
- ◆ Involving students in developing and implementing their IEPs

### Common curricula topics

- ◆ Evaluate their skills (self-assessment)
- ◆ Recognize their limits (self-awareness)
- ◆ Choice-making
- ◆ Set goals
- ◆ Identify options
- ◆ Accept responsibility
- ◆ Communicate their preferences and needs
- ◆ Monitor and evaluate their progress

### Changing the Environment



- ◆ The current power structure (i.e., parents, teachers, case managers, VR counselors, etc.) must begin to honor the choices of people with disabilities.

### Self-Determination

- ◆ Take the time to offer people choices and figure out what they want
- ◆ Teach people with disabilities new skills
- ◆ People around people with disabilities need to expect them to make their own choices and decisions
- ◆ Systems change, could be accomplished by giving vouchers directly to the individuals and letting them decide how to use it-TWWIA-1999

### Slide 1

#### **Teaching Self-Monitoring, Self-Evaluation, and Self-Reinforcement Strategies (Wehmeyer, Agran, Hughes 1998)**

Martin & Marshall (1997) indicate that transitioning youth that fail do not know what they want nor do they know how to obtain it. They are individuals that do not know how to set goals for themselves or advance their situation; they become or end up at the mercy of people in their surroundings. Martin & Marshall note that “we adapt educational environments to meet student needs but we do not teach students to control or adapt their own environments.

### Slide 2

#### **Success Behavior**

- ζ Successful individuals set goals for themselves and developed action plans to achieve these goals.
- ζ These action plans were implemented and followed.
- ζ The individuals evaluated their actions and determined how successful they were in achieving their goals.
- ζ If they did not achieve the desired level of success, they changed their plans of action. Mithaug (1998) conducted a literature review and identified four major clusters of success behavior. Mithaug felt that if these were the actions and skills of prominent individuals then why should these be the same skills, needed by people with disabilities. Without these skills people have little opportunity to be successful and end up continuously having low expectations for themselves.

### Slide 3

#### **Self-Regulated Behavior**

- ζ The skills listed previously are referred to as self-regulation strategies, and it is the lack of these skills that has been suggested as one of the greatest problems for students receiving special education services (Agran, Martin, & Mithaug, 1989; Mithaug et al., 1988).

Self-regulation allows students to cope with and adapt to change.

### Slide 4

#### **Self-Regulated Behavior (cont)**

- ζ Self-regulation skills empower students (Graham, Harris, & Reid, 1992) and enable them to truly take responsibility for their learning (Schuler & Perez, 1987).
- ζ Self-regulation has been suggested as the central concept in self-management (Karoly & Kanfer, 1977).

All individuals experience change in our environment, routines, or reaching our goals. Being able to control our responses to these changes instead of merely reacting allows us



to exert control over ourselves to exhibit a positive response to the changing environment.

### **Slide 5**

#### **Theoretical Basis for Self-Regulation**

ζ Mithaug (1993) suggested that individuals are often in flux between goals, or desired, states and existing, or actual, states. It is the acknowledgment of this discrepancy—the difference between what one has and what one wants—that provides the incentive for self-regulation and subsequent action.

The first step in problem solving is to acknowledge that a problem exists. Mithaug notes that individuals with disabilities often do little to change their situation. What they do attempt is usually inappropriate based on learned helplessness and low expectations.

### **Slide 6**

#### **Self-Regulation Strategies**

ζ Self-regulation strategies typically include goal setting, self-monitoring, self-evaluation, and self-reinforcement.

Goal setting should highlight the difference between current and desired outcomes. Self-management is an important part of goal setting as well as planning the ITP.

### **Slide 7**

#### **Self-Monitoring**

ζ Self-monitoring involves teaching a student to observe and record his or her own behavior.

ζ The student must learn to discriminate that the desired, or target, behavior did occur.

ζ The student must accurately record its occurrence.

Self-monitoring procedures will produce change without any other interventions, even if the student's records are not 100% accurate. What can you use to self-record counters, timers, pencil, and paper checklists?

### **Slide 8**

#### **Self-Evaluation**

ζ Involves the comparison of the behavior being monitored with the performance goal (Smith & Nelson, 97)

Self-evaluation informs the student as to whether he or she is meeting the desired goal.

1. It tells students what they have achieved.
2. Provides immediate feedback.
3. Allows them to set future goals.

### **Slide 9**

#### **Self-Reinforcement**

- ζ Self-reinforcement represents the major theoretical and procedural component of most conceptualizations of self-management and self-regulation (Brigham, 1989).
- ζ A number of researchers have suggested that self-reinforcement is as effective, if not more so, than teacher-delivered reinforcement (Deutsch Smith, 1989; Schloss & Smith, 1994).

Self-reinforcement involves a system in which students can reinforce their own behavior. Functionally, it involves two operations, discrimination and delivery. Has the desired behavior occurred? Can the student determine that a target behavior has occurred and can reinforcements be delivered to the student?

### **Slide 10**

#### **Self-Reinforcement**

- ζ Effective reinforcers may include self-generated verbal statements (e.g., “Good work Dante”), tally marks on a recording form to be exchanged later for a delayed reinforcer (e.g., 15 marks equal a trip to the movies), or an immediately awarded tangible reinforcer (e.g., baseball card, school supply, compact disc).

As long as a student can discriminate that the behavior has occurred, it can be used for transition activities, work production, and social skills.

### **Slide 11**

#### **Self-Regulation Programs**

The Adaptability Model consists of four components:

- ζ Decision making
- ζ Independent performance
- ζ Self-evaluation
- ζ Adjustment

The Adaptability Model was developed to promote self-determination and problem solving. The model was developed based on the need for autonomy and opportunity for students to become active members in education/decision making.

### **Slide 12**

#### **Self-Regulation Programs**

- ζ A student learning to work in a hotel or motel may determine the number of rooms he or she will clean independently.
- ζ Next, the student is taught to use one or more self-management strategies to guide or direct his or her work behavior. For example, the student may elect to use a checklist

to mark off each task completed in a room, picture cues, or self-instructions (i.e., self-directed verbal statements).

Decision-making involves teaching students how to set work goals then to develop a plan to achieve these goals. A contract is then developed.

#### **Slide 13**

### **Self-Regulation Programs**

ζ The student is taught to evaluate whether his or her goal was achieved. This is done by comparing the student's self-recordings with the stated goals.

While working on these tasks, students self-evaluate by monitoring and recording performance objectives set during decision-making. Students adjust their performance by using their self-evaluation to decide what to do next time.

#### **Slide 14**

### **Self-Regulation Programs**

ζ Adjustment skills are taught.

ζ If the student achieves success, then he or she can choose to keep the same goals or to increase the desired level of independence or productivity.

ζ If the student doesn't achieve the goal, a few options are taught.

This program seeks to operationalize self-management and self-regulation for students in the transition process.

#### **Slide 15**

### **Teaching Goal Setting**

ζ Suffice it to say in the present context that direct student involvement is critical. As suggested by Mithaug (1996), goals set should exceed the student's present level of performance but be feasible and within reach.

Initially students should set goals that are obtainable.

#### **Slide 16**

### **Goal Setting**

ζ Goals should be set for just-right matches that are within the student's capacity and for which an opportunity exists to pursue the goals.

Need to move from goals that are easier and obtainable to goals that are more challenging and not as easily or quickly obtainable.

### **Slide 17&18**

#### **Seven Step Process for Goal Setting (Smith and Nelson, 1997)**

- ζ Arrange a conference with the student, his or her parents, and relevant personnel.
- ζ Discuss with the student the purpose of the meeting and the importance of his or her input.
- ζ Discuss and resolve the differences regarding the discrepancy between what students want to achieve (i.e., their goal) and their current status.
- ζ Propose a solution (i.e., set the goal).
- ζ Determine the positive consequences for meeting the goal.
- ζ Develop a self-monitoring plan to assess the student's progress in meeting this goal.
- ζ It is recommended that a simple contract or agreement be developed and signed.

When might this 7-step sequence be used? What about this process makes it somewhat difficult to use?

### **Slide 19**

#### **Teaching Self-Reinforcement**

- ζ Identifying the target behavior and the criterion to be met.
- ζ Involve the student in identifying desired reinforcers.
- ζ A self-monitoring procedure needs to be developed.
- ζ The student needs to be taught to discriminate the target behavior and to record its occurrence.
- ζ The student is instructed to use the self-reinforcement procedure.

Many students with or without disabilities have limited experience in evaluating their own behavior. Will the student find the use of self-regulatory procedures reinforcing? Will self-feedback work?

### **Slide 20**

#### **Accurate Recording is Critical**

- ζ Errors in recording, either intentional or accidental, will not provide the student with correct information about his or her performance, will hinder the student's ability to reach his or her goals, and will eventually be discovered.

Don't want the self-recording to negate the situation or interfere with learning. Students need practice to improve their ability to record information. Can start with easier tasks, time on task, and class participation.

**Slide 21**

**Self-Reinforcement (cont)**

ζ The student is taught to deliver the rein-forcer to herself or himself after the target behavior is performed and recorded. Corrective feedback is provided, as needed. The last step involves teaching the student to set new behavioral criteria, as needed, as he or she gains competency.

Can gradually add routines in the workplace when the student starts staying on task, jobs done correctly, and completion of assigned tasks. Students should be involved in assuming more responsibility. Students need to be involved in defining, directing, and modifying their lives.

**Teaching  
Self-Monitoring,  
Self-Evaluation, and  
Self-Reinforcement Strategies**

**Wehmeyer, Agran, Hughes  
(1998) Teaching self-determination skills  
to students with disabilities**

**Success Behavior**

- ⌘ Successful individuals set goals for themselves and developed action plans to achieve these goals.
- ⌘ These action plans were implemented and followed.
- ⌘ The individuals evaluated their actions and determined how successful they were in achieving their goals.
- ⌘ If they did not achieve the desired level of success, they changed their plans of action.

**Self-Regulated Behavior**

⌘ The skills listed previously are referred to as self-regulation strategies, and it is the lack of these skills that has been suggested as one of the greatest problems for students receiving special education services (Agran, Martin, & Mithaug, 1989; Mithaug et al., 1988).

**Self-Regulated Behavior (cont)**

- ⌘ Self-regulation skills empower students (Graham, Harris, & Reid, 1992) and enable them to truly take responsibility for their learning (Schuler & Perez, 1987).
- ⌘ Self-regulation has been suggested as the central concept in self-management (Karoly & Kanfer, 1977).

## **Theoretical Basis for Self-Regulation**

⌘Mithaug (1993) suggested that individuals are often in flux between goal, or desired, states and existing, or actual, states. It is the acknowledgment of this discrepancy—the difference between what one has and what one wants—that provides the incentive for self-regulation and subsequent action.

## **Self-Regulation Strategies**

⌘Self-regulation strategies typically include goal setting, self-monitoring, self-evaluation, and self-reinforcement.

## **Self-Monitoring**

- ⌘Self-monitoring involves teaching a student to observe and record his or her own behavior.
- ⌘The student must learn to discriminate that the desired, or target, behavior did occur.
- ⌘The student must accurately record its occurrence.

## **Self-Reinforcement**

- ⌘Self-reinforcement represents the major theoretical and procedural component of most conceptualizations of self-management and self-regulation (Brigham, 1989).
- ⌘A number of researchers have suggested that self-reinforcement is as effective, if not more so, than teacher-delivered reinforcement (Deutsch Smith, 1989; Schloss & Smith, 1994).

### **Self-Reinforcement**

⌘Effective reinforcers may include self-generated verbal statements (e.g., "Good work Dante"), tally marks on a recording form to be exchanged later for a delayed reinforcer (e.g., 15 marks equal a trip to the movies), or an immediately awarded tangible reinforcer (e.g., baseball card, school supply, compact disc).

### **Self-Regulation Programs**

The model consists of four components:

- ⌘Decision making
- ⌘Independent performance
- ⌘Self-evaluation
- ⌘Adjustment

### **Self-Regulation Programs**

⌘A student learning to work in a hotel or motel may determine the number of rooms he or she will clean independently.

⌘Next, the student is taught to use one or more self-management strategies to guide or direct his or her work behavior. For example, the student may elect to use a checklist to mark off each task completed in a room, picture cues, or self-instructions (i.e., self-directed verbal statements).

### **Self-Regulation Programs**

⌘The student is taught to evaluate whether his or her goal was achieved. This is done by comparing the student's self-recordings with the stated goals.



### **Self-Regulation Programs**

- ⌘ Adjustment skills are taught.
- ⌘ If the student achieves success, then he or she can choose to keep the same goals or to increase the desired level of independence or productivity.
- ⌘ If the student doesn't achieve the goal, a few options are taught.

### **Teaching Goal Setting**

- ⌘ Suffice it to say in the present context that direct student involvement is critical. As suggested by Mithaug (1996), goals set should exceed the student's present level of performance but be feasible and within reach.

### **Goal Setting**

- ⌘ Goals should be set for just-right matches that are within the student's capacity and for which an opportunity exists to pursue the goals.

### **Seven Step Process for Goal Setting (Smith and Nelson, 1997)**

- ⌘ Arrange a conference with the student, his or her parents, and relevant personnel.
- ⌘ Discuss with the student the purpose of the meeting and the importance of his or her input.
- ⌘ Discuss and resolve the differences regarding the discrepancy between what students want to achieve (i.e., their goal) and their current status.
- ⌘ Propose a solution (i.e., set the goal).

### **Seven Step Process (cont)**

- ⌘ Determine the positive consequences for meeting the goal.
- ⌘ Develop a self-monitoring plan to assess the student's progress in meeting this goal.
- ⌘ It is recommended that a simple contract or agreement be developed and signed.

### **Teaching Self-Reinforcement**

- ⌘ Identifying the target behavior and the criterion to be met.
- ⌘ Involve the student in identifying desired reinforcers.
- ⌘ A self-monitoring procedure needs to be developed.
- ⌘ The student needs to be taught to discriminate the target behavior and to record its occurrence.
- ⌘ The student is instructed to use the self-reinforcement procedure.

### **Accurate Recording is Critical**

- ⌘ Errors in recording, either intentional or accidental, will not provide the student with correct information about his or her performance, will hinder the student's ability to reach his or her goals, and will eventually be discovered.

### **Self-Reinforcement (cont)**

- ⌘ The student is taught to deliver the reinforcer to him- or herself after the target behavior is performed and recorded. Corrective feedback is provided, as needed. The last step involves teaching the student to set new behavioral criteria, as needed, as he or she gains competency.

## Quiz One--Sped 6321

Name \_\_\_\_\_ Last Four Digits SS# \_\_\_\_\_

1. Describe three characteristics of person-centered planning along with three components of personal futures planning. From your own perspective how does person-centered planning overlap and relate to ITP and IEP development in your classroom or in the educational system? (10 pts)
2. How can educational systems improve choices and enhance self-determination of students with disabilities and their families?(5)
3. How does the definition of transition by the CEC, Division on Career Development and Transition (or does it) incorporate or embody the concept of self-determination? (5)
4. What are some ways that school systems can insure parent/guardian involvement in the transition process? (5)
5. Wehman describes nine guiding principles for Transition Implementation. Which of these principles would you consider the least important and why? Which of these would you consider the most important and why? (10)
6. What would you consider the most important prerequisites to Active Listening?(5)
7. Why is it important to involve communities in transition planning and program development?(5)
8. What are the historic roles that families have played in the development of services for individuals with disabilities and what do you see as the professional's responsibility in helping to overcome barriers that might exist in family-school collaboration efforts? (10)

## Quiz Two—Sped 6321

Name \_\_\_\_\_ Last 4 Digits of SS# \_\_\_\_\_

**Please answer 7 of the following questions. Answer each question should have minimally a 3-5-sentence paragraph answer, please no one-sentence answers, except for question 7.**

1. What does self-determination have in common with the concept of normalization?
2. What is self-determination?
3. How does self-determination differ from self-advocacy?
4. If you were working with a new teacher and you were ask how we can incorporate self-determination into our functional curriculum, what suggestions (tips) would you give him/her?
5. If you were a new teacher in a special education classroom what doubts might you have about teaching self-determination?
6. What present concerns do you have about the concept of self-determination and teaching self-determination?
7. Have you had a chance to visit the self-determination website?  
(<http://www.uncc.edu/sdsp/>)  
Yes \_\_\_\_\_ no \_\_\_\_\_ 3 points
8. What suggestions do you have for teaching self-determination to students at the late elementary age?
9. What are the major components of success behavior, and why are these behaviors important to students with disabilities?
10. Why is it difficult to teach self-determination to students with severe disabilities? And how can you incorporate strategies to teach self-determination to students with severe disabilities?
11. What is meant by the skill sets of self-determined behavior and what are the skill sets of self-determined behavior?

