

## TRANSITION PLANNING AND STUDENT-LED TRANSITION MEETINGS

As a student with disabilities moves into the teen years, the IEP focuses more on the interests of the student and what he or she hopes for the future, and it is the IEP team's responsibility to create a transition individualized education program to support those interests.

Transition, in reference to individuals receiving special education services, is defined as a coordinated set of activities for a student with a disability that:

- Is designed to be within a results-oriented process, that is focused on improving the academic and functional achievement of the student with a disability to facilitate the student's movement from school to post-school activities, including postsecondary education, vocational education, integrated employment (including supported employment); continuing and adult education, adult services, independent living, or community participation;
  - Is based on the individual student's needs, taking into account the student's strengths, preferences, and interests; and
  - Includes instruction, related services, community experiences, the development of employment and other post-school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation.

[34 CFR 300.43 (a)] [20 U.S.C. 1401(34)]

The student's IEP must be updated, prior to their 16<sup>th</sup> birthday (or younger if deemed appropriate by the IEP Team), to include the following transition components:

- Appropriate measurable postsecondary goals based upon age-appropriate transition assessments related to training, education, employment and, where appropriate, independent living skills;
- The transition services (including courses of study) needed to assist the student in reaching those goals; and
- Beginning not later than one year before the student reaches the age of majority under state law (18 in California), a statement that the student has been informed of the student's rights under Part B, if any, that will transfer to the student on reaching the age of majority, must be included in the IEP.

The LEA/district must invite the student with a disability to attend the student's IEP Team meeting if a purpose of the meeting will be the consideration of the postsecondary goals for the student and the transition services needed to assist the student in reaching those goals.

If a purpose of a student's IEP Team meeting will be the consideration of postsecondary goals for the student and the transition services needed to assist the student in reaching those goals, the LEA/ district must invite a representative of any participating agency that is likely to be responsible for providing or paying for transition services to attend the student's IEP Team meeting.

### Overview of Transition Planning

Collaborate closely with the student through each step of the process:

- **Transition Assessment:** Conduct age-appropriate assessments to determine interests, aptitudes and areas of need.
- **Assessment Results:** Describe student's strengths and present levels of performance, achievement, and functioning.
- **Measurable Postsecondary Goals:** Based upon assessment information and present levels, develop student-centered measurable postsecondary goals.



- Course of Study: Determine course of study that will support the student’s transition goals.
- Coordinated Set of Activities to Support Transition Goals: Develop a “coordinated set of activities” that support the measurable postsecondary goals and transition plan.
- Transition Services: Determine transition services and document in student’s IEP.
- Student Led Transition (IEP) Meeting: Assist the student to plan and prepare to lead the IEP meeting. Be sure to include these additional components:
  - Age of Majority: Document the information shared with the student around the Age of Majority. Please see section of this Procedural Guide entitled, “Age of Majority” for more details on this topic.
  - Invite Appropriate Outside Agencies: Ensure appropriate agencies are invited to the IEP meeting.
- Implementation: Implement the IEP, monitor progress on goals and course of study, modify and update plan annually.
- Annual Review of Goals and Updates to Plan: Develop annual IEP goals that align with and support the transition plan and postsecondary goals.
- Summary of Performance: The Summary of Performance must be completed in the final year of a student’s high school education. It is intended for postsecondary schools, service providers, and employers, to be used at the student’s discretion.

## Transition Assessment

Transition Assessment is the ongoing process of collecting data on the individual’s needs, preferences and interests as they relate to the demands of current and future working, educational, living, and personal and social environments. Assessment is the common thread in the transition process and forms the basis for defining goals and services to be included in the IEP. Transition assessment should include activities, assessments, content, environments, instruction, and/or materials that reflect a student’s chronological age.

Each year, the transition assessments should be revisited in a more specific manner, targeting the student’s development. For students in grades nine and ten, a career exploration measure or interest inventory is typically satisfactory. For an older student, a vocational skills assessment is more appropriate. Assessment should address all three components of transition- employment, postsecondary education and training, and independent living.

It is best practice to use information in addition to a student’s self-report when assessing for transition. Input from parents, teachers, and other providers is helpful in determining needs a student may have but not recognize themselves in employment, independent living, and education.