Dear Colleague:

The goal of this course, "*Interagency Collaboration*", is to explore interagency transition and supported employment services, supports, and outcomes for individuals with disabilities and their families. The goal is to be accomplished through a semester-long course using assigned course readings, guest speakers, lectures, applied in-class activities, quizzes, and practicum experiences with professionals employed in agencies providing interagency transition and supported employment services.

This packet includes a comprehensive set of materials designed to support the teaching of this course. The packet is divided into three sections: (1) a sample course syllabus/course assignments; (2) sample lecture notes and PowerPoint slides; and (3) a sample test bank.

# INTERAGENCY COLLABORATION COURSE

## Table of Contents

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**Course Syllabus and Assignments**  
**INTERAGENCY COLLABORATION**

## Course Description

**1.0 Goal Of Course:** Students participating in this course will explore interagency services, supports, and outcomes for individuals with disabilities and their families through course readings, guest speakers, lectures, applied in-class activities, quizzes, and practicum experiences with professionals employed in agencies providing interagency transition services.

**2.0 Relationship To Conceptual Framework:** This course contributes to developing excellent professionals by focusing on the strands and associated learning outcomes of knowledgeable, reflective and responsive teachers, and effective practitioners. Upon completion of this course, successful students will be able to:

1. Identify and implement effective and collaborative interagency practices among specific community services and supports relevant to individuals with disabilities and their families [CC1.K5, CC7.K1, CC7.K2, CC7.K4, CC7.K5, CC7.S1, CC7.S2, CC7.S3, MR4.K2, MR7.K1];
2. Identify and implement effective, collaborative, and culturally-sensitive practices for enhancing the involvement of individuals with disabilities and their families and respectful and beneficial relationships between families and professionals [CC1.K2, CC4.S6, CC7.K2, CC7.S4, MR4.K3, MR7.S1, MR5.K1];
3. Identify and implement effective and collaborative interagency transition planning and services driven by each individual student's wants and needs for post-school services and supports [CC1.S2, CC4.S10, CC7.K4, CC7.S5, MR4.K3, MR5.K1];
4. Identify and implement effective and collaborative curricula development and co-teaching practices in general, special, and vocational education settings [MR7.S1];
5. Identify and implement effective instructional practices (e.g., teaching skills which will enhance students' self-determination and participation and inclusion in their families, schools, and communities) [CC4.S10, MR4.K3, MR4.S6, MR5.K1, MR6.S1];
6. Conduct professional activities consistent with legislative and regulatory provisions related to federal, state, and local education, rehabilitation, disabilities, social services, social security and labor services [CC1.S2, CC3.K3, CC3.K7, CC3.K9];
7. Contact, interview, and observe professionals employed within various agencies and organizations providing interagency services to individuals with disabilities and their families in order to assess the scope and quality of interagency services [CC4.S9, MR7.S1]; and
8. Demonstrate a commitment to developing the highest educational and quality-of-life potential of individuals with disabilities [CC8.S1]



### **3.0 Course Requirements:**

- 3.1 Completion of two quizzes covering course readings, guest speakers and lectures, applied activities, and practicum experiences with professionals employed in agencies providing interagency transition services (50 points each; 100 total);
- 3.2 Completion of one interview/observation of one professional employed within one of the various agencies and organizations providing interagency services to individuals with disabilities and their families in order to assess the scope and quality of interagency services (40 points);
- 3.3 Completion of one peer review of the agency interview/observation (5 points);
- 3.4 Completion of a proposal and journal describing one 6-hour practicum experience with an agency or organization providing interagency services to individuals with disabilities and their families (85 points); and
- 3.5 Participation in applied in-class activities (20 points).

### **4.0 Course Grading:**

4.1 Final course grades will be based on the percentage of total points earned by each student. A total of 250 points may be earned across all course requirements:

<sup>1</sup> Quizzes (50 points each)	100
<sup>2</sup> Interview/Observation	40
Peer Review of Interview/Observation	5
Practicum Proposal/Journal	85
Class Participation	<u>20</u>
Total	250

4.2 Final course grades will be assigned according to the total number of points earned:

- A = 225 and above
- B = 200 – 224
- C = 175 – 199
- D = 174 and below

4.3 As stated in the UNCC faculty handbook, “the grade of ‘I’ is assigned at the discretion of the instructor when a student who is otherwise passing has not, due to circumstances beyond his/her control completed all the work in the course. The missing work must be completed during the next semester (fall or spring) in residence, but

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<sup>1</sup> Both quizzes must be taken during the scheduled course sessions. Being late for class, not coming to class in order to study for another course, making a doctor's appointment during the class period, your car breaking down, or a friend not picking you up for class are all examples of unexcused reasons for missing a quiz. You will not be able to make up a quiz missed for an unexcused reason. In the case of an excused and documented absence, (e.g., illness or death in the family), contact the instructor about scheduling a make-up quiz. The make-up quiz must be completed at a time and place agreed upon by the instructor and student.

<sup>2</sup> Ten percent of the total point value will be deducted from the total earned for each session that any assignment is turned in late. An assignment is considered late if it is given to the instructor after dismissal of the class session during which it was due.

not later than 12 months after the term in which the 'I' was assigned, whichever comes first. If the 'I' is not removed during the specified time, a grade of 'F', 'U', or 'N' as appropriate is automatically assigned. The grade of 'I' cannot be removed by enrolling again in the same course". (p. 12-13)

### **5.0 Assignments:**

5.1 Each student will complete two quizzes, each of which will include short answer and multiple choice questions addressing course readings, guest speakers and lectures, applied in-class activities, and practicum experiences with professionals employed in agencies providing interagency transition services.

5.2 Each student will contact, interview, and observe a professional employed within one of the various agencies and organizations providing interagency services to individuals with disabilities and their families in order to assess the scope and quality of interagency services. The assignment must be completed in an agency or organization other than your place of employment. The interview format will be developed as an in-class activity and a list of suggested and potential agencies and organizations will be provided.

5.3 Each student will review and provide written feedback on the interview/observation to one other student resulting in a permanent product that will be collected as part of each student's portfolio. Before the assignment is graded each student will have the opportunity to review and provide feedback to each other prior and revise the assignment as considered appropriate.

5.4 Each student will select one agency or organization from the list of human service agencies provided and will arrange and complete one 6-hour practicum at the agency or organization. A minimum of two visits is required. The assignment must be completed at an agency or organization other than the one selected for the interview/observation and other than your place of employment. Prior to arranging the practicum with the agency or organization, each student will complete and submit a practicum proposal sheet for approval by the instructor. During the practicum, each student will keep a journal that documents the dates and hours spent in the practicum and details the activities the student observed and participated in during the practicum. Specifically, the journal will describe examples of interagency collaborative practices and how these practices impacted services and supports to individuals with disabilities.

**6.0 Academic Integrity Statement:** Students are responsible for knowing and observing the requirements of **The UNCC Code of Student Academic Integrity (Catalog p. 24 & 25)**. This Code forbids fabrication or falsification of information, multiple submission of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements of permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluations in this course include a judgment that the student's work is free from academic dishonesty of any type; and the grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be

expelled from UNCC. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Students are expected to report cases of academic dishonesty to the course instructor.

**7.0 Course Attendance Policy:** Each instructor determines the attendance regulations for his or her own class. Students are expected to attend punctually all scheduled sessions in the courses for which they are registered and are responsible for completing the work from all of the class sessions. Absences from class may be excused by the instructor for personal illness, religious holidays, or participating as an authorized University representative in an out-of-town event. Whenever possible, students are expected to seek the permission of the instructor prior to absences. A student who does not attend the first scheduled meeting of a course may be disenrolled from the course by the department offering the course.

**8.0 Policy for Inclement Weather:** The University is rarely closed because of bad weather; when such a closing occurs, it will be announced over local radio and TV stations. There may be times when the University officially remains open, but bad weather in the region makes it otherwise or unsafe for faculty or students to travel. If I am unable to meet a class, I will advise the Departmental Office (704-547-2531). If you are uncertain if the class will meet, please call my office. If you cannot travel to class because of bad weather, please call my office (704) 547-2529. There will be no penalty for missing class due to valid bad weather conditions; however, it is the student's responsibility to obtain notes for missed sessions.

**9.0 Textbook:** Everson, J.M. (1983). Youth with disabilities. Strategies for interagency transition programs. Stoneham, MA: Butterworth-Heinemann.

## **10.0 Course Schedule:**

<b>Session</b>	<b>Topic</b>	<b>Readings</b>
Lecture 1	Course overview What is interagency collaboration?	Chapter 1
Lecture 2	Who are the Key Players?	Chapter 2
Lecture 3	The Forming and Storming Stages	Chapter 3
Lecture 4	Effective Communication	Supplemental reading
Lecture 5	Team Structure and Operating Procedures	
Lecture 6	Person-Centered Planning	Chapters 4-5
Lecture 7	Conducting Needs Assessments	
Lecture 8	The Norming Stage	
Lecture 9	The Performing Stage	Chapters 5-6
Lecture 10	Teaming: From Concept to Practice	Chapter 7

## **MENU OF POTENTIAL AGENCIES AND ORGANIZATIONS FOR AGENCY INTERVIEWS/OBSERVATION AND PRACTICUMS**

*(Providers of Interagency Transition and Supported Employment Services)*

1. **North Carolina Division of Vocational Rehabilitation Services**  
VR Counselors, Regional SE Consultants, VR State SE Consultant
2. **Area Mental Health/Developmental Disabilities/Substance Abuse Authorities**  
MH/DD Specialists, Single Portal Case Managers
3. **Local School Systems**  
Transition Coordinators, Vocational Evaluators
4. **Community Colleges**  
Compensatory Educational Programs, Offices of Disability Services for Students
5. **Supported Employment Programs (Stand-Alone Program or Sheltered Workshops)**  
Job Coach/Employment Specialist, SE Supervisor/Coordinator
6. **Exceptional Children's Assistance Center**  
Transition Specialists
7. **Other Public/Private Agencies/Organizations**  
Those who provide housing, recreation, health and medical services, legal and advocacy services to individuals with disabilities and their families

## POTENTIAL PRACTICA ACTIVITIES

- Attend an IEP/ITP/IHP/IPE meeting
- Meet/interview consumers/students/parents
- Participate/observe a vocational evaluation
- Attend a Single Portal meeting
- Attend a placement meeting
- Observe/participate in a situational assessment/job sampling

## PRACTICUM PROPOSAL

Student: \_\_\_\_\_

Campus: \_\_\_\_\_

Practicum Site: \_\_\_\_\_

Practicum Contact (name, address, & telephone number:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Brief Description of Practicum Project:

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Instructor Approval: \_\_\_\_\_ Date \_\_\_\_\_

Your practicum experience requires you to make a minimum of two visits to site you selected and spend a minimum of six hours (across the two visits) at the site. Please complete two journal entries (one for each visit) describing your experiences during each visit.

STUDENT'S NAME: \_\_\_\_\_

COURSE SITE: \_\_\_\_\_

NAME OF AGENCY: \_\_\_\_\_

AGENCY CONTACT PERSON: \_\_\_\_\_

Each journal entry must include: 1) date of visit/starting and ending times: 2) description of activities in which you participated; and 3) description of observations/impressions of interagency teaming and collaboration.

**AGENCY INTERVIEW/OBSERVATION  
PEER REVIEW**

STUDENT: \_\_\_\_\_

PEER REVIEWER: \_\_\_\_\_

COURSE SITE: \_\_\_\_\_

Criteria for Review:

Agency/Organization Authorization?

Federal/State Legislation?

Mandates?

Mission?

Interagency Linkages?

Definition of Disability?

Target Population Served?

Eligibility Requirements?

Eligibility Process?

Funding?

Waiting List?

Array of Services?

Accessing the System?

Intake Process?

Discharge Process?

Conflict Resolution?

Internal? External?



## **Lecture 1: What is Interagency Collaboration?**

### **I. The Goal of the Course**

#### **Slides 1-3**

The goal of this course is to explore interagency services, supports, and outcomes for individuals with disabilities and their families. Our exploration will emphasize school-to-adult life transition services and supported employment outcomes, but will also address person-centered planning as a consumer assessment and planning tool and consumer-directed homeownership and postsecondary education as consumer outcomes. This goal will be accomplished through course readings, applied in-class activities and discussions, practicum experiences, and quizzes.

By the end of this course, successful students will be able to:

- (a) initiate interagency teams to address transition and supported employment services
- (b) guide interagency teams through a developmental sequence of interagency teaming activities
- (c) monitor and evaluate teams' effectiveness in implementing interagency services.

### **II. Why Study Interagency Services?**

#### **Slide 4**

Many of you may be asking yourselves, "Why dedicate an entire course to the study of interagency services?" There are at least three reasons that a course dedicated to interagency services is appropriate and useful to special education and rehabilitation professionals.

First, over the past two decades, legislative mandates impacting transition and supported employment have moved from simply encouraging interagency collaboration to aggressively requiring it. For example, IDEA 1997 (P.L. 105-17) requires evidence of interagency linkages and responsibilities in the IEP/transition planning of all students with disabilities. Evidence of such interagency collaboration must be documented at the individual student- and family- level. However, in many communities, this mandate has been expanded to embrace community and state-level interagency collaboration. Similarly, the Workforce Investment Partnership Act of 1998 (P.L. 105-220) and the Ticket to Work and Work Incentives Improvement Act of 1999 (P.L. 106-170) mandate the creation of a nationwide system of one-stop career centers. One desired outcome of these Acts is the coordination of all agencies and organizations that currently provide or propose to provide career development and employment services to persons with disabilities and their families. The level of interagency collaboration that must take place to meet the mandates of these federal Acts will be far-reaching and embrace federal-, state-, community- and individual-levels of collaboration.

Second, effective practices research is beginning to show a positive relationship between interagency collaboration and consumer and family satisfaction and improved postsecondary outcomes among youths with disabilities. Not surprisingly, those communities and states that show evidence of collaborative transition and supported employment activities among education, rehabilitation, and developmental disabilities/mental retardation professionals and among professionals, families, and students with disabilities appear to evidence high levels of stakeholder satisfaction. It is also not surprising that these same communities and states appear to evidence more coordinated and community-inclusive postsecondary outcomes among former students with disabilities.

Third, collaborative interagency activities promote a focus on communities and individual consumers. This is especially true at a local or regional level, when teams of persons concerned about transition services and supported employment outcomes – or indeed any human service and outcomes – agree to work together to identify common needs and goals and share resources. Recent research shows a link between caring communities and family involvement, interagency linkages, and consumer outcomes.

### III. The “Cs” of Interagency Services

#### Slides 5&6

The goal of this activity is to work individually to identify as many words as you can, beginning with the letter “c” that describe interagency services. You have two minutes. Begin now.

(After two minutes) How many words did you identify? Did anybody identify more than 5? 10? 15?

Now, working with a partner, your goal is to increase your list of words. You have an additional two minutes.

(After two minutes) How did you tackle this goal? Were you able to increase your list of words?

This activity illustrates the power of collaboration, that is, the power of working with one or more other persons to make the best use of resources. Individually, you were each able to think of a small number of words. When you combined your resources with those of other members of the class, you were able to greatly expand your list. The primary reason professionals should embrace interagency collaboration is to make the best use of scarce resources in order to accomplish desired consumer outcomes.

### IV. Defining Terms

#### Slide 7

There are three terms that we will use throughout this course to lay a foundation for the interagency models and practices we will be discussing.

First, let's define "collaborative". Collaborative may be defined as a relationship between two or more agencies or organizations that is mutually beneficial and well defined. The purpose of such a relationship is to achieve common goals (Mattessich & Monsey, 1992).

Slide 8

Next, let's define "interagency". In the context of transition services and supported employment outcomes, interagency may be defined as "...a group of individuals representing multiple and diverse agencies and organizations who come together and commit themselves to teaching, learning, and working with each other across traditional agency and organizational boundaries to better serve individuals with disabilities" (Everson & Guillory, 1998, p. 300).

Slide 9

Lastly, let's define "team". Varney (1989) characterizes teams by four concepts: 1) team member roles are clear; 2) there are individual and team goals; 3) structures, practices, and systems are agreed upon; and 4) working relations are viewed as being essential. Everson & Guillory (1998, p. 301) note that a team is

Slides 10&11

"...a group of individuals representing multiple and diverse agencies and organizations who come together to address a common need and agree to pursue a common goal. Over time and with much effort, the group becomes a team if its members agree to common values and a mission, set clear goals and objectives, design an organizational structure and operating procedures, develop common communication patterns, and pursue agreed-upon roles and activities".

## V. Levels of Teaming

Slide 12

Collaborative interagency teaming focusing on transition and supported employment should and can take place at multiple levels, including state-, regional- or community- and individual consumer-levels. In this course, we will be exploring interagency issues at multiple levels, with an emphasis on regional- or community-level and individual consumer level.

## VI. Major Functions of Interagency Teams

Slide 13

Collaborative interagency teams will vary in their functions or activities depending upon the level at which they operate, the need that brought them together, and the goals they agree to pursue. However, Blalock & Benz (1999, p.5) suggest seven typical functions of teams addressing transition services:

- 1) team development
- 2) community needs assessment
- 3) action planning
- 4) consumer outcomes
- 5) professional development and technical assistance
- 6) resource coordination
- 7) monitoring and evaluation

## VII. Tuckman's Teaming Model

### Slide 14

There is an oft-quoted adage about interagency collaboration - "agencies don't cooperate, people do". Thus, we will spend a considerable amount of time in this course studying people and the ways they cooperate – or should cooperate – with other people.

### Slide 15

B.W. Tuckman has been studying teams and their development since the mid-1960s. He has proposed a model for understanding teams that can be easily applied to teams charged with addressing transition and supported employment. Tuckman's (1965) model suggest that teams progress through four developmental stages: 1) forming; 2) storming; 3) norming; and 4) performing. In this course, we will be using Tuckman's stages of teaming as a conceptual framework for exploring interagency collaboration and we will discuss potential interagency team functions as suggested by Blalock and Benz within the various stages.

## VIII. Discussion Points

### Slide 16

As an assignment for this course, you have been asked to interview/observe a professional employed by an agency or organization charged with providing interagency transition services and/or supported employment outcomes. The goal of this activity is to assess the quality and scope of the interagency services being provided by the agency or organization to consumers and their families.

Given what you have learned so far about interagency collaboration, in a small group (i.e., 3-5 students), brainstorm a list of potential questions you might want to ask, materials you might want to review, and/or activities you might want to observe. You have 20 minutes. Begin now.

(After 20 minutes) What was the goal of this activity? How did your group tackle this goal? Did various students assume identifiable roles? What questions did you identify to potentially ask?

Hold on to this list. During a later course session, as you learn more about interagency collaboration, we will further develop this questionnaire. Once you have developed it, you will use it as a framework to complete your agency interview/observation.

**INTERAGENCY  
COLLABORATION**

SPED 6351, Spring 2001

Jane M. Everson, Ph.D.

<http://education.uncc.edu/transition>

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**GOAL OF COURSE**

To explore interagency services,  
supports, and outcomes for individuals  
with disabilities and their families

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**COURSE OUTLINE**

- Two quizzes (50 points each)
- Interview/observation (40 points)
- Peer review of interview/observation (5 points)
- Practicum proposal/journal (85 points)
- Class participation (20 points)

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### WHY STUDY INTERAGENCY ISSUES?



- Legislative mandates
- Supported by effective practice research
- Promotes a community and consumer focus

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### THE “Cs” OF INTERAGENCY SERVICES: AN ACTIVITY

- Goal: To explore the defining characteristics of the word “interagency”
- Process: (1) You have two minutes to identify as many words as you can beginning with the letter “c” that describe interagency. (2) You have two additional minutes to work with a partner to increase your list of words.

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### THE “Cs” OF INTERAGENCY SERVICES

- |                 |                        |
|-----------------|------------------------|
| • Community     | • Consensus            |
| • Communication | • Comprehensive        |
| • Coordination  | • Creative             |
| • Commitment    | • Culturally-sensitive |
| • Caring        | • Competent            |
| • Consumers     | • Cost-effective       |
| • Constructive  | • Collaborative        |

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**DEFINING  
“COLLABORATIVE”**

A relationship between two or more agencies or organizations that is mutually beneficial and well-defined . The purpose of such a relationship is to achieve common goals.

(Mattessich & Monsey, 1992)

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**DEFINING “INTERAGENCY”**

“...a group of individuals representing multiple and diverse agencies and organizations who come together and commit themselves to teaching, learning, and working with each other across traditional agency and organizational boundaries to better serve individuals with disabilities”.

(Everson & Guillory, 1998, p. 300)

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**DEFINING “TEAM”**

Successful teams embrace four concepts: (1) team member roles are clear; (2) there are individual and team goals; (3) structures, practices, and systems are understood and agreed upon; and (4) working relations are viewed as essential.

(Varney, 1989 )

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### **COLLABORATIVE INTERAGENCY TEAM**

“...a group of individuals representing multiple and diverse agencies and organizations who come together to address a common need and agree to pursue a common goal. Over time and with much effort, the group becomes a team if its members agree

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### **COLLABORATIVE INTERAGENCY TEAM**

(Cont'd)

to common values and a mission, set clear goals and objectives, design an organizational structure and operating procedures, develop common communication patterns, and pursue agreed-upon roles and activities.

(Everson & Guillory, 1998, p. 301)

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### **LEVELS OF TEAMING**

- State-level
- Regional- or community-level
- Individual-level



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## MAJOR FUNCTIONS OF INTERAGENCY TEAMS

- Team development
- Community needs assessment
- Action planning
- Consumer outcomes
- Professional development and TA
- Resource coordination
- Monitoring and evaluation

(Blalock & Benz, 1999, p.5)

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## WORDS TO LIVE BY



Agencies don't cooperate; people do.

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## TUCKMAN'S TEAMING MODEL

- Forming
- Storming
- Norming
- Performing



(Tuckman, 1965)

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**ASSESSING INTERAGENCY  
PROGRAMS: CLASS  
DISCUSSION**

- Goal: To begin an exploration of potential questions to ask, materials to review, and/or activities to observe to assess scope and quality of interagency services.
- Process: Brainstorm as a group for 20 minutes.

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## Lecture 2: Who are the Key Players?

### I. Potential Transition/Supported Employment Agencies

#### Slides 1&2

In every state, the state department of education (SDE) is the primary agency responsible for transition services. SDEs are mandated to initiate and oversee the planning and delivery of educational, including school-to-adult life transition services, at both the state- and local community-levels. As the primary agency responsible for transition services, state and local departments of education agencies *prepare* students for adult life and *send* them on to adult service agencies and adult opportunities and experiences.

In every state, the vocational rehabilitation (VR) agency is also a key player in the delivery of transition services and supported employment outcomes at both the state- and local-levels. Historically, VR counselors have worked closely with educators at the LEA (local education agency) or community-level and with state leaders at the state-level during the development and implementation of IEPs/statements of transition services. VR agencies and VR counselors *receive* and *support* students once they exit high school.

Most recently, the Social Security Administration (SSA) has been mandated at all levels to work more closely with SDEs, LEAs, VR, as well as with consumers and their families to align the eligibility process and service delivery. SSA also *receives* and *supports* students as they exit school and enter the world of work.

There is strong interagency collaboration at the federal level and at the state level among education, vocational rehabilitation and social security.

There is less of a federal presence in interagency issues within the agencies charged with overseeing mental health and developmental disabilities services, but in nearly every state, state mandates and sometimes even legislation, has attempted to align these services to better meet the needs of consumers and their families. Thus, there tends to be a strong state-level commitment to interagency collaboration between among agencies and education, vocational rehabilitation, and social security. These agencies also *receive* and *support* students as they exit high school and enter the world of work and community living.

For example, in North Carolina, as well as in several other states, the concept of “single portal of entry and exit” has been proposed as one vehicle to align disability services at the state-, community- and individual consumer levels.

Other agencies, state departments of labor, the state’s systems of higher education, and the state housing authorities are often left out of discussion related to transition and supported employment services, but they too should be considered important players in any interagency efforts addressing transition

services and supported employment outcomes. Likewise, these agencies can receive and support students as they exit high school and enter the world of work, postsecondary education, and community living.

## II. Transition and Supported Employment Service Components

### Slide 3

When assessing the scope and quality of transition services and supported employment outcomes, Cozzens, Dowdy & Smith (1999) suggest considering six critical service components:

- 1) the agency's legislative or mandated authorization
- 2) the agency's definition of disability as used to determine target population
- 3) the agency's eligibility requirements for consumers to receive services
- 4) the agency's array of services potentially offered to eligible consumers
- 5) the process required for consumers to access the system
- 6) the process available, internally and externally, to resolve conflict between consumers and the agency.

## III. IDEA (P.L. 105-17) Definition of Transition Services

### Slides 4-7

For example, SDEs and LEAs are legislatively authorized to provide transition services through IDEA (P.L. 105-17). In this legislation, transition is defined as a coordinated set of activities that are designed within an outcome-oriented process. Transition must be based upon the individual student's needs and must take into consideration the student's preferences and interests. Transition services that must be addressed for all students age 14 and older who receive special education services include:

- a) instruction
- b) related services
- c) community services
- d) employment and other post-school options
- e) daily living skills (when appropriate)
- f) functional vocational evaluation (when appropriate).

There is a rich history in the effective practices literature suggesting the benefits of collaborative interagency teaming to plan and provide these services. In addition, the most recent amendments to IDEA (P.L. 105-17) have mandated the systematic involvement and documentation of needed interagency linkages and responsibilities.

## IV. Workforce Investment Partnership Act of 1988 (P.L. 105-220) and Ticket to Work and Work Incentives Improvement Act of 1999 (P.L. 106-170)

### Slides 8&9

Similarly, these two pieces of recent legislation overhaul the myriad of career development, adult education, and job placement services available to consumers with disabilities. For example, The Rehabilitation Act, the authorizing legislation

for every state's VR system is now part of the Workforce Investment Partnership Act. This Act authorizes the development of a network of community-level "one stop career centers" in all states. The Ticket to Work and Workforce Incentives Improvement Act streamlines eligibility requirements by making SSI (Supplemental Security Income) and SSDI (Social Security Disability Insurance) recipients automatically eligible for VR services and by providing them with a "ticket to work". The Act also extends popular work incentives, such as continuation of Medicaid/Medicare health benefits to more recipients and for a longer period of time once they obtain employment.

Both of these pieces of legislation have stimulated required and desired collaborative interagency activities at all levels in all states.

V. Discussion Points

Slide 10

As an assignment for this course, you have been asked to interview/observe a professional employed by an agency or organization charged with providing interagency transition services and/or supported employment outcomes.

The goal of this activity is to continue assessing the quality and scope of the interagency services being provided by the agency or organization to consumers and their families. In the same small group you worked with last class session, first review the list you brainstormed last class session of potential questions you might want to ask, materials you might want to review, and/or activities you might want to observe. Next, expand and refine this list using the six components suggested by Cozzens et al. (1999). You have 20 minutes. Begin now.

(After 20 minutes) What was the goal of this activity? How did your group tackle this goal? Did various students assume identifiable roles? Compare and contrast your group's functioning this class session with its functioning last session. During your agency interview/observation, what questions did you decide to ask? What materials would you like to review? What activities would you like to observe?

### POTENTIAL TRANSITION AGENCIES

- State departments of education
- Vocational rehabilitation
- Social security administration
- Mental health

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### POTENTIAL TRANSITION AGENCIES (Cont'd)

- Developmental disabilities
- State departments of labor
- Postsecondary education
- State housing authority

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### TRANSITION SERVICE COMPONENTS

- Authorization?
- Definition of disability?
- Eligibility requirements?
- Array of services?
- Accessing the system?
- Conflict resolution?

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**IDEA (P.L. 105-17)  
DEFINITION OF  
TRANSITION**

... *coordinated* set of activities... designed within an *outcome-oriented process*, which promotes movement from school to post-school activities, including post-secondary education, vocational training, integrated employment, continuing education, adult services, independent living, or community participation.

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**DEFINITION OF  
TRANSITION (Cont'd)**

... must be based upon the *individual student's needs*, taking into account the *student's preferences and interests*.

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**DEFINITION OF  
TRANSITION (Cont'd)**

- Instruction
- Related services
- Community services
- Employment and other post-school options
- (When appropriate) daily living skills
- (When appropriate) functional vocational evaluations

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**DEFINITION OF  
TRANSITION (Cont'd)**

Beginning at age 14, the IEP must include a statement of transition service needs ...that focuses on the child's course of study

Beginning at age 16, the IEP must include a statement of needed transition services including when appropriate, a statement of the interagency responsibilities or any needed linkages

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**WORKFORCE INVESTMENT  
PARTNERSHIP ACT OF 1998  
(P.L. 105-220)**

- Coordinates system of federal aid programs in voc ed, adult ed, and job training
- Through the Rehabilitation Act of 1998, provides for federal/state VR services
- SSI/SSDI beneficiaries automatically eligible
- Renames the IWRP an IPE

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**TICKET TO WORK AND WORK  
INCENTIVES IMPROVEMENT  
ACT OF 1999 (P.L. 106-170)**

- Provides SSI and SSDI beneficiaries with a ticket to VR and to work
- Includes choice of employment services and providers
- Extends Medicaid and Medicare coverage to employees with disabilities

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**ASSESSING INTERAGENCY  
PROGRAMS: CLASS  
DISCUSSION**

- Goal: To explore in more detail potential questions to ask, materials to review, and/or activities to observe to assess scope and quality of interagency services.
- Process: Brainstorm as a group for 20 minutes.

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### **Lecture 3: The Forming and Storming Stages**

#### I. Tuckman's Four Stage Model

##### Slide 1

B.W. Tuckman (1965) has described a four stage developmental model that he believes all teams must progress through in order to become effective and functioning teams. The four stages are: 1) forming; 2) storming; 3) norming; and 4) performing. Tuckman suggests that all teams will developmentally progress through all four of these stages with or without guidance. Thus, as a potential team member or team leader, developing an understanding of where you and where a team are functioning within this model will help you better understand the roles you might play and the experiences and activities the team is undertaking.

In this course session, we will begin exploring the forming and storming stages as typically experienced by interagency teams. It is estimated by many teaming researchers (e.g., Everson & Rachal, 1996; Robbins & Finley, 1999) that teams spend approximately 75% of their time together in the forming and storming stages. Thus, we will dedicate several course sessions to interagency activities associated with these stages.

#### II. Major Functions of Interagency Teams

##### Slide 2

Blalock & Benz (1999) suggested seven major functions or activities of effective interagency teams charged with addressing transition services:

- 1) nurturing team development
- 2) conducting community needs assessments
- 3) pursuing team action planning
- 4) pursuing desired consumer outcomes
- 5) nurturing professional development and technical assistance
- 6) exploring resource coordination
- 7) conducting monitoring and evaluation activities.

The systematic pursuit of these activities will take an interagency team through all four stages of Tuckman's model. Robbins and Finley (1999) support Tuckman's findings, noting that no team goes directly from forming to performing and that struggle and adaptation are necessary steps in every team's development.

The first two team functions, nurturing team development and conducting community needs assessments are forming activities. Nurturing team development is a critical activity during the forming stage of any team. Unfortunately, groups that are eager to begin addressing what they perceive to be the real work, that is, the needs and goals that brought them together too often overlook the importance of team nurturing.

Community needs assessments also begin during the forming stage and are frequently a catalyst for moving a team into the storming stage. Needs assessments help a team to reach consensus on the need(s) that brought them together and help them begin thinking about the goals and actions they will pursue. Needs assessments, as we will discuss later in this course, may be formal such as surveys, focus groups, analysis of existing agency data or more informal such as team discussions.

The remaining five interagency team functions (i.e., action planning, consumer outcomes, professional development and technical assistance, resource coordination, and monitoring and evaluation) are characteristic activities of the norming and performing stages. They are the real work of the team. We will talk about them during lectures later on in the semester.

### III. The Forming Stage

#### Slide 3

The forming stage is best described as a “getting to know each other stage”. All the key stakeholders may be seated at the table, all the leadership, fiscal and other resources may be in place, but the group’s members are just learning to deal with one another and very little work will be accomplished. However, what work is accomplished is critical in laying a foundation for the team’s success – or failure – during latter stages.

Has anyone ever coached a group of children during their first season playing a sport? Or directed a group of aspiring actors through a theatre production? If you have, you know that in both of these examples, groups began in the forming stage – members looked to the each other and to the coach or director to understand what they were supposed to do. Members ask themselves and each other, “Why are we here?” and “Who is in charge?” Everyone wanted to be liked and to fit in because of the skills and experiences they brought to the activity. As members spent more time together and became more confident in understanding their roles, they began to make suggestions – even question the leadership of their coach or director. They began to storm. Over time, members assumed various roles, needs were assessed, goals were set, communication patterns established, actions pursued, and the results were evaluated. Only then did the team begin to gel and become able to win games and perform concerts. Only then did the team begin to norm and perform.

As a coach or director, you can no doubt look back on your experience and identify activities you did - or should have done - to assist the team in forming. Interagency teams are just like this; they often reach the storming stage and then look back and say, “we should have developed this system or we should have practiced this move”.

#### IV. Major Forming Activities of Collaborative Interagency Teams

##### Slides 4&5

Everson and Guillory (1998) suggest that there are six major activities that must be pursued during the forming stage by any team charged with addressing interagency transition services. The first activity is defining the preliminary community need, that is, the reason(s) that brought the team together and will encourage them to work on a common need(s). To define the preliminary need, the team must think about the people and agencies to be impacted by the need and the geographical area to be served. Answering these questions will assist the team in assessing its membership – who should be on board to address this need in this community? Developing a written membership list is a critical activity of the forming stage.