Tools that can be used to assess a student’s transition needs may include:

- Psycho-educational Assessments
- Job Evaluations
- Labor market Surveys\Aptitudes Tests
- Progress on IEP Goals
- Transition Inventories
- Observations & Record Reviews
- Interest Surveys
- Personality Inventories
- Academic Assessments/ Curriculum Based Assessments
- Computerized Career Systems



- Student and family interviews

If doing individual transition assessment, there should be an assessment plan signed by the parent or guardian. Some assessments are often done as a group activity, and may not require an assessment plan. For example, if a whole class is taking an online career interest inventory, individual parent consent is not required. But, if an individual student is asked to complete a career interest inventory and the assignment is not required class wide, an assessment plan must be signed for parent consent.

Document the assessment(s) done each year in the transition assessment section of the IEP. Include the name and date of each tool used, a brief summary of the results, and outcomes of any work, training or community service in which the student has participated.

### **Measurable Postsecondary Goals**

Measurable Postsecondary Goals (MPSGs) should be student centered and directed by assessment. They typically focus on 12-24 months after high school graduation or completion. It's important that the goals are measurable and identify an outcome rather than a process. These measurable postsecondary goals must be reviewed and updated annually, but they may not change annually. They may become more specific as a student matures.

Measurable postsecondary goals are required for all students in two areas: 1) training/education and, 2) employment. Measurable postsecondary goals in the area of training/education may include college studies (university and community college), occupational certification, technical training, industry certification, or on the job training. Measurable postsecondary goals in the area of employment might include paid, competitive, supported or sheltered employment. It may also include unpaid opportunities such as volunteering in a training capacity, military, etc.

A third measurable postsecondary goal in the area of Independent Living is recommended but not required. It is up to the student's IEP Team to determine whether IEP goals related to the development of independent living skills are appropriate and necessary for the student to receive FAPE (71 Fed. Reg. 46668 (Aug. 14, 2006)). Measurable postsecondary goals in the area of independent living should be considered for students who are Regional Center clients, students taking alternative assessments, students on a non-diploma track, and for students with medical and mental health issues.

Recommended best practice is to have a goal in independent living for all students with an IEP.

### **Suggested IEP Language for Measurable Postsecondary Goals**

The IEP template in SEIS starts the MPSG with "Upon completion of school I will..." From that point on, you could choose to add specificity, i.e. "receive a certificate of completion and..." or "receive a high school diploma and..." and align MPSGs with the outcome identified in the student's Course of Study.

Use results-oriented terms such as, "Will enroll in, will work at, will live independently," etc. (Avoid "hope to," or "plan to," or "will seek employment," etc.). Use descriptors such as full-time, part-time, independently, with adult support, etc.

Annual goals should be specifically and directly linked to the measurable postsecondary goals. Annual goals must be reasonably calculated to assist the student in achieving readiness for postsecondary goals. Skills targeted should be based on identified areas of student need, and there should be at least one annual goal tied to each measurable postsecondary goal.



## Course of Study

Federal and state law require that transition pages in an IEP include a multi-year description of coursework planned to achieve the student's desired postsecondary goals from the student's current year to the anticipated graduation or exit year. A transcript does not meet this requirement unless it includes courses the student will take in the future, by year, that are specifically related to the student's postsecondary goals. List any courses that are LEA/ district, student, or site specific and how they link to measurable postsecondary goals.

Based on a review of legislation and California Education Code (CEC) that inform the course of study for the state of California, and with the goal of making sure we do not create liabilities for any students, the California Secondary Transition Leadership Team has recommended:

- The course of study must intentionally and explicitly reflect each student's secondary completion goals and postsecondary transition goals.
- For students who plan to earn a high school diploma the student must meet state and district graduation requirements.
- Elective classes or those meeting the state and district graduation requirements such as performing and visual arts, foreign language (language other than English including American Sign Language), and career technical classes should reflect the individual student's career interests and postsecondary goals.
- The course of study should be sufficiently generic to be portable across district or state lines.
- Student progress toward achieving a high school diploma or certificate of completion should be monitored at least once annually with consideration given to attendance, grades, credit status and other educational performance measures. The course of study should also be reviewed at least once annually for all students.
- It should be recognized that, to the maximum extent possible, attainment of a high school diploma should be recognized as partially meeting postsecondary education and employment goals. (Some employers require a diploma to meet their minimum requirement when considering job applicants).
- It should be emphasized that the course of study and attainment of a diploma or certificate are not sufficient to document the provision of transition services as mandated in IDEA.
- For students whose course of study will lead to certificates that are alternatives to a high school diploma, the certificate should intentionally and explicitly reflect each student's secondary completion goals and postsecondary goals.

Compiled by Sue Sawyer, California Transition Alliance, 2015, *Secondary Transition Planning: The Basics*

Note: The certificate of completion option is available to those students who are not able to complete the requirements for a regular high school diploma as offered by the LEA/district. These students are eligible for educational placement and services in accordance with their IEP until the age of 22. If the school is a charter school, the governing board of the LEA/district approves the requirements for the certificate of completion graduation option. In a standard public school, the



certificate of completion option is in accordance with EC 56390.

### **Coordinated Set of Activities to Support Transition Goals**

IDEA requires a “coordinated set of activities” for individual students to meet their postsecondary goals. These activities should be listed in the transition pages of the student’s IEP, and must be individualized based on the needs of the student. While some activities included in the list may be general activities offered to all students at a school site, other activities should be identified that help each individual student work toward their measurable postsecondary goals.

Many of these activities may already be happening at a school site and may benefit all students. Examples might include:

- Career Day for all students
- Visits to local community college(s)
- Visit local recreation centers
- Taking public transportation to community activities
- Community Service
- Job shadow other peers

Activities to support a student’s transition goals may be provided by a variety of properly qualified personnel, depending on the needs of the student. Some examples might include:

- A school counselor provides information on college admissions, financial aid or campus information
- An occupational therapist provides fine motor therapy for a student to be able to brush her hair on her own
- A special education teacher provides specialized academic instruction to improve math skills in the area banking and money management
- A case manager arranges for job shadowing opportunities in the community
- A “careers class” provides instruction in job search and interviewing skills

### **Transition Service Codes**

Many service codes for transition services are 800 codes in SEIS/CASEMIS. Students who struggle with activities of daily living may need direct instruction in areas such as hygiene, cooking, budgeting, etc. In some cases “specialized academic instruction (code 330)” may be the appropriate service to support a measurable postsecondary goal in independent living, even though it is not an 800 code.

800 CASEMIS Codes available in SEIS are as follows:



820	College Awareness	
830	Vocational assessment, counseling, guidance, and career assessment	Organized educational programs that are directly related to the preparation of individuals for paid or unpaid employment and may include provision for work experience, job coaching, development and/or placement, and situational assessment. This includes career counseling to assist student in assessing his/her aptitudes, abilities, and interests in order to make realistic career decisions.
840	Career awareness	Transition services include a provision for in self-advocacy, career planning, and career guidance.
850	Work experience education	Work experience education means organized educational programs that are directly related to the preparation of individuals for paid or unpaid employment, or for additional preparation for a career requiring other than a baccalaureate or advanced degree.
855	Job Coaching	Job coaching is a service that provides assistance and guidance to an employee who may be experiencing difficulty with one or more aspects of the daily job tasks and functions. The service is provided by a job coach who is highly successful, skilled and trained on the job that can determine how the employee that is experiencing difficulty learns best and formulate a training plan to improve job performance.
860	Mentoring	Mentoring is a sustained coaching relationship between a student and teacher through on-going involvement and offers support, guidance, encouragement and assistance as the learner encounters challenges with respect to a particular area such as acquisition of job skills. Mentoring can be either formal as in planned, structured instruction or informal that occurs naturally through friendship, counseling and collegiality in a casual, unplanned way.
865	Agency linkages (referral and placement)	Service coordination and case management that facilitates the linkage of individualized education programs.
870	Travel Training (includes mobility training)	
890	Other transition services	These services may include program coordination, case management and meetings, and crafting linkages between schools and between schools and post-secondary agencies. (Note: This code should be used with caution and only when appropriate)
900	Other Special Education/Related Services	Any other specialized service required for a student with a disability to receive educational benefit.

### Summary of Performance (Postsecondary Exit)

The Summary of Performance (SOP) is required under the reauthorization of the Individuals with Disabilities Education Act of 2004. The language as stated in IDEA 2004 regarding the SOP is as follows:

For a student whose eligibility under special education terminates due to graduation with a regular diploma or due to exceeding the age of eligibility, the local education agency “shall provide the student with a summary of the student’s academic achievement and functional performance, which shall include recommendations on how to assist the student in meeting the student’s postsecondary goals.”

§Sec. 300.305(e)(3).