During the forming stage, the emerging team must also hold at least two meetings – an organizational meeting and at least one follow-up meeting. Agendas for these meetings must be carefully planned to allow full participation of invited core members and to allow full discussion of the identified preliminary need, target population, and geographic area to be served.

#### V. Initiating a Team: An Activity

##### Slides 6&7

The goal of this small group activity is to brainstorm, as a group a list of potential community needs that might be addressed by a potential interagency team in your community. You have 10 minutes. Begin now.

(After 10 minutes) What was the goal of this activity? How did your group tackle the goal? What needs did you identify? Compare and contrast your group's functioning this class session with its functioning last session.

Next, pick one need from the list your group brainstormed. The goal of this activity is to brainstorm potential agencies and people in your community that might address this one identified need and to develop a draft agenda for the meeting. You have 15 minutes. Begin now.

(After 15 minutes) What need did you choose? What agencies and people did you identify as potential stakeholders? How would the identified agencies and people vary depending upon the need you chose to pursue? Did you consider whether an agency's goals would be met by serving on this team? What strategies did you choose to ensure attention to desired forming activities during the team's initial meeting?

#### VI. Confirming Membership

##### Slide 8

A critical activity of the forming stage is the development and dissemination of a membership list. This list legitimizes the team; it says, "we exist". The list insures the agency's commitment for a member or members to serve on the team.

## VII. Words to Live By

Slide 9

Plan on an average of four meetings and six months to accomplish forming activities.

## VIII. The Storming Stage

Slide 10

The storming stage may be described as “the honeymoon is over!” stage. Team members now know each other and feel comfortable sharing their ideas and opinions. They begin complaining about each other, the team leader, the meetings, the identified need(s), the refreshments, and so forth. Little real work may be accomplished and team members may become frustrated, angry, or lose interest.

This stage is not for the squeamish. The best that can be said about the storming stage is that it must happen, it is predictable. If team members recognize that this is a developmental stage, a growing pain, then they can expect it and address issues as they arise. Humor helps. As will an external facilitator or coach. Issues that are not resolved during this stage will come back to haunt the team later on. It is during this stage that teams are most likely to fall apart and it is at this stage that teams are most likely to request help from an external facilitator or coach.

## IX. Team Storming Activities

Slide 11

During the storming stage, teams must be address these questions and reach consensus on the responses:

- 1) What are we supposed to accomplish?
- 2) What are our roles and responsibilities?
- 3) How will we communicate and make decisions?
- 4) Who is in charge? When and how will we meet?

Slide 12

Words to live by in this stage are – Plan on an average of six meetings and six months in the storming stage.

### TUCKMAN'S TEAMING MODEL

- Forming
- Storming
- Norming
- Performing



(Tuckman, 1965)

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### MAJOR FUNCTIONS OF INTERAGENCY TEAMS

- Team development
- Community needs assessment
- Action planning
- Consumer outcomes
- Professional development and TA
- Resource coordination
- Monitoring and evaluation

(Blalock & Benz, 1999)

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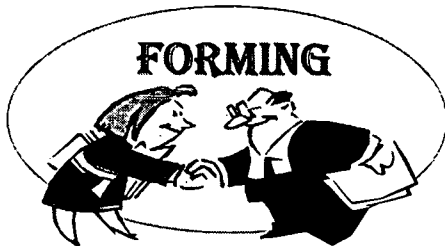
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### Stages of Team Development

#### FORMING



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**TEAM FORMING ACTIVITIES**

- Define the preliminary community need
- Define the people/agencies impacted by the need
- Define the geographical area to be served
- Define the core team members
- Hold an organizational/follow-up meeting
- Confirm membership/develop list

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**GUIDELINE #1:  
INITIATE A TEAM**

- What is the preliminary need?
- Who are the people impacted by the need?
- How will a team address this need?
- Who should initiate the team?
- Who are the appropriate people to invite to become members?
- What is the agenda for the organizational meeting?  
the follow-up meeting?

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**INITIATING A TEAM:  
AN ACTIVITY**

- Goal: To brainstorm a list of potential community needs that might be addressed by an interagency team
- Process: Brainstorm as a group for 10 minutes.

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### INITIATING A TEAM: AN ACTIVITY

- **Goal:** To brainstorm potential agencies and people that might address an identified community need; and to develop a draft organizational meeting agenda.
- **Process:** Brainstorm as a group for 15 minutes.

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### GUIDELINE #2: CONFIRM MEMBERSHIP

- Agency commitment to serve on team?
- Agency/personal goals articulated?
- Membership list developed and disseminated?



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### WORDS TO LIVE BY

Plan on an average of four meetings and six months to accomplish forming activities



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Stages of Team Development

**STORMING**



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**TEAM STORMING ACTIVITIES**

- What are we supposed to accomplish?
- What are our roles and responsibilities?
- How will we communicate and make decisions?
- Who's in charge? When and how will we meet?

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**WORDS TO LIVE BY**

It is estimated that teams will spend  $\frac{1}{4}$  of their time together functioning in the forming and storming stages. Plan on an average of six meetings and 6 months in the storming stage.



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## Lecture 4: Effective Communication

### I. What is Effective Communication?

#### Slide 1

Developing the behaviors and skills needed to accomplish effective communication among all interagency team members is a critical, but all too frequently overlooked activity that must be addressed during a team's storming stage. Without attention to effective communication, teams will storm and ideas will be misunderstood, feelings will be hurt, and actions and results will be unclear. Effective communication is much more than just talking, but what exactly is it? Working individually, take three minutes to write a definition of effective communication. Begin now.

(After three minutes) How did you define effective communication? Communication occurs when two or more people send and receive information between them. Communication may verbal, non-verbal, or most likely a combination of both. It may be active, passive, or again, most likely, a combination of both. Communication is effective when the sender successfully communicates to the receiver(s) what he or she intended to communicate and when the receiver(s) successfully interprets and acts upon the intended communication.

We learned to communicate as babies – we quickly learned to reach for something if we wanted it, to cry when we didn't get what we wanted, and to scream if someone did not respond the way we wanted or in the timeframe we expected. Was this effective communication? Sometimes it was, but often it was not!

But as adults, effective communication is more complex. Effective communication is just like any other skill or behavior we seek to learn. It takes awareness, and practice before it is mastered. Think about a skill or behavior you sought to learn as an adult – perhaps skiing, ASL, golf, or yoga. When you were first introduced to the skill, you needed to pay a great deal of attention to each step needed for correct positioning or footwork. You were acutely aware of every thing you needed to do, could do, and couldn't do. Over time, if you practiced and practiced and practiced, your positioning and footwork became smoother, you became more relaxed and less conscious of every movement. You may still experience difficulty with certain steps, but others you can perform fluently. Over time and with much practice, you might have mastered the skill – you were able to perform it unconsciously.

Let's practice an example. Using your dominant hand, print your full name. Was this difficult? No. You mastered this skill many, many years ago. You perform it unconsciously.

Now, with your non-dominant hand, print your full name, slowly and carefully, doing your best work. How did you do? Were you aware of each movement you needed to make?

Now, still using your non-dominant hand, practice printing your name 4-5 times. Did you improve with practice? Do you think you could master this skill over time and with much practice?

In this lecture, I am going to ask you to return to the awareness stage of communication so that we can learn some new, more effective behaviors to use when we want and need to communicate with our significant others, families, and team members. Following today's lecture, you will, if you choose, be able to practice and practice and practice these behaviors until you master more effective communication.

The model we will be discussing is one of many communication models. This specific one was developed by Mary Ann O'Neil and her colleagues with O'Neil & Associates (1997). It consists of 13 different, but related behaviors. The behaviors are categorized within four areas: 1) initiating; 2) active listening; 3) responding; and 4) process. Awareness of all these behaviors and mastery of most of them is critical for one to communicate effectively.

## II. Initiating Behaviors

### Slide 2

Initiating behaviors are necessary to get a conversation going. They suggest a new idea or action or expand upon a previous idea or action. They encourage receiver(s) to act, to respond. There are two different, but related initiating behaviors: 1) proposing; and 2) expanding. "Let's initiate an interagency team to discuss the viability of establishing a new supported employment program" is an example of a proposing behavior. "Yes, and let's invite the local chamber of commerce to join us" is an example of an expanding behavior.

### Slide 3

O'Neil & Associates suggest that about 15% of any effective team meeting be spent engaging in initiating behaviors. Too many can overwhelm people, cause meetings to last past their planned timeframe, and disallow any one idea to be fully developed or decided upon. Too few can result in people feeling bored, disinterested, and result in one idea, perhaps not fully favored by all to be viewed as the solution.

## III. Active Listening Behaviors

### Slides 4-6

Active listening behaviors help receivers fully understand and respond to previous communications.

There are five different, but again related, active listening behaviors:

- 1) informing
- 2) inquiring

- 3) reflecting
- 4) testing for understanding
- 5) summarizing.

O'Neil & Associates suggest that nearly three-quarters, about 70% of any effective team meeting, be spent engaging in active listening behaviors. Too many can leave people feeling distracted and bored and feeling like no progress is being made. Too few can result in misunderstandings, quick decisions, and confusion. "My agency has an available conference room for us to meet in" is an example of an informing behavior. "Is there a charge for the room"? is an example of an inquiring behavior. "I feel like you have a problem with the suggestion of meeting at the VR agency" is an example of a reflecting behavior. Testing for understanding is a behavior that forces a receiver to assess whether or not he understood a sender's message. For example, "Are you suggesting that we meet in the VR agency's conference room because it is free even though some families and consumers might have reservations about it since it is an agency?". Testing for understanding always poses a question and requires the sender to confirm, "yes, that is what I said" or "no, I meant to say..." Summary is a statement of what has been said or decided. It should follow testing for understanding.

#### IV. Responding Behaviors

Slides 7&8

Responding behaviors indicate agreement and disagreement with previous communications.

There are two effective behaviors: 1) agreeing and 2) disagreeing. And there are two that should never be a part of any communication, but unfortunately they are two that most of us have mastered very well – especially with the ones we love the most – 1) attacking and 2) defending. Attacking and defending should have no part in any effective communication, but we must be aware of them before we can change them.

Agreeing and disagreeing are about ideas or proposals – not about people.  
Attacking and defending are about people – not ideas or proposals.

O'Neil & Associates suggest that about 15% of any effective team meeting be spent engaging in responding behaviors. Too many can result in heated and overly emotional discussions, arguments and misunderstandings. Too few can result in people feeling uncomfortable talking, unclear about what has been agreed upon, and unsure of next steps.

## V. Process Behaviors

Slides 9&10

Process skills are used as needed to either bring people into communications occurring during meetings or to shut them out of communications occurring during meetings.

Bringing in behaviors are used to encourage reticent members to express their ideas or opinions; shutting out behaviors are used to let more conversant members know that their proposals or opinions have been heard and understood.

O'Neil & Associates suggest that less than 1% of an effective meeting be spent engaging in process behaviors.

## VI. Effective Feedback

Slide 11

Feedback is descriptive information from one person about observed behaviors of another. Feedback should be given frequently and should be given to encourage continuation of desired behaviors as well as to discourage undesired behaviors.

O'Neil & Associates suggest a number of guidelines to follow when giving feedback:

- 1) Ask permission to give feedback. "May I give you some feedback"?
- 2) Be descriptive versus evaluative. "Yesterday, when you told me that you had not completed the paperwork I assigned you..."
- 3) Be specific versus general. "... I was unable to give the superintendent the accurate number of students who planned to exit school this year."
- 4) Emphasize the effects of the behavior. "As a result, we risk losing funding for these students".
- 5) Be timely versus out of useful context.
- 6) Check for clear communication. "Are we in agreement that you will give me the data I need by noon today?"
- 7) Use feedback versus dumping.

## VII. Conflict Resolution Model

Slides 12&13

Conflict occurs when there is a gap between what someone wants and expects and what he or she actually receives. Conflict is a natural part of communication and should first be addressed using the 11 behaviors we have discussed thus far in class. Especially, use the active listening behaviors such as inquiring, reflecting, and testing for understanding.

If these fail, then next, ask permission to address conflict. "I've got a problem. Could we discuss this issue"? Respect "no" as an answer, but emphasize the need to address issue and schedule discussion at a later time. Focus on the

sender. "I need you to..." or "It would really help me if you..." Be specific about requirements and test for understanding. "Is it clear to you that I need you to get me a written table illustrating the data by noon today? Can you do that for me?"

What is Effective Communication?  
Effective Communication is....

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Initiating Behaviors

- Proposing
  - introduces a new idea
  - "I think we should get the grant writing team together before the holidays"
- Expanding
  - builds on the proposal
  - "We could make it a dinner meeting the first Friday of next month"

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effects of Initiating Behaviors

- Benefits
  - ideas are offered
  - ideas are developed for future
- Too Many Initiating Behaviors
  - no one idea gets developed fully
  - confusion
  - meeting runs longer than planned
- Not Enough Initiating Behaviors
  - overly detailed analysis
  - nothing seems to happen
  - ideas are presented, but not developed

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Active Listening Behavior

- Informing  
- gives information      "There are so many holiday parties and functions going on these next few weeks"
- Inquiring  
- asks a question      "What are the dates of the other parties?"
- Reflecting  
- gives information      "It sounds as through you are not in favor of a dinner meeting"

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Active Listening Behaviors

- **Testing Understanding**  
-attempts to clarify if one's perception is correct      "So are you thinking that it would be wiser to have a meeting during the work day?"
- **Summarizing**  
-recounts what has been said      "We are thinking about getting together before the holidays but are not sure whether that will be during the day or over dinner"

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effects of Active Listening Behaviors

- **Benefits**
  - increase in clarity and understanding
  - results in deeper analysis of ideas
  - sharing of ideas is encouraged
- **Too Many Active Listening Behaviors**
  - participants become bored and distracted
  - conversation gets bogged down with little progress
- **Not Enough Active Listening Behaviors**
  - quick decisions, not fully understood by participants
  - disorganized discussion
  - confusion is high
  - may have too many proposals
  - attacking and defending may be high

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**Responding Behaviors**

- **Agreeing** "Dinner sounds great to me."  
- supports another person's ideas
- **Disagreeing** "I personally don't have an evening to five up this month."  
- does not support another person's ideas
- **Attacking** "You never seem available when we are trying to have some sort of event for the team."  
- destructive behavior that aims directly at another person
- **Defending** "Maybe that's because no one ever asks my opinion before it appears on the calendar. I have a life, you know, and that means that I do not like combining work and my free time."  
- attempts to ward off a perceived attack

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**effects of Responding Behaviors**

- **Benefits**
  - lets people know what group members are thinking
  - people feel good
  - benefits and drawbacks of ideas are discussed openly
- **Too Many Responding Behaviors**
  - emotional, heated discussions
  - unresolved conflicts
  - misunderstandings
- **Not Enough Responding Behaviors**
  - discussion feels closed
  - ideas seem to go nowhere, undeveloped
  - unsure of who is supportive and who isn't

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**Process Behaviors**

- **Bringing In** "Kathleen, what do you think about having dinner together with the team before the holidays?"  
- encourages participation
- **Shutting Out** "It sounds as though you are not in favor of a dinner meeting."  
- prevents participation

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effects of process

**Behaviors**

- Benefits
  - Everyone participates
  - viewpoints of individuals understood
- Too Many Process Behaviors
  - discussion gets bogged down
  - repetition of comments and views
  - those shut out feel discounted, angry
- Not Enough Process Behaviors
  - lack of participation
  - discussion controlled by one or two members

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**Guidelines for Effective Feedback**

- Ask If You Can Give Feedback
- Be Descriptive vs. Evaluative
- Be Specific vs. General
- Emphasize the Effects of the Behavior
- Direct the Feedback to Controllable Areas
- Be Timely vs. Out of Useful Context
- Check for Clear Communications
- Use Feedback vs Dumping

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**Suggestions for Using the Conflict Resolution Model**

1. Ask permission to give feedback:  
 "I've got a problem. May I give you some feedback?"  
 "Could we discuss this issue?"
2. Respect no as an answer, but emphasize the need to address issue and schedule discussion for a later time or at another place:  
 "I understand that you are in a hurry now, could we discuss this after lunch?"  
 "Would you prefer to discuss this at your office?"
3. Focus on the sender:  
 "I need you to ..." or "It would really help me if ..."
4. Be specific about requirements:  
 "I need you to ..."Or"I need you to ...by (date)"

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## Confrontation and Conflict Management Model

### Sender

- Focus on Sender
- Help RECEIVER focus on SENDER
- Be specific about your requirements
- Negotiate on needs, not position/wants
- Put all other agendas on hold

### Receiver

- Focus on SENDER
- Help SENDER focus on SENDER
- Restate and clarify SENDER's requirements
- Negotiate on needs, not position/wants
- Put all other agendas on hold

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## **Lecture 5: Team Structure and Operating Procedures**

### **I. Storming Activities: Team Structure**

#### **Slide 1**

During the storming stage, it is important for teams to spend time discussing and determining how the team will be organized and how it will operate. Effective interagency teams spend time discussing and agreeing to follow specific guidelines during the storming stage with the recognition that they will be able to practice these guidelines, and reap the benefits of practice during the norming and performing stages.

Decisions about team structure must be negotiated and finalized early in a team's development. These negotiations characterize the storming stage and require the effective communication skills we discussed last course session. Among the first structural decisions a team must make is: How will the team relate to other teams in the state, region, or locality? Next, the team must decide the structure of the team: Will there be one large team consisting of all members or a "core team" of key members and agencies or organizations supported by a larger advisory group?

When teams are large, subcommittees or work teams might be convened to pursue specific team goals and work scopes. Berelson & Steiner (1964) suggest that the most desirable team size is five members. Everson & Rachal (1996) found that larger teams, those of 15 or fewer members can be effective when they use subcommittee or work teams, but they also noted that teams of this size may require a greater expenditure of resources (e.g., time), during the forming and storming stages.

### **II. Storming Activities: Team Operating Procedures**

#### **Slide 2**

Operating procedures describe how the team will operate. Operating procedures describe, for example, the frequency of team meetings, team roles and position descriptions, voting and decision-making procedures, and team meeting and action planning procedures. Decisions about team operating procedures must also be negotiated and finalized early in the team's development as part of the storming stage.

Operating decisions that a team must make include: How will the chair(s) be appointed? There are numerous ways to appoint chairs – by legal appointment and assigned to a specific agency or organization, by seniority appointment, and by election. Tropman et al. (1979) believe that appointing team chairs through team elections create the closest relationships between team chair and other team members.

Teams may choose to have one chair or two co-chairs, or a chair and a vice-chair. Tropman et al. (1979) suggest that chair roles include: (1) leader (2) administrator (3) meeting presider and (4) spokesperson. Everson & Rachal (1996) found that interagency teams that opted to have co-chairs were more

effective than teams opting to have only one chair or rotating chairs. As a result, they suggested that teams appoint co-chairs serving 2-year terms with differentiated timeframes to allow a senior chair to mentor and nurture the leadership skills of a junior chair. They also found that teams that included a professional and parent or consumer co-chair combination were most effective.

Next, teams must decide: What other roles will be appointed? Typically, these roles include a recorder, note taker or secretary and in some cases, a treasurer.

Regardless of the positions appointed, clear written job descriptions must be developed and included in the team's written operating procedures.

Teams must also decide: How frequently will meetings be held? Where and when will meetings be held? How will agendas be developed? How will meetings be facilitated?

Teams that develop "ground rules" are able to use these personal "dos" and "don'ts" to monitor their operating procedures. Ground rules may address, among other concerns, attendance policies, meeting effectiveness strategies, communication and conflict management skills, and voting or decision-making rules.

### III. Storming Activities: Meeting Effectiveness

Slides 3&4

Think about a recent team meeting you attended. Working individually, list all the things you liked about the meeting. Next, list all the things you disliked about the meeting. You have three minutes. Begin now.

(After three minutes) What things did you like about a recent meeting? What things did you dislike? The "golden rule" of effective meetings is: **goals, roles, and process**. Before you schedule a meeting and before you open a meeting, be certain that you can state the goals, roles, and process of the meeting. If you are a team chair, state the goals, roles, and process of the meeting as your opening comments. The goals of the meeting are what you hope to accomplish. Why are you meeting? What do you hope to achieve by the close of the meeting? Stating the roles is a reminder to assign someone to be a timekeeper and note taker if appropriate. Stating the roles also enables the team chairs to alert team members to agenda items requiring listening, information gathering, discussion, and voting. The process is a summary of the agenda. Stating the process reminds team members of starting times, ending times, break times, as well as time allotted to specific agenda items.

### IV. A Model for Effective Meetings

Slides 5-9

Effective meetings require team chairs to attend to specific activities before, during, and after a meeting. Before meetings, teams chairs must define the

goal of the meeting, select and invite participants, schedule a meeting location and time and notify participants of the information, arrange for refreshments, develop and distribute an agenda, and touch base with participants and non-participants to gather any needed information.

During meetings, team chairs must begin and end on time, define the meeting's goals, roles, and process, follow the agenda, use effective communication skills, manage conflicts, and summarize key points and decisions.

After meetings, team chairs must evaluate the effectiveness of the meeting, prepare and distribute minutes, review the minutes, and along with all other team members, take agreed-upon actions before the next scheduled meeting.

#### V. Storming Activities: Action Planning

Slides 10&11

Action planning is an important activity to develop during the storming stage. Action planning is a structured, yet flexible process that encourages teams to identify, organize, and monitor individual and team actions to accomplish desired goals, activities, and outcomes.

Action planning is useful because it focus the work of the team by setting long-and short-term priorities. It identifies needed actions, timelines, responsible team members, and monitoring and evaluation procedures. It schedules follow-up meetings. Last, it provides a written record of team actions and accomplishments.

Goals are the foundation of effective action planning. Goals are derived from a team's needs assessment activities and incorporate personal as well as group needs. They prioritize long- and short-term priorities. Goals are written statements of a team's desired future state of affairs. They are behavioral, measurable, attainable, and have time frames. Goals may be related to team development, systems change, and/or consumer outcomes. There is clear evidence (Weldon & Weingart, 1993) that clear, well-defined goals increase a team's effectiveness.

For each goal, action plans include activities, responsible team members, timelines, and monitoring and evaluation procedures. Action plans should be used to drive a meeting's agenda. For example, teams may find it useful to align the meeting agenda with the action plan. That is, use an update of the action plan to open the meeting, use notes on flipchart paper to record actions suggested during the meeting, and close the meeting by assigning team member responsibilities to generated actions.

Action planning helps interagency teams to maintain focus on its goals, to keep its eyes on the prize!

### STORMING ACTIVITIES: TEAM STRUCTURE

- How will the team relate to other teams?
- Will there be a "core team" of key members supported by an advisory group?
- Will there be subcommittees or work teams?

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### STORMING ACTIVITIES: TEAM OPERATING PROCEDURES

- How will chair(s) be appointed?
- What other roles will be appointed?
- What are the job duties of these positions?
- Where and when will meetings be held?
- How will agendas be developed?
- How will be meetings be facilitated?

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Think about one of your recent team meetings. Individually, list the things that you really liked about the meeting. Next list the things that really bothered you about the meetings.

*Things that really bother me about our team meetings...*



*Things I really like about our team meetings...*

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## The "Golden Rule of Effective Meetings

- Goals
- Roles
- Process



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## A Model For Effective Meetings

### *Before the Meeting:*

- Define the Goal
- Select and Notify Participants
- Schedule Room, Equipment, and Refreshments
- Develop an Agenda
- Invite Participants
- Distribute Agenda
- Develop Participant List and Touch Base with Non-Participants



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## A Model For Effective Meetings

### *During the Meeting:*

- Begin on Time
- Define Goals, Roles, and Process
- Follow the Agenda
- Use Interactive Behavior Skills
- Manage Conflicts
- Summarize
- End on Time



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## A Model For Effective Meetings



### After the Meeting:

- Evaluate Effectiveness of Meeting
- Prepare and Distribute Minutes
- Review Minutes
- Take Agreed-Upon Action

(Materials adapted from: Jay, 1977; O'Neil Group, 1990)

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## Checklist of Meeting Effectiveness Strategies

### Did our Team:

- Develop an agenda and distribute it to all team members?
- Ask for agenda additions at the beginning of the meeting?
- Set time limits for agenda items and identify a timekeeper?
- Identify agenda items as "for information", "for discussion", or "for decision"?
- Identify a recorder and keep an accurate record of the meeting?
- Make certain that copies of the minutes from the meeting will be distributed to all team members?
- Follow the agenda?
- Follow our "ground rules"?

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## Checklist of Meeting Effectiveness Strategies p. 2

### Did our Team:

- Make certain that our "action plan" was completed/updated?
- Make certain that copies of our "action plan" will be distributed to all team members?
- Use problem-solving mechanisms as needed?
- Use communication skills appropriately?
- Schedule a meeting date, time, and location for our next meeting?

(Materials adapted from: Jay, 1977; O'Neil Group, 1990)

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**STORMING ACTIVITIES:  
ACTION PLANNING**

- Goal are written statements of a desired future state of affairs.
- Goals are behavioral, measurable, attainable, and have time frames.
- Goals are based on assessed needs and incorporate personal as well as group needs.
- Goals may be related to team development, systems change, and/or consumer outcomes.

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**ACTION PLAN**

- Goal
- Activities
- Person(s) Responsible
- Timelines
- Evaluation Procedure

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## **Lecture 6: Person-Centered Planning**

### I. Overview of Person-Centered Planning

#### Slides 1-3

How many of you know the story of the little boy and the starfish? One day, a little boy was walking alone along the beach. All around him, hundreds and hundreds of starfish lay on the beach. As he walked, he picked up a starfish and tossed it back in the water. He continued doing this as he walked along the beach, picking up one, tossing it in the water, then picking up another and tossing it in the water. And so on and so on. Behind him, a man watched him and mumbled to himself and the little boy's efforts. He approached the little boy and said kindly, "son, there are hundreds and hundreds of starfish washed up on this beach! Don't you realize you can't possibly make a difference?" The little boy looked at him, picked up another starfish and tossed it back in the water. "I bet I made a difference to that starfish", he responded.

Person-centered planning (PCP) is an attempt to make a difference in the lives of individuals with disabilities – one person at a time. As such, it is a concept that many interagency teams have adopted and adapted to help them plan, implement, monitor, and evaluate their interagency efforts. PCP can help team focus on their goals, keep their eyes on the prize, by focusing on individuals and the impact of their interagency efforts on the lives of real people. Interagency teams are advised to learn about PPCP during the storming stage and to practice and refine its use during the norming and performing stages.

PCP may be defined as any one of a dozen or more value-based approaches for thinking about, communicating, with, assessing, planning for, and supporting people with disabilities. An approach may be described as being person-centered if it includes a number of critical values within its foundation. Typically, all PCP approaches have a common value base.

PCP activities:

- (a) are driven by the individual with a disability, family, and friends
- (b) focus on a person's gifts and capacities
- (c) are visionary and future-oriented
- (d) are dependent upon community membership and commitment
- (e) emphasize supports and connections over services
- (f) enable individualized plans to be developed
- (g) change services and systems to be more responsive to people.

### II. Components of PCP

#### Slide 4

All PCP models include three components:

- (1) "mapping" as a group graphics assessment and planning tool
- (2) development of support teams or circles of support
- (3) development of individualized action plans.

These components are comparable to the activities of any student-focused education or habilitation team, but they are approached in a different manner and use different tools.

In the interagency teaming model we are discussing in this class, student focused teams, such as IEP/statement of transition planning teams would use PCP components to develop more visionary, student-driven, and individualized teams. Interagency teams would request PCP “case study “data” and use the data to make decisions about what is and is not working in the local community and to drive systems change.

### III. “California Dreaming” and Visionary Thinking

Slides 5&6

The goal of this activity is to stimulate thinking about your students as adults. Working individually, think about one of your students or clients. Choose someone you know well and feel a special bond with. When you think about this person as an adult, where do you think of him or her living and with whom? Working and doing what? Spending free time doing what and with whom? You have five minutes. Begin now.

(After five minutes) What was easy about this activity? What was difficulty about this activity?

Consider this quote from a business management textbook: “Vision is a mental journey from the known to the unknown, creating the future from a montage of current facts, hopes, dreams, angers, and opportunities (Hickman & Silva, 1984). For individual planning teams, PCP is about getting to know a person, understanding the journey they have taken thus far in life and helping them define the journey they wish to take into the future. For interagency teams, PCP is about building the roads and bridges so that the journey will be easier for people with disabilities – one person at a time.

### IV. The Steps in PCP

Slide 7

All PCP approaches consist of three basic steps. These steps are similar to the steps any student-focused education or habilitation team, but again, they are approached in a different manner and use different tools.

Step one is an assessment step, gathering information through the use of tools and strategies such as “mapping” and other capacity-driven assessment activities. All PCP approaches provide a framework of maps to guide teams in getting to know a focus person, in helping him or her develop dreams. and in attaining these dreams. The maps include, for example, a background map, places maps, a relationships map, a choice map, a preferences map, and a dream map. There are many other maps to consider using. The choice of which maps to use will depend upon what you want to know about a focus person, what the focus person wants to know

about him or herself, the complexity of the person's dreams, and the focus person's characteristics. For example, a health and medical map or a communication map might be useful for some focus person, but not for others.

Step two is the development of an individualized action plan, using PCP tools and strategies to identify and mobilize community resources. PCP tools such as mapping are combined with effective teaming tools such as effective communication skills, brainstorming, and force field analysis to encourage creativity, problem solving, commitment, and mobilization of resources.

Step three is the implementation of the plan, using PCP tools and strategies to ensure involvement and follow-along support from the support team. PCP tools, such as the concept of "circles of support" are combined with effective teaming strategies, such as effective meeting strategies and action planning to ensure full participation and follow-through of all team members on action plan items and timelines.

#### V. Comparison of PCP and Traditional Planning

Slides 8&9

PCP approaches *are* similar to traditional individualized planning approaches in that they use teaming, assessment data, and individualized plans to support individuals with disabilities. But they are different in that they emphasize the roles of people with disabilities, their families, and friends; depend upon the mobilization of community resources; and operate without legal mandates.

PCP approaches demand that service providers, families, persons with disabilities, and their friends think in new ways about their roles and responsibilities. Specifically, everyone can play a role in assessment or getting to know the focus person activities. Everyone can play a role in determining the most appropriate goals and activities needed by the focus person to reach his or her goals. And everyone can and must play a role in guiding the focus person toward achieving his or her dreams. PCP approaches demand that everyone think about assessment tools in new and different ways. Specifically, everyone who knows a focus person well needs to play a role in sharing information about and personal and experiences with the focus person. Everyone needs to abandon traditional deficit thinking and focus on capacity thinking. Everyone can and must play a role in developing and implementing an action plan to guide the focus person toward realizing his or her dreams. PCP approaches recognize that action steps to be taken by the focus person's support team members are just as important as goal and action to be taken by the focus person. Last, PCP approaches demand that everyone be receptive to the need for systems change to support a focus person in realizing his or her dreams and that everyone can and must play a role in systems change.

## VI. PCP and Transition Planning

Slides 10-15

PCP and individualized transition planning are two separate planning processes, but one can reach into a toolbox labeled PCP, pull out some tools, and use them to make transition planning more effective.

The goal of this in-class activity is to discuss some scenarios about young adults with disabilities and strategize PCP responses to each scenario. (Assign one scenario to each of four groups.) Working in groups, read your scenario and discuss ways of addressing the scenario in a PCP manner. Consider: PCP tools and strategies, effective communication and meeting strategies, and other teaming strategies discussed during this course.

(Allow 15 minutes) What strategies would you use? How did your group reach this decision?

## VII. Translating Mapping “Data” Into Goals/Objectives

Slides 16-22

Anyone – family member, consumer, professional, or a community member may facilitate mapping. Once mapping information has been collected, the team must decide what to do with it. Mapping may be used outside of traditional disability service systems to guide focus persons toward realization of their dreams. It may be used by disability service systems to make their traditional assessment and planning activities more person-centered. Combining mapping information with traditional assessment and planning tools and strategies enables educators and rehabilitation professionals to make some of their activities more person-centered without, in all cases, committing to the extensive systems change activities required by comprehensive PCP approaches.

There are nine steps to consider adopting to make traditional plans more person-centered by adding mapping data. Step one is to create personal profiles of maps for all students. The personal profile should consist of those maps most meaningful to the assessment needs, student characteristics, and future plans of each individual student. Step two is to bring each student’s personal profile to all IEP and transition planning meetings. Students should play as active a role as possible in sharing their maps with the team. The maps should be posted in the planning room and referred to throughout the meeting whenever questions arise about assessment data, appropriate goals and objectives, and desired future goals. Step four is to discuss themes emerging from the maps –what seems to be working for the student? What does not seem to be working? Step four is to address the future vision or dream map. This map should be the driving force behind all decisions the team makes. Specifically, the team should ask themselves if an identified IEP goal or objective is appropriate for a student’s desired future dreams. If the team can not identify a relationship between an identified goal or objective and the student’s dreams, then the team must consider revising the IEP or revising the student’s dream. Step 5 is to begin thinking of mapping

information as programming data, that is, to consider mapping data as being as important and as useful as traditional assessment and evaluation data. Steps 6-9 guide the team through the traditional steps in developing an IEP and transition plan. The process, including updating of the maps, should be revised each year (or more often as necessary) prior to developing the IEP.