The Summary of Performance, with the accompanying documentation, is important to assist the student in the transition from high school to higher education, training, and/or employment. This information is necessary under Section 504 of the Rehabilitation Act and the Americans with Disabilities Act to help establish a student’s eligibility for reasonable accommodations and supports in postsecondary settings. The information about students’ current level of functioning is intended to help postsecondary institutions consider accommodations for access. These



recommendations should not imply that any individual who qualified for special education in high school will automatically qualify for services in the postsecondary education or the employment setting. Postsecondary settings will continue to make eligibility decisions on a case-by-case basis (adapted from the Council for Educational Diagnostic Services, a division of the Council for Exceptional Children).

The Summary of Performance must be completed in the final year of a student's high school education. It is intended for postsecondary schools, service providers, and employers, to be used at the student's discretion. The different organizations may have their own standards regarding the documentation required to establish eligibility. Students may (but are not required to) share their Summary of Performance with colleges, adult agencies, vocational and rehabilitative centers, employers and others.

The SOP helps such organizations identify services and accommodations the student might need in the classroom, the workplace, or the community.

Each Summary of Performance must include information about the student's academic achievement, information about the student's functional performance, and recommendations on how to assist the student in meeting his/her postsecondary goals. IDEA does not identify a specific individual responsible for preparing the Summary of Performance. Typically, a student's special education teacher completes the SOP when a student exits high school.

There is no mandate in IDEA that requires a meeting to be held to discuss a Summary of Performance, and if a meeting is held, membership at the meeting is not prescribed. Typically, there can be a meeting with the case manager, student, and parent. If an exit IEP is being held, an SOP discussion could naturally occur during this meeting.

### **Performance Indicator**

The Individuals with Disabilities Education Act (IDEA) was reauthorized on December 3, 2004, becoming effective on July 1, 2005. In conjunction with the reauthorization, the U. S. Department of Education required states to develop six-year State Performance Plans around 20 indicators, on which data is submitted annually in Annual Performance Reports.

The 13th Performance Indicator relates to transition services for students, and includes eight specific components to determine compliance around transition mandates:

“Percent of youth with IEPs aged 16 and above with an IEP that includes appropriate (1) measurable postsecondary goals, (2) that are annually updated and based upon an age appropriate (3) transition assessment and (4) transition services, including (5) courses of study, that will reasonably enable the student to meet those postsecondary goals and (6) annual IEP goals related to the student's transition services' needs. There also must be evidence that the (7) student was invited to the IEP team meeting where transition services are to be discussed and evidence that, if appropriate, a representative of any (8) participating agency was invited to the IEP team meeting with the prior consent of the parent or student who has reached the age of majority (20 U.S.C. 1416(a)(3)(B)).”

There are eight questions that must be answered in the Transition Plan of a student's IEP to satisfy Indicator 13:

- Are there appropriate measurable postsecondary goals (MPSGs) that address education/training, employment, and as needed, independent living?
- Are the MPSGs updated annually?
- Is there evidence that MPSGs were based upon assessment?
- Are there transition services in the IEP that will *reasonably enable* the student to meet





- the MPSGs?
- Will the course of study (in the transition services) *reasonably enable* the student to meet the MPSGs?
- Are there annual IEP goals related to the transition needs of the student?
- Is there evidence the student was invited to the IEP?
- Is there evidence of an invitation to the IEP extended to representative of involved agency (as appropriate)?  
An IEP may be considered compliant in meeting the requirements of Indicator 13 if it includes evidence of the eight (8) required components stated above.

## Student Participation in the IEP

IDEA requires the student be invited to the IEP meeting whenever appropriate. The IEP is based on the individual student's needs, strengths, preferences and interests. When planning for the transition from high school to post-school life, the student's input is essential for his or her success. In accordance with 34 CFR 300.321(a)(7), the public agency must invite a student with a disability to attend the student's IEP Team meeting if a purpose of the meeting will be the consideration of the postsecondary goals for the student and the transition services needed to assist the student in reaching those goals under 34 CFR 300.320(b).

There are four areas where a student can be involved in the IEP process:

- Planning the IEP: includes laying the foundation for the meeting by identifying strengths and needs, establishing goals, considering options, and preparing materials for the IEP meeting.
- Drafting the IEP: provides practice in self-advocacy skills and includes having students create a draft of their IEP that reflects these strengths and needs, as well as their interests and preferences.
- Participating in the IEP meeting: in which students have the opportunity to share their interests, preferences, and needs and participate in dialogue with other members of the IEP team to develop a plan.
- Implementing the IEP: involves students evaluating how well they are achieving the goals identified in their IEP.