The goal of this in-class activity is to discuss some scenarios about young adults with disabilities and decide what PCP maps might be useful in each scenario. (Assign one scenario to each of four groups.) Working in groups, read your scenario and discuss the maps you think might be most appropriate to use.

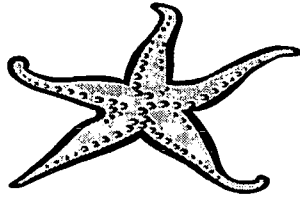
(Allow 20 minutes) What map or maps might you use? How would you involve families and students with disabilities? How would you integrate the information within their scenarios?

How did you team reach these decisions?

#### VIII. PCP Tools to Consider: Summary (Slide 23)

PCP approaches offer a number of tools that student-centered teams might consider using. They also offer a number of tools that interagency teams might consider using. These tools include those specific to PCP such as mapping, circles of support, and self-determination activities as well as those discussed in teaming literature such as team problem-solving, group action planning, and communication and meeting strategies.

Interagency teams must investigate what PCP activities are being conducted by student-focused teams in their communities and then discuss how they can use mapping and other PCP data to assist these teams in realizing their focus persons' dreams by guiding addressing systems change issues.



**Do you know the story of the little boy and the starfish?**

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## **WHAT IS PERSON-CENTERED PLANNING?**

“Person-centered” describes a number of value-based approaches for thinking about, communicating with, assessing, planning for, and supporting people with disabilities



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## **COMMON VALUES OF PCP**

- Driven by the individual, family/friends
- Focus on gifts/capacities
- Visionary/future-oriented
- Dependent upon community membership/commitment
- Emphasize supports/connections
- Enable individualized plans to be developed
- Change services to be more responsive

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## COMPONENTS OF PCP

- “Mapping” assessment and planning
- Teams or “circles of support”
- Individualized plans or action plans



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## “CALIFORNIA DREAMING”

*When I Think of My Student As an Adult, I Think of Him or Her...*

- Living where and with whom?
- Working where and doing what?
- Spending my free time doing what and with whom?

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**Vision is a mental journey from the known to the unknown, creating the future from a montage of current facts, hopes, dreams, angers, and opportunities.**



(Hickman & Silva, 1984)

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## THE STEPS IN PCP



- Gathering information through "mapping" and other assessment activities
- Creating a "future vision" and individualized plan
- Action planning and follow-along

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## COMPARISON OF PCP AND TRADITIONAL PLANNING

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| <ul style="list-style-type: none"><li>• A team meets annually to develop IEP</li><li>• The transdisciplinary team collects/interprets assessment data</li><li>• The student is invited to participate</li><li>• Parents are invited to participate</li><li>• The plan is legally mandated</li><li>• Implementation of the plan is ensured through the provision of entitlement services, due process/professional services</li></ul> | <ul style="list-style-type: none"><li>• A circle meets frequently</li><li>• The circle gathers, organizes/manages a personal profile /future vision maps</li><li>• The circle defines a role for the focus person</li><li>• Parents, other family members/general community members define the plan</li><li>• A future vision/action plan guide the circle's activities</li><li>• Implementation of the plan depends upon the circle's commitment/energy</li></ul> |
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## PCP DEMANDS NEW WAYS OF THINKING ABOUT:

- Service providers, families/friends
- Individuals with disabilities
- Gathering, organizing/interpreting information
- Developing/implementing individualized plans
- Monitoring/evaluating consumer outcomes
- Mechanisms for funding services

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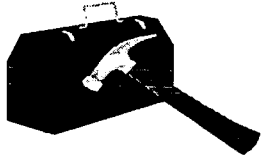
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## WORDS TO LIVE BY

PCP and transition planning are two separate planning processes, but one can reach into a PCP toolbox, pull out some tools and use them to make transition planning more effective.



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## PCP SCENARIOS: AN ACTIVITY



- Goal: To discuss and strategize a person-centered response to each situation
- Process: As a group, read and discuss for 15 minutes.

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## Person-Centered Transition Scenarios

Tito is an energetic 20-year old student with severe mental retardation, a vision impairment, and speech difficulties. He has had two successful vocational training experiences, one as a grocery bagger and one as a janitor. Tito repeatedly has told you, his , that he wants to work as a grocery bagger. You are confident that he can be successful in this job with support.

It is Tito's final IEP meeting before he leaves school. He has been accepted as a rehabilitation services client. A job developer from a local supported employment agency is at his meeting. Tito's grandmother is also at the meeting. It is the first IEP meeting she has attended in four years. She is very opposed to Tito accepting employment, telling the team that she needs his SSI check and that she needs him at home to help her. Tito is very upset and says he wants to work!

What would be an appropriate person-centered response to this scenario?

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### Person-Centered Transition Scenarios

Gary is an animated 17-year old junior who is both legally blind and deaf. He will graduate from high school next year. Gary dreams of becoming a famous Cajun chef and owning his own restaurant. He wants to attend culinary school after high school. His parents don't support this dream. Even though Gary enjoys cooking, they think being a chef is an impossible dream for Gary. His vocational rehabilitation counselor agrees and has suggested that Gary study accounting or some other business major at a local college and pursue a career associated with restaurants. You are his facilitator.

What would be an appropriate person-centered response to this scenario?

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### Person-Centered Transition Scenarios

Leroy is a bright, but impulsive 15-year old. He has a severe, degenerative vision impairment. Today, at his IEP meeting, his team is emphasizing his need to learn Braille and cane techniques. Leroy refuses to participate in Braille instruction classes and orientation & mobility classes. He says it is embarrassing to use a cane and says that he can see well enough to read large print at school. He tells the team that his most important goal is getting a driver's license and getting a part-time job so he can buy a car.

What would be an appropriate person-centered response to this scenario?

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### Person-Centered Transition Scenarios

Lyvette is a cheerful, but quiet 15-year old. She uses a wheelchair as a result of spina bifida and requires daily medications to control a number of related health concerns. She is an excellent student, but lacks confidence in speaking her opinion. Lyvette lives with her parents and two older sisters. She dreams of going to college, living in a dorm with other students, and studying to be an architect. Her parents want her to stay at home and work in her father's building supply business as a receptionist so they can watch over her health and personal care needs. Lyvette has talked with you, her math teacher, and she realizes she needs to take advanced placement math classes, and gain some volunteer or paid work experience to help her reach her goals. Her parents think she should take a computer class instead and tell her she does not even have to worry about working.

What would be an appropriate person-centered response to this scenario?

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## TRANSLATING MAPPING "DATA" INTO GOALS/OBJECTIVES

- 1 Create personal profile maps for all students
- 2 Bring maps to all future meetings
- 3 Discuss themes, things that work and things that don't work in the personal profile
- 4 Discuss the future vision map
- 5 Begin to think of mapping "data" as programming data

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## TRANSLATING MAPPING "DATA" INTO GOALS/OBJECTIVES (Cont'd)

- 6 Select environments/activities for instruction
- 7 Develop goals/objectives
- 8 For each goal/objective determine necessary components
- 9 Repeat this process each year

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## DEVELOPING MORE PCP SCENARIOS

- Goal is to review "data" and use it to develop a more person-centered transition component of the IEP
- Roles are to work in small groups (3-4 people) for 15 minutes
- Process is to read, discuss, share with large group



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**Person-centered Planning Scenarios**

You are a high school resource room teacher for seven students with severe/profound mental retardation. You are interested in using "mapping" to help their parents think about their future employment and/or living dreams and plans.

What map(s) might you use? How would you introduce the concept to the families? How would you involve the students? How would you integrate the information within their IEPs?

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**Person-centered Planning Scenarios**

You are a high school teacher for five students with severe and multiple disabilities. You are interested in using "mapping" to discover their vocational strengths, preferences, dreams, and support needs.

What map(s) might you use? How would you involve the students? Their families? How would you integrate the information within their IEPs?

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**Person-centered Planning Scenarios**

You are a high school teacher for eight students with emotional and behavioral disabilities. You are interested in using "mapping" to help them think about employment, make decisions about future job offers, and act upon their decisions when they are choosing future employment opportunities.

What map(s) might you use? How would you involve the students? Their families? How would you integrate the information within their IEPs?

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### Person-centered Planning Scenarios

You are a high school teacher for nine students with mild/moderate disabilities. You are planning an "Open House" for parents and families to discuss IEP planning and post-school opportunities.

You would like to use "mapping" to have students present their future dreams to their families. What map(s) might you use? How would you involve the students? Their families? How would you organize the event to keep students in the driver's seat, get families involved, share information, and problem-solve disagreements?

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### PCP TOOLS TO CONSIDER

- Mapping
- Self-determination curricula/activities
- Person-centered problem-solving
- Circles of support and teams
- Group action planning



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## Lecture 7: Conducting Needs Assessments

### I. Why Conduct Needs Assessments?

#### Slide 1

Conducting needs assessments is an important team activity of the storming stage. Before undertaking any decisions about team goals and activities, newly forming interagency teams must further define and assess their preliminary community need (i.e., the need that brought them together as a team). As time-consuming as these activities may seem to teams eager to begin working together, time spent clearly defining and assessing their needs is more likely to result in effective teams and long-term systems change. Comprehensive needs assessments make it easier for teams to mobilize resources and prioritize goals.

### II. Planning Needs Assessment Activities

#### Slide 2

The purpose of needs assessment activities is to provide additional information to confirm and clarify the preliminary need. Needs assessment data refine the community need and enhance the likelihood that teams will make databased decisions as they set goals and develop action plans. Needs assessment data can identify the status of current services, future service needs, consumer outcomes, and consumer satisfaction.

There are a number of planning questions that teams should consider as they plan needs assessment activities.

First, what is the identified preliminary need? Does the team know the need or does the team need to determine what the needs or needs are?

Second, the team needs to consider the goals of the needs assessment and how they will use the data. The team needs to consider what they want and need to know about this need: What does need look like and why is it a need? To what extent do constituents consider it a need?

Third, the team needs to consider what programs need to be assessed? For example, high schools, supported employment programs, housing programs, etc.

Fourth, what data do we need to collect: numbers receiving or waiting for services, outcomes, satisfaction, etc.

Fifth and sixth, how much money do we have to spend and how much time do we have? Needs assessments can be costly and time-consuming, but they do not have to be.



Seventh, and related to availability of resources, do we have the expertise? Many teams contract with a local university or external consultant to complete needs assessment activities.

Finally, what other data have already been collected that we can access and build upon?

### III. Common Needs Assessment Approaches

#### Slide 3

There are five common needs assessment approaches that interagency teams might consider (Everson, 1993).

The key informant approach requires the team to identify individuals in the agency or agencies being assessed who are in position to know the need. The advantage of this approach is that it is relatively easy and inexpensive. The disadvantage of this approach is readily obvious; frequently, identified key informants are core team members. Even when the key informants are persons with disabilities and their families, interviews by core team members may be difficult if the interviewers are service providers or decision-makers. For these reasons, teams may need to work with an external facilitator to conduct this approach. Telephone interviews, in-person site visits, and mailed interviews are all examples of the key informant approach.

The community forum approach is similar to the key informant approach in that it requires the team to identify those who know and understand the need. But instead of interviewing persons individually, they are brought together in one or a series of group meetings to discuss and share their ideas about the need. An advantage of this approach is again, the relative ease and low cost of the approach. In addition, the openness of the meetings and numbers of people who can provide input is an advantage. A disadvantage is the need for the forums to be open and flexible enough to allow safe and free exchange of ideas and beliefs. Careful facilitation is essential. An additional disadvantage is the time and expertise necessary to analyze the qualitative data. A final disadvantage is the frustration and excitement that might be generated by the forums – and the participants' expectations that their expressed needs will be addressed immediately by the team. For this reason, teams must be able to clearly introduce the goals and outcomes of the forums to all participants. Focus groups, town hall meetings, and other community meetings are all examples of the community forum approach.

The third approach is the rates-under-treatment approach. This approach requires the team to use a sample of consumer who have used a service or program to generalize to the needs of the larger community and consumer pool. An advantage of this approach is the generation of quantitative data. A disadvantage is the need to obtain an adequate sample and need to guarantee anonymity and confidentiality. Follow-up studies of former special education students and

studies of persons leaving state institutions for persons with disabilities are examples of this approach.

The fourth approach is the social indicators approach. This approach requires teams to review public documents and records to make inferences about the need. The advantage of this approach is that it uses existing databases. A disadvantage is that it can be time-consuming. In addition, it only provides indirect measures of a need and requires teams to make assumptions from existing data. Examples of this approach include a report on student dropout rates and a report on mortgage lending rates.

The last approach is the field survey. This approach requires teams to identify specific needs by conducting telephone interviews or through mailed surveys. This approach assesses more than just key informants; instead assessing a cross-section of people who make service decisions, provide services, and receive services. An advantage of this approach is that it is relatively time- and cost-efficient. It is also relatively easy to analyze the data. A disadvantage is the need to ensure adequate representation of all constituents in the sample in order to obtain valid data. An example of this approach is a telephone poll of voters and a mailed survey of consumer satisfaction following a medical appointment.

All five approaches have distinct advantages and disadvantages. They vary in their costs and other use of resources. They vary in their appropriateness for identified needs and audiences. Teams must review their preliminary needs, their available resources, and the goals of their needs assessments before choosing one approach or a combination of approaches to implement.

#### IV. Conducting Needs Assessments: an Activity

##### Slide 4

The goal of this activity is to develop a needs assessment plan to address an identified community need. The need I want you to address is: a lack of community-based and integrated employment options for transition-age individuals with severe and/or multiple disabilities. The process is to discuss the planning questions and five approaches we have discussed and to choose one or more approaches you think would be appropriate to address this need. Then develop a proposal to implement the proposed needs assessment activities. You have 20 minutes.

What approaches did you select? Why did you choose these? What activities, resources, and timelines will you need to conduct these activities?

**STORMING ACTIVITIES:  
CONDUCTING NEEDS  
ASSESSMENTS**

- The purpose of needs assessment activities is to clearly define the preliminary need(s) that brought the team together.
- Comprehensive needs assessments make it easier for teams to mobilize resources and prioritize goals.

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**PLANNING NEEDS ASSESSMENT  
ACTIVITIES**

- What is the identified preliminary need?
- What are the goals? How will we use the data?
- What programs do we need to assess?
- What data do we need to collect?
- How much money do we have to spend?
- How much time do we have?
- Do we have the expertise?
- What other data have already been collected?

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**COMMON NEEDS ASSESSMENT  
APPROACHES**

- Key Informant
- Community Forum
- Rates Under Treatment
- Social Indicators
- Field Survey

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**CONDUCTING NEEDS  
ASSESSMENTS: AN ACTIVITY**

- **Goal:** To plan a needs assessment to address an identified community need
- **Process:** Discuss suggested needs assessment planning questions and common approaches. Choose one or more approach and develop a proposal to implement the activities. You have 20 minutes.

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## Lecture 8: The Norming Stage

### I. The Norming Stage

#### Slides 1&2

The third stage of Tuckman's (1965) model is the norming stage. By the tenth, eleventh, or twelfth meeting, depending upon the size of the team, its identified needs and goals, and the frequency of its meetings, most teams will be able to progress to the norming stage. Teams will know they have reached the norming stage when they are able and willing to dedicate more time and resources to outcome goals than to team maintenance goals. That is, because they have team structural and meeting procedures, they will be able to pursue activities that address the need that brought them together. Team meetings will feel productive because goals have been set, agendas are being followed, communication is effective, and actions are being accomplished. Team members will feel satisfied because they understand the team's goals, their own roles and the roles of other team members, and they feel their ideas and work are valued. Reaching the norming stage does not mean that team members will never experience disagreement or engage in arguments. These events will occur, but during the norming stage, teams will be able to use effective communication skills, conflict resolution skills and other problem-solving techniques discussed in class and in your textbook to resolve them and move forward with team goals and actions.

During the norming stages, four descriptors may characterize teams.

First, the personal agendas of all team members are clear and out in the open. The relationships that team members have with each other have begun to deepen. Team members care about each other's feelings, actions, outcomes, and impressions.

Second, the team has completed all needs assessment activities and set goals to address the needs. The team has developed an action plan and the team's structure and processes enable the team to pursue its action plan.

Third, the team has defined leadership roles and responsibilities (e.g., co-chairs, recorders, treasurer, timekeeper, etc.) and members have been identified to play these roles effectively.

Last, the team has discussed and reached consensus on communication, conflict resolution, and meeting effectiveness strategies. Team processes enable teams to hold effective meetings, discuss problems as they arise, and reach consensus on possible solutions and actions. In sum, team members feel good about the team and the work they are accomplishing.