Konrad, M., & Test, D. W. (2004). Teaching middle-school students with disabilities to use an IEP template. *Career Development for Exceptional Individuals*, 27, 101-124.

Suggested Self-Advocacy strategies to prepare students to participate actively in the IEP:

- Inventory strengths: areas to improve or learn, goals and choices for learning or needed accommodations. Students complete an inventory sheet they can use at the IEP meetings.
- Provide inventory information: Use inventory, portfolio, presentation video, etc.
- Listen and respond: learn the proper times to listen and to respond.
- Ask questions: teach students to ask questions when they don't understand something.
- State goals: students list the goals they would like to see in their IEP.
- Use the IEP as an opportunity to develop self-advocacy and leadership skills.

Compiled by Sue Sawyer, California Transition Alliance, 2015, *Secondary Transition Planning: The Basics*

Below you will find a Student-Led IEP Script and Transition (IEP) Meeting Agenda.





**SAMPLE STUDENT-LED IEP MEETING SCRIPT**

Hello everyone. Welcome to my IEP meeting. I am \_\_\_\_\_.

Today we will talk about how I am doing in school right now, the progress I've made on my special education goals, my goals for the future, and what type of help I will need to reach my goals.

I will be leading this meeting, so please be sure to address me directly with all of your comments. Will everyone please introduce yourselves? Starting with... Thank you.

Here is a copy of your parent rights (hand to parent). When I turn 18, I will be legally responsible for myself (Team may discuss transfer of rights).

My strengths and interests are.....

The reason I have a right to special education services is because I.....which makes it hard for me to

.....

I am interested in working as a .....

Would anyone like to add to what I have already shared?

After high school I want to ..... (Student shares Measureable Post-Secondary Goals)

My concerns about school are.... ..

What are your concerns, Mom or Dad?

Here is how I am doing in school right now:

State testing	Credits I need to earn
Current grades	Attendance
Progress on last year's IEP goals	Work samples

Student asks Team Members (specialists) to share reports in other areas (health, social, motor, vocational, living skills).

This year I want to ..... (Student or teacher shares Annual Goals for this IEP)

The kind of help I will need is.....

The services I need are.....

- Support in.....
- Special attention on.....
- Work with.....

Are there any other questions or things we need to cover?

Will everyone please sign the attendance page?

Thanks for coming, everyone.



## Suggested Transition Individualized Education Plan Agenda (with Annual IEP)

- **Welcome**
  - Introductions
  - Purpose of Meeting/Expected Outcomes
  - Agenda Overview
  - Review Child/Parent Rights
  
- **Present Levels of Performance**
  - Parent Concerns
  - Review of Reports (General Education, Related Service Providers, other agencies, if applicable)
  - Review of Progress on Current Goals/Objectives
  
- **Transition Plan (for Students 16 Years and Older)**
  - Discuss Student Strengths/Preferences/Interests
  - Review Results from Transition Assessments
  - Develop/Review Measurable Postsecondary Goals
  - Discuss Activities and Services to Support Postsecondary Goals
  - Document Course of Study
  - Discuss Age of Majority
  
- **New Goals/Objectives**
  - Based on Current Need Areas
  - Aligned with Postsecondary Goals
  - Based on Student's Plan for the Future
  
- **Special Factors**
  - Assistive Technology requirements, if needed
  - Low Incidence Requirements, if needed
  - Blindness or Visual Impairment, or Deaf or Hard of Hearing, if appropriate
  - English Learner, if appropriate
  - Behavior Supports, if needed
  - Areas of Need Identified
  - Participation in State/District-wide Assessments
  
- **Offer of Program/Services Based on Goals and Transition Plan**
  - Service Delivery Options (LRE)
  - Supplementary Aids, Services and Other Supports
  - Accommodations/Modifications
  - Special Education and Related Services
  - Review Transition Services
  
- **Offer of Educational Setting**
  - Percentage of time in/out of general education classes (rationale for time out of general education)
  - Other Agencies Involved
  - Promotion Criteria
  - Progress Monitoring/Progress Reporting
  - Special Education Transportation
  - Graduation Plan
  
- **Closing**
  - Confirm Agreements
  - Gather Signatures

\*At Exit IEP or Graduation IEP, complete the Summary of Performance.