### II. Norming Activities: Developing Action Plans

#### Slide 3

Action planning is the driving force behind teams who have reached the norming stage. Action planning is a structured, yet flexible mechanism that enables teams to record identified actions necessary to accomplish their goals along with timelines, responsible team members, and monitoring and evaluation procedures.

Your textbook provides you with an example of an action plan form used by many teams, but any format that includes adequate space to record goals, objectives, activities, responsible personnel, timelines, and monitoring/evaluation procedures will be suitable.

Action planning is useful because it:

- (a) focuses the work of the team by setting long-and short-term priorities
- (b) identifies needed actions, timelines, responsible team members, and monitoring and evaluation procedures
- (c) schedules follow-up meetings
- (d) presents a forum for discussing both obstacles and opportunities, as well as failures and celebrations
- (e) provides a framework for team maintenance, systems, and case study goals
- (f) provides a written record of team actions and accomplishments (Everson & Guillory, 1998).

Action plans should be used to drive meeting agendas. That is, the action plan should be used to open and close meetings and to record suggested actions throughout the meeting.

### III. Force Field Analysis

#### Slide 4

There are many useful planning strategies to assist interagency teams in developing and implementing their action plans. Force field analysis (Lewin, 1951) is one strategy that has been used successfully by many interagency teams. Force field analysis is based on systems theory. Systems theory emphasizes the importance of viewing any department, program, organization, or community as an open model with numerous interdependent parts. Systems theory further assumes that stability is dynamic rather than static. A process of opposing and counteracting forces continuously impacts stability. Systems change can only occur when these forces shift, and as a result, change the system's stability.

Teams can use Lewin's ideas to discuss and problem-solve issues arising out of their action planning. Force field analysis can assist a team in moving forward, by focusing energies on strengthening existing resources to overcome barriers or problems.

Imagine a car stuck on an icy road during a winter storm. As the driver attempts to move forward, the front tires (restraining forces) spin on the ice as the rear wheels (driving forces) attempt to move the car forward. Unless the driver can summon enough energy to move the car forward (make the driving forces stronger than the restraining forces), he or she will waste valuable resources (e.g., gas, time, sense of humor) attempting to reach the goal. In this scenario, the

restraining forces and the driving forces have created a force field that must be changed before the drive can move forward.

Sometimes this same thing happens to teams. They become stuck in a force field of driving forces and opposing forces. They are unable to move forward toward their goals because they perceive the restraining forces as being more powerful than the driving forces. For example they may feel that the number of students exiting special education each school year makes person-centered planning impossible. Or they may feel that a lack of public transportation options makes employment outcomes impossible for young adults with severe disabilities. Or they may feel that family need for Social Security benefits makes employment impossible for some young adults with disabilities. And so on and so on. When this happens, force field analysis can help them move forward.

Force field analysis asks teams to restate their need and desired solution. Then to identify case studies, the names of actual people, who are impacted by the need and solution. Using these people as examples, the team next brainstorms a list of driving forces or supports that move the team toward actions that enhance the opportunities of these individuals to have their needs met. At the same time, the team brainstorms a list of opposing forces or barriers that inhibits the team from taking actions that would enhance the opportunities of these individuals to have their needs met.

Driving forces are the resources, supports, and reinforcers that teams can potentially use to implement a desired solution. Driving forces might include, but not be limited to, the existence of the interagency team, family and self advocacy groups, the existence of certain policies or procedures, the existence of university-sponsored faculty or projects, local employers, existence of local transportation options and so forth.

Restraining forces are the barriers or problems that teams can identify as reasons a desired solution is not currently in place. Restraining forces might include the absence of certain policies or procedures, a high unemployment rate, lack of accessible or weekend transportation, waiting lists for certain services, and so forth.

Teams should then spend some time discussing the relationship between the driving and restraining forces. This step includes a discussion of how the identified driving forces can be strengthened and the restraining forces minimized. In most cases, during this discussion, teams will identify a variety of strategies ranging from personnel training and technical assistance, reallocated funding, exemptions to eligibility or assessment criteria, and revision of existing policies and procedures. These strategies now become process or outcome goals with action to be recorded on the action plan and pursued by appropriate team members.

Can you see how force field analysis might be useful to you in the work you do? Who can give me an example of a team or group of people being stuck? (Illustrate the process of force field analysis with an identified problem.)

#### IV. Developing Action Plans: An Activity

##### Slide 5

The goal of this activity is to develop an action plan to address an identified community need. Using the need we discussed in class last week (i.e., a lack of community-based and integrated employment for young adults with physical and/or sensory disabilities), work in your groups to discuss and reach consensus on at least one team process goal and two outcomes goals to address this need. Remember, a process goal results in a stronger more effective team. Whereas an outcome goal results in measurable, observable changes in the target consumer population. You have 15 minutes. Begin now.

(After 15 minutes), what goals did you reach consensus on? What teaming processes did you use to reach consensus on these goals? How would your team address the next step of action planning, that is, identifying activities around these goals?

#### V. Norming Activities: Maintaining a Team's Direction and Focus

##### Slide 6

Reaching the norming stage is cause for an interagency team to celebrate. However, maintaining performance at the norming stage can be difficult. Teams will need to attend to key activities in order to maintain their direction and focus.

One way to do this is for the team to conduct a regular, systematic self-review or self-assessment. This may be done during a regular meeting or an annual or as needed more frequent basis.

At least once a year, interagency teams should:

- (1) review their value and mission statements
- (2) review their needs-assessment data and action plan data
- (3) review their goals and desired solutions
- (4) review their membership
- (5) review the approach to systems change they have adopted, that is, the use of a collaborative teaming model
- (6) review their action plan goals, actions, timelines, and responsible team members to ensure that they are moving forward toward their desired solutions.



## Stages of Team Development



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### CHARACTERISTICS OF THE NORMING STAGE

- Personal agendas are clear and the relationships that team members have with each other begin to deepen.
- Team goals are set and action plans are being pursued.
- Leadership roles are operational.
- Communication, conflict resolution, and meeting strategies are operational.

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### NORMING ACTIVITIES: DEVELOPING ACTION PLANS

- Team mission statement
- Names of team members
- Process goals and outcome goals
- Actions
- Timelines
- Responsible team members
- Monitoring/evaluation procedures

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**NORMING ACTIVITIES: USING  
FORCE FIELD ANALYSIS**

- Restate community need.
- Restate desired solution.
- Identify case study individuals.
- Identify driving forces or supports.
- Identify restraining forces or barriers.
- Identify outcome goals.
- Identify process goals.

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**DEVELOPING ACTION PLANS:  
AN ACTIVITY**

- **Goal:** To develop an action plan to address an identified community need
- **Process:** Discuss and reach consensus on at least one team process goal and two outcome goals to address the identified community need. You have 15 minutes.

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**NORMING ACTIVITIES:  
MAINTAINING A TEAM'S DIRECTION  
AND FOCUS**

- Review the team's value base and mission statement.
- Review needs-assessment and action plan data.
- Review the team's goals and desired solutions.
- Review the team's membership.
- Review the systems change process.
- Review the action plan.

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## Lecture 9: The Performing Stage

### I. The Performing Stage

#### Slides 1&2

The final stage of Tuckman's (1965) model is the performing stage. This is the highest level of team functioning. Many teams will never reach this stage, but those that do may take as long as 30-48 months or 25 or more meetings to do so.

Performing teams recognize that no one member can do the team's work alone; they value the work required to build and maintain the team because they see outcomes greater than those occurring before the team's existence. They understand the oft-quoted adage, "TEAM: Together everyone achieves more." As a result, individual members are proud of the team. They speak positively of their experiences and are able and willing to address both internal and external threats. Teams are able to self-monitor and self-evaluate their work. Teams will know they have reached this stage when they are able and willing to maintain and even potentially expand their efforts even in the presence of external driving forces (e.g., budget cuts, waiting lists, changes in agency leadership resulting in lack of support for team efforts) and in the absence of previous driving force (e.g., grant awards, state mandates, family and consumer advocacy efforts). An example would be a local interagency team that continues its work and even thrives long after grant-funded technical assistance or fiscal support has been removed.

### II. Models of Interagency Collaboration

#### Slides 3&4

Interagency collaboration is often embodied in a written interagency agreement. These documents should be an outcome of teamwork, that is, a product created by the team to illustrate its work and accomplishments. Alternatively, interagency agreements may be less effective when they are written early in the forming or storming stage and then used to force or monitor the team's interagency activities.

Interagency agreements addressing transition and supported employment services and outcomes generally follow one of three broad models (Wehman, Moon, Everson, Wood, & Barcus, 1988).

(Provide examples of each of these models of written interagency agreements for students to review.)

First, they may simply describe interagency policies and procedures for communicating and sharing information. These types of agreements are nothing more than agreements to agree to work together to do the work the participating agencies are charged with doing. They often assure federal or state legislative mandates and offer evidence of collaborative relationships to families, consumers, and agency employees.

Second, interagency agreements may describe policies and procedures for collaboratively planning services and implementing services. They may describe

unique activities, beyond what they are required to do. For example agencies may agree to conduct interagency needs assessment activities and collaborative annual plans. They may agree to co-sponsor an annual statewide conference. They may agree to collaborate in delivering a specific service by sharing assessment and evaluation data, by establishing a single point of entry for services, or by sharing discipline-specific or agency-specific roles and information.

Third, interagency agreements may describe collaborative resource sharing for a specific service. For example, agencies may agree to co-fund personnel such as job coaches or co-fund services such as supported employment.

A team or group of people functioning at the forming stage can develop the first model of interagency agreement. The second and third models of interagency agreement require teams to have consensus on the community need, to practice effective communication and conflict resolution, and practice self-monitoring and –evaluation. Team members must understand personal and agency agendas, trust each other and be willing to take risks. They must be able to see that the work of the team, in contrast to the work of individuals, will result in better consumer outcomes.

### III. Teamwork Questionnaire: An Activity

#### Slide 5

Don Clark, a proponent of Tuckman's work developed a simple to use teamwork questionnaire (<http://www.nwlink.com/~donclark/leader/teamsuv/html>). This questionnaire can be completed by individuals or by teams to help them identify their level of team functioning and then develop an action plan to address activities appropriate for their stage.

We have spent a lot of time in this class working in groups to pursue interagency activities. Over the semester, your groups have begun to experience many of the developmental growing pains of interagency teams. You have adopted many of the teaming strategies we have discussed in class to support your effectiveness in accomplishing these activities. Using the "Teamwork Questionnaire", work as a group to respond to each question with the most appropriate response. Tally the items and discuss the stage of functioning illustrated by your team. You have 20 minutes begin now.

(After 20 minutes) Were you surprised by your team's results?

Why or why not?

Did you agree or disagree with each other when you scored statements?

What team activities did you use to accomplish the activity's goal?

What actions should your team pursue if you were going to continue to work as a team?

## Stages of Team Development

### PERFORMING



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### CHARACTERISTICS OF THE PERFORMING STAGE

- Team recognizes that no one member can do the team's work alone.
- Team is able to self-monitor and self-evaluate its work.
- Team is able and willing to maintain and potentially expand its efforts even in the face of external pressures.

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### MODELS OF INTERAGENCY COLLABORATION

- Communication and information sharing
- Service planning and implementation
- Resource sharing

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**INDICATORS OF INTERAGENCY  
PERFORMING**

- Established key positions w/in LEAs and adult services agencies
- Sufficient agency personnel to cover regions
- Jointly funded personnel positions
- Interagency team meetings
- Written policies/procedures
- Interagency agreements
- Self-monitoring/self-evaluation
- Cross-agency personnel training
- Sense of caring and involvement

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**TEAMWORK QUESTIONNAIRE:  
AN ACTIVITY**

- **Goal:** Using the “Teamwork Questionnaire”, identify the stage in which your team is functioning.
- **Process:** Respond to each question with the most appropriate response. Tally the items and discuss: What stage is our team in ? What do we need to do? You have 20 minutes.

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## **Lecture 10: Teaming: From Concept to Practice**

### I. Teaming: from concept to practice

Slides 1 & 2

Throughout this semester, we have emphasized the use of teams in bringing about interagency systems change and the developmental stages and activities pursued by effective interagency teams. To summarize what we have learned thus far, there are nine characteristics of effective interagency teams (Everson & Rachal, 1996) identified by the authors in a qualitative study of interagency teams in 17 states.

Effective teams have clear elevating goals. That is, goals that are aligned with the identified need or needs. Goals that are measurable and observable. Goals that are visionary, elevating, taking the team into a future desired state of affairs.

Effective teams have external support and recognition. Their sponsoring agencies and organizations support members. Teams are recognized because they have names, brochures, mission statements, newsletters, videotapes, make presentations at state conference and meetings, have earned awards, and/or mentor other newer teams.

Effective teams have defined, complete membership. Members know who is and who is not a member. All core stakeholder agencies and organizations are represented. Members understand their roles and the roles of their teammates.

Effective teams have common values and missions. They have spent time discussing and exploring the service delivery and teaming values that are important to them. They have articulated this into a written statement. Likewise, they have spent time discussing and exploring the reasons they have come together as a team and the expectations they have of the team. A value statement describes what the team believes; a mission statement describes why the team has agreed to work together. Effective teams use these statements to anchor their work: if this is what we believe, can we support this service or this program? If this is why we came together as a team, can we or should we pursue this goal or action?

Effective teams have principled leadership. Team roles, such as co-chairs are clearly defined, and members respect and support the leadership attributes evidenced by their leaders. Likewise, all team members are perceived by other team members as competent. Members bring information on service delivery and valued practices to the team. Members bring operational team skills to the team. Members recognize each other's strengths and weaknesses and the contribution each member makes to the team.

agent, things he or she can control. The middle sphere contains those needs over which an individual has little or no control, but can influence in some way. The third sphere contains those needs over which an individual has not control or influence. Individuals should actively pursue needs in the sphere closest to them and build alliances or support (teams) in the second sphere. Needs in the second sphere should only be addressed if other stakeholders are interested in joining with the individual to address them. Needs in the third sphere should only be tackled by interagency teams.

What needs are contained in your personal sphere of influence? Working individually, choose one specific interagency work problem. Using Hultgren's model, break the issue down into major parts or needs. Assign each part or need to the appropriate sphere. You have 15 minutes. Begin now.

(After 15 minutes) What actions might you take to address those needs in your first sphere of influence?

What actions might you take to influence those needs in your second sphere of influence?



## Local Education Agency Case Study

(To accompany lecture 10/activity)

Five years ago, in response to state-agency mandates, representatives from LEA 2 and the local vocational rehabilitation office agreed to establish a local-level collaborative interagency team. Although many of the initiation and organizational activities were similar to those addressed in Case Study 1, several differences are worth highlighting. First, membership was different. The initial team was broader and included directors from the school district, vocational rehabilitation services, a regional family advocacy/outreach agency, and the local office of mental retardation/developmental disabilities. The representative from vocational rehabilitation services agreed to serve as the initial team chair. Second, the team identified transportation and housing as the preliminary needs and identified a broader population of all transition age youths. Several similarities between this team and the one in Case Study 1 are also worth noting. Both teams recognized the value of initial team activities, such as sharing information about program and agency services, discussing roles, conducting needs assessments, setting goals and anticipated outcomes, and developing action plans.

Although the initial organizational meetings of this team were successful, some problems became evident as the team moved into the storming stage. Some team members were unable or unwilling to move beyond their personal agendas, to communicate effectively, or to resolve conflict. As a result, tension and mistrust emerged. Value and mission statements were not articulated and the team lacked a foundation. Although annual goals and related activities were established, long-term goals were unclear. Membership was never confirmed and the roles and responsibilities of individual team members and their agencies remained vague. As a result, meeting attendance was inconsistent.

Despite these storming problems, the team continued to meet on a monthly basis and to develop operating procedures. While negotiating the logistics of these monthly meetings, the team members agreed that when the meetings were held at any of their agencies, the respective member was likely to be interrupted and/or distracted because of in-house agency issues. In order to ensure uninterrupted meetings, they agreed to hold the core team meetings away from all of their offices at a cost-free location within the community.

Although the previously mentioned actions improved meeting effectiveness, other problem areas continued to surface. Written agendas were not typically developed before meetings. As a result, the meetings often were disorganized and unproductive. The team chair agreed to develop agendas and distribute them to members ahead of time. However, despite agendas, some members consistently ignored them and monopolized meetings with their own agendas. The team chair seemed unable to facilitate good communication, resolve conflict, or focus the team's activities on action plan items. In anger, the chair resigned and a new chair was elected. In addition, for the first time, the team elected a recording secretary and identified a timekeeper.

The newly elected chair was perceived by the team as a leader, able to guide the team toward the development of value and mission statements, to assist the team in setting and attaining goals, and to facilitate communication and resolve conflict. Commitment and collaboration from the former chair became problematic as he began to miss most meetings. Meeting effectiveness was hindered as other team members became resentful of spending time updating him on the activities and decisions of previous meetings. It seemed that the current operating procedures for

documenting the activities and decisions that occurred at the team meetings were not effective. Unfortunately, the team took no specific steps to address this issue.

After 9 months, the team decided to evaluate its efforts. They were disappointed to find that most of their initial goals had not been accomplished and that their needs had not been addressed. Although some members suggested that additional members might be needed to accomplish the targeted goals, a unanimous decision could not be reached on this suggestion. Two team members refused to agree to expand the membership of the team. As a result, many other team members felt overextended and resentful. Other team members suggested revising the team's goals or extending the timelines for the goals. Once again, the team was unable to reach consensus.

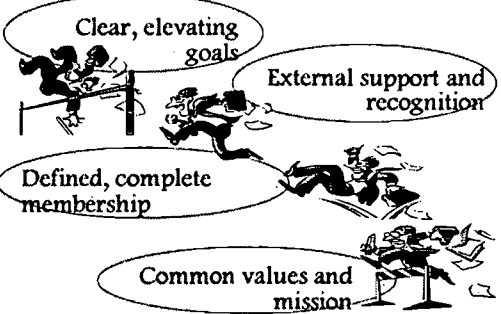
After a year of working together, most team members were complaining that their efforts were fruitless. But they were unable to determine how to redirect their efforts. Once again, the team evaluated its efforts. Despite low morale and personal conflicts among some of the members, the team decided to conduct another needs assessment and to prioritize new goals and related activities. Other storming issues, that is, value and mission articulation, operating procedures, and communication remained unresolved.

Over the next 2 years, several events occurred that took their toll on the team. Two of the original team initiators left the team, one because of a job transfer and the other because of a request to be replaced on the team by another representative of her agency. These membership changes were disastrous. What few verbal agreements had been reached between the agencies regarding the delivery of transition services were now subject to renegotiation. The resulting written agreements were not as effective as the initial verbal agreements and they were never officially signed. In addition, one of the replacement team members lacked background and experience in transition services. Because the team still lacked written guidelines regarding the delivery of transition services, the team's efforts floundered while they tried to familiarize this person with the transition process. Then, another membership crisis occurred. After consistently requesting that the team secure additional family representation, the director of the family advocacy/outreach agency withdrew the agency from team membership. And, finally, because newer members, including the providers of community services, for example, the local housing authority and public transportation agency, remained unclear about their roles and anticipated outcomes of the team, they began discussing leaving the team.

#### Reference

Everson, J.M., & Guillory, J.D. (1998). Building statewide transition services through collaborative interagency teamwork. In F.R. Rusch & J.G. Chadsey (Eds.), Beyond high school: Transition from school to work (pp.311-312). Belmont, CA: Wadsworth Publishing company.

### TEAMING: From Concept to Practice



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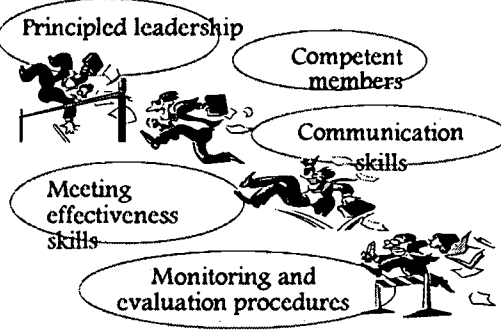
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### TEAMING: From Concept to Practice



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### STRATEGIES FOR BRINGING ABOUT CHANGE WITHOUT TEAMS

- Develop knowledge/experiences about teaming/systems change.
- Identify a need/desired solution.
- Develop a framework for implementing change.
- Present the plan to key individuals/for support.

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**STRATEGIES  
FOR BRINGING  
ABOUT CHANGE  
WITHOUT TEAMS (Cont'd)**

- Revise/finalize the plan.
- Begin implementation. Build alliances.
- Monitor progress. Share progress with key individuals.
- Assess results.
- Develop/present a plan for expansion or continuation of program.

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**SPHERES OF INFLUENCE**

- What things can I control?
- What things can I influence?
- What things can I neither control or influence?

Hultgren, 1989



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**ACTIVITY: DETERMINING MY  
SPHERES OF INFLUENCE**

- **Goal:** To assess your individual spheres of influence around a specific interagency work problem
- **Process:** Working individually, choose one specific interagency work problem. Using Hultgren's model, break it down into its major issues and assign each of them to one of the three most appropriate levels. What actions might you take to address those issues within your control or influence? You have 15 minutes.

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# INTERAGENCY COLLABORATION QUIZ #1

Name: \_\_\_\_\_

Score: \_\_\_\_\_/50 points

Directions: You may use your notes, handouts, textbook, and/or the Internet to respond to the following questions. Read each question carefully and respond fully to all components. Please type your responses. You may use additional pages.

1. Identify two reasons that it is appropriate for educators/adult service providers to complete a course addressing issues and strategies associated with interagency collaboration. For each reason you cite, support your response by discussing literature and legislation discussed in class and by describing a recent professional experience you might have addressed differently if you had known more about issues and strategies associated with interagency collaboration. (20 points)
2. Tuckman (1964) proposed a four-stage model of teaming that might be applied to the work we do in education/adult services. Discuss the first two stages (i.e., forming and storming). For each stage, discuss two appropriate activities a team should accomplish and describe a recent personal or professional teaming experience that illustrates either the team's successful accomplishment of the activity or the team's need to address the activity. (30 points)

## INTERAGENCY COLLABORATION QUIZ #2

Name: \_\_\_\_\_

Score: \_\_\_\_\_/50 points

Directions: You may use your notes, handouts, textbook, and/or the Internet to respond to the following questions. Read each question carefully and respond ***fully*** to all components. Please type your responses. You may use additional pages.

1. Describe two characteristics of interagency teams one would expect to see emerge during the norming stage of teaming. For each characteristic, describe one interagency teaming activity, teams should consider pursuing to guide them through the stage. If you were chairperson of an interagency team, how would you implement each of these activities? (20 points)
2. Describe the advantages and disadvantages of each of the five needs assessment approaches discussed in class. If you were chairperson of an interagency team convened to address lack of family involvement in the IEP development of adolescents with disabilities in your school district, which approach(es) would you consider using and how would you implement the approach(es)? (20 points)
3. Identify two interagency teaming strategies we have discussed in class that you will consider adopting in you work as an educator or in your civic, community or church activities. Describe what you will do as a team or as an individual to implement the strategy. (10 points)

# **INTERNSHIP COURSE**

## **Table of Contents**

- 1 Course Syllabus/Assignments
- 2 Lecture 1 Essential Practices: Internship Ideas
- 3 Lectures 2-4 Individual Student Conferences/Student Presentations

Dear Colleague:

The goal of this course, "*Internship*", is to provide students with a structured opportunity to individually design and complete a culminating project addressing interagency transition and/or supported employment services and supports. The goal is to be accomplished through a semester-long course using individually agreed-upon contracts of activities between the instructor and students, assigned course readings, and instructor and peer feedback.

This packet includes a comprehensive set of materials designed to support the teaching of this course. The packet is divided into two sections: (1) a sample course syllabus/course assignments; and (2) sample lecture notes and PowerPoint slides.



# **INTERNSHIP COURSE**

## **Table of Contents**

- 1 Course Syllabus/Assignments
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**Course Syllabus/Assignments**

**INTERNSHIP**

## Course Description

**1.0 Goal of Course:** The goal of this course is to provide students with a structured opportunity to individually design and complete a culminating project addressing interagency transition and/or supported employment services and supports. To accomplish this goal, each student will develop a contract with the instructor detailing 90 hours of activities with one agency or organization addressing interagency transition and/or supported employment services and supports and complete all contracted activities. The contract must describe in detail a permanent product that will result from the 90 hours of activities.

**2.0 Relationship to Conceptual Framework:** This course contributes to developing excellent professionals by focusing on the strands and associated learning outcomes of knowledgeable, reflective and responsive teachers, and effective practitioners. Upon completion of this course, successful students will be able to:

1. Identify and implement effective and collaborative interagency practices among specific community services and supports relevant to individuals with disabilities and their families [CC1.K5, CC7.K1, CC7.K2, CC7.K4, CC7.K5, CC7.S1, CC7.S2, CC7.S3, MR4.K2, MR7.K1];
2. Identify and implement effective, collaborative, and culturally-sensitive practices for enhancing the involvement of individuals with disabilities and their families and respectful and beneficial relationships between families and professionals [CC1.K2, CC4.S6, CC7.K2, CC7.S4, MR4.K3, MR7.S1, MR5.K1];
3. Identify and implement effective and collaborative interagency transition planning and services driven by each individual student's wants and needs for post-school services and supports [CC1.S2, CC4.S10, CC7.K4, CC7.S5, MR4.K3, MR5.K1];
4. Identify and implement effective and collaborative curricula development and co-teaching practices in general, special, and vocational education settings [MR7.S1];
5. Identify and implement effective instructional practices (e.g., teaching skills which will enhance students' self-determination and participation and inclusion in their families, schools, and communities) [CC4.S10, MR4.K3, MR4.S6, MR5.K1, MR6.S1];
6. Conduct professional activities consistent with legislative and regulatory provisions related to federal, state, and local education, rehabilitation, disabilities, social services, social security and labor services [CC1.S2, CC3.K3, CC3.K7, CC3.K9];
7. Contact, interview, and observe professionals employed within various agencies and organizations providing interagency services to individuals with disabilities and their families in order to assess the scope and quality of interagency services [CC4.S9, MR7.S1]; and

8. Demonstrate a commitment to developing the highest educational and quality-of-life potential of individuals with disabilities [CC8.S1]

### **3.0 Course Requirements:**

**1.1** Development of a proposal detailing: 1) name of agency or organization within which activities will be completed; 2) a comprehensive set of proposed activities addressing transition and/or supported employment services (See Appendix A for sample activities); 3) a proposed schedule and/or hourly accounting of activities from initiation to completion; 4) detailed description of a product resulting from the activities; and 5) proposed monitoring and evaluation criteria. Upon approval of instructor, this proposal will serve as each student's individual contract for the course. (See Appendix B for proposal format.)

**1.2** The proposal is due the second course session.

**1.3** Attendance and participation in three course sessions All contracted materials are due the final course session.

**1.4** Frequent and regularly scheduled e-mail and/or telephone communication with instructor throughout course to monitor progress, solicit assistance and receive feedback.

### **4.0 Grading.**

**4.1** Initial proposal is worth 50 points and is due the second course session.

**4.2** Proposal materials and evidence of participation are worth 50 points and are due the third course session.

**4.3** Internship permanent product is worth 100 points and is due the third course session.

**4.4 Final grades.** Final grades will be assigned according to the total number of activities proposed and the quality of and percentage of activities accomplished. Grades will be assigned as follows:

A = 90% or above

B = 80% - 89%

C = 70% - 79%

U = 69% or below

All contracted materials are due to me by the third course session. **Materials received after 5PM on this date will be reduced a letter grade.**

**4.5 Grade of "I".** I follow the policy stated in the UNCC catalog which reads as follows: "The grade of "I" is assigned at the discretion of the instructor when a student who is otherwise passing has not, due to circumstances beyond his/her control, completed all the work in the course. The missing work must be completed during the next semester (fall or spring) in residence, but no later than 12 months after the term in which the "I" was assigned, whichever comes first. If the "I" is not removed during the specified time,

a grade of "I" or "N" as appropriate is automatically assigned. The grade of "I" cannot be removed by enrolling again in the same course." (p. 29)

**4.6 Academic Integrity Statement.** Students have the responsibility to know and observe the requirements of The UNCC Code of Student Academic Integrity (Catalog p. 336-337). This code forbids cheating, fabrication or falsification of information, multiple submission of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluation in this course include a judgement that the student's work is free from academic dishonesty of any type; and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be expelled from UNCC. The normal penalty for a first offence is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

**5.0 Text:** No text is required for this course. However, as appropriate to accomplish proposed activities, the instructor may assign each individual student readings.

**6.0 Course schedule.** Classes will be scheduled on an individual basis as follows: 5/22 Telecast for all students; 6/5 Telecast for all students; 6/19 Class for Greensboro students only; 6/26 Class for Elizabeth City students only; 7/17 Class for Charlotte students only; and 7/24 Class for Fayetteville students only. Observations of and /or meetings with individual students may be scheduled on as individual basis as appropriate.

**7.0 Proposal.** Each student shall develop a proposal detailing: 1) name of agency or organization within which activities will be completed; 2) a comprehensive set of proposed activities addressing transition and/or supported employment services (See Appendix A for sample activities); 3) a proposed schedule and/or hourly accounting of activities from initiation to completion; and 4) proposed monitoring and evaluation criteria. Upon approval of instructor, this proposal will serve as each student's individual contract for the course.

## **APPENDIX A**

### **SAMPLE INTERNSHIP ASSIGNMENTS COMPLETED BY STUDENTS**

- 1.** Design a classroom unit for elementary or middle school students on career education. Include daily or weekly lesson plans for unit with description of activities, materials, readings, guest speakers (as appropriate), student assignments, and grading criteria.
- 2.** Design a classroom unit for middle school or high school students on self-determination. Include daily or weekly lesson plans for unit with description of activities, materials, readings, guest speakers (as appropriate), student assignments, and grading criteria.
- 3.** Design a classroom unit for elementary, middle, or high school students that develops skills in one of the recommended transition planning areas (e.g., recreation, financial planning, independent living, postsecondary education, transportation, health and medical issues, etc.). Include daily or weekly lesson plans for unit with description of activities, materials, readings, guest speakers (as appropriate), student assignments, and grading criteria. Also include a description of why you believe this unit will enhance the postsecondary outcome of students with disabilities and their families.
- 4.** Design an "Open House" or a comparable event for transition-age students and their families to prepare them for upcoming individualized transition planning activities. Include sample invitational materials, sample agenda, description of invited adult agency participants (as appropriate), mechanisms for involving students, and sample follow-up procedures.
- 5.** Conduct an analysis of one occupational cluster in your community and conduct employer contacts and job analyses for at least three employers and positions within this occupation. Include a description of how you conducted the community analysis, copies of employer contact logs, copies of job analyses, and a detailed description of how you will use this information to benefit your classroom or agency's services.
- 6.** Develop videotape, slide show or other mechanism to inform students and/or their families about transition services and/or supported employment services. OR revise a comparable product that already exists in your community to make it more appropriate for a specific population of students or culturally/linguistically diverse families.
- 7.** Develop videotape, slide show or other marketing materials to use with potential employers to market students with disabilities as potential employees. Be prepared to provide me with a copy of the final product.
- 8.** Conduct a literature review and write a position paper detailing essential practices and professional roles, on one specific aspect of transition services. For example, cultural diversity, adolescent rites of passage, family roles, self-determination, inclusive education at the high school level, alternative assessments, etc. Paper must include at least 10 literature citations, evidence of an Internet search, and evidence of an interview with at least one expert in the area. Paper should be approximately 20 pages in length and follow APA format and guidelines.

Activity to Accomplish Product	Timeline for Completion/ Hours Required for Completion	Monitoring/Evaluation Outcome

Instructor's Signature: \_\_\_\_\_

Student's Signature: \_\_\_\_\_

**APPENDIX B**

**PROPOSAL FORMAT**

Student Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Name of Site Where Proposal  
Activities will be Completed: \_\_\_\_\_

Detailed Description  
of Permanent Product: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**ESSENTIAL PRACTICE:  
INTERNSHIP IDEAS**

- Standards-Based Education
- Alternative Assessments
- Student Self-Determination
- Transition Planning
- Lifelong Education and Careers
- Broad-Based Team Collaboration

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**STANDARDS-BASED EDUCATION**

- IDEA 97 mandates focus attention on including *all* students in regular education curriculum/assessments
- Inclusion of standards-based IEP goals/objectives
- Understanding the district's standards/development of inclusive ed procedural guide
- Development of assessment guidelines and alternative assessment mechanisms

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**STUDENT SELF-DETERMINATION**

- Development of student knowledge, skills, and behaviors
- Creation of opportunities for behaving in a self-determined manner
- Allocation of resources to support self-determined behaviors

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**TRANSITION PLANNING**

- Employment and careers
- Postsecondary education
- Transportation
- Living arrangements and skills
- Health and medical
- Legal and advocacy
- Recreation and leisure
- Community participation

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**LIFELONG CAREER EDUCATION**

- Value of work and careers for all persons
- Career awareness and exploration
- Career experiences
- Lifelong education and career pursuits

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**BROAD-BASED TEAM  
COLLABORATION**

- Change in educators' roles from isolation to interaction
- Emphasis on teaming across agencies and disciplines
- Change in parents' and students' roles from passive to active

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Office of Educational Research and Improvement (OERI)  
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