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# Capacity Building Virtual Institute

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# Secondary Transition Supports and Services for Students with Complex Support Needs

# NTACT 2020 CBVI - Team Lead and Team Member Timeline

## Phase 1

- Register your team by **May 15, 2020**
- Watch "Things to Know about the CBVI" (https://transitionta.org/cbi/2020)
- Gather your team virtually or by phone to plan team's participation in the CBVI activities (i.e., content presentations, team planning, state to state sharing groups) *This step may occur later;*
- If using a facilitator, look for email from facilitator about team planning times and expectations
- Set up team planning meetings, with team and facilitator

## Phase 2

- Watch the "Kickoff" and four content presentations on the Transition Coalition Website available week of **May 25th, 2020**
- Use the provided note-taking resources from NTACT during and following the content presentations
- Participate in the content presentation discussion board(s) on the Transition Coalition Website
- After viewing content presentations, begin team planning meetings, if appropriate
- View resources for "Moving from Content to State to State Sharing Groups"

## Phase 3

- Use resources posted to help your team "Move from Content to State to State Sharing Groups" (https://transitionta.org/cbi/2020)
- Gather your team virtually or by phone to identify team's selection of **one or two** of the state to state sharing groups to participate in OR discuss in team planning meeting (see State to state sharing groups list at https://transitionta.org/cbi/2020 posted by May 27, 2020).
- Identify context expert requests (up to 2), if desired, with your facilitator or with Jennifer Coyle (jennifer.coyle@wmich.edu)
- Register team for state to state sharing groups at by **June 5, 2020**
- Prepare for state to state sharing groups by referencing your notes and engaging with your team

## Phase 4

- Participate in state to state sharing group selected **(Tentatively scheduled for June 15 – 18, and June 22 – 25, 2020, 1:00 – 2:30 p.m. EDT)**
- After participating in state to state sharing groups, continue team planning meetings, if appropriate
- Identify content expert requests (up to 2), if desired, with facilitator or with Jennifer Coyle (jennifer.coyle@wmich.edu)
- Conduct and finalize team planning

## Phase 5

- Complete Institute evaluation
- Finalize team planning/ share a copy of the action plan with all team members and NTACT (if not using online program tool)
- Receive follow-up support from NTACT or other TA Center staff, regarding indicated TA needs in your state's plan
- Network with other states on common goals, as you desire
- Participate in culminating webinar to share-out state plans in mid August

# Phase 2: Watch Content Presentations

## Timeline: May 25 to June 5, 2020

| State Team Lead | State Team Members |
|---|---|
| ✓ **Watch the "Kickoff" and four content presentations on the Transition Coalition website available week of May 25th, 2020** | ✓ **Watch the "Kickoff" and four content presentations on the Transition Coalition website available week of May 25th, 2020** |
| ✓ **Use the provided note-taking resources from NTACT during and following the content presentations** | ✓ **Use the provided note-taking resources from NTACT during and following the content presentations** |
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# Instructions for viewing & activities for this presentation

- Individual or team viewing
- Materials/resources:
  - Cornell Notetaking Framework
    - Moving from Content to State to State Sharing Groups
  - Levels of Collaboration Scale

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# Notetaking Framework

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## 2020 Capacity Building Virtual Institute: Notetaking Framework

Pre-recorded presentation title: _____

Current state goal: _____

Current state goal: _____

Current state goal: _____

| Considerations for capacity building | Notes |
|---|---|
| • Use of evidence-based practices<br>• Student and family engagement<br>• Systems alignment and cross-agency/department collaboration and coordination<br>• Data-based decision making | |
| 1. What goal or current initiative does this content support? | |
| 2. What questions do you have for your team members? External experts/consultants? What do you want to know more about? | |
| 3. What partners are needed to do the work? Existing or new? | |
| 4. What barriers/challenges and actions need to be addressed to do this work? | |

*Based on Cornell Note Taking Strategy, Walter Pauk, Cornell University.

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# Intended Audience

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# Today's Presenters

**Linda O'Neal,** San Diego State University

**Michael Stoehr,** NTACT

**Charlie Walters,** University of South Carolina

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# Purpose & Outcomes

This CBVI content session is intended to provide interdisciplinary teams with an opportunity to:

- support strategic action planning for the 2020-21 school year highlighting goals/activities that specifically target students with complex support needs;
- increase state team members' knowledge of effective resources, practices, and activities that support successful postsecondary outcomes for students with complex support needs; and
- connect with peers from other states

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# Two Big Ideas for Assisting Students with Complex Support Needs

## 1. Providing cross-agency, collaborative service delivery for Competitive Integrated Employment (CIE)

a) Promoting ambitious outcomes for youth with complex support needs cannot happen in a silo

b) Developing a shared vision of outcomes for all youth with disabilities that encompasses specific target populations including youth with complex support needs

c) Developing common goals for framing collective efforts

d) Implementing common mechanisms for tracking collective efforts

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# Two Big Ideas for Assisting Students with Complex Support Needs

## 2. Promoting person centered planning and meaningful transition assessment practices

a) Supporting ambitious outcomes for youth with disabilities demands an individualized, person-centered approach

b) Transition assessment data drive outcomes

# Interagency, Collaborative Service Delivery: Basic Premises

(a) Promoting ambitious outcomes for youth with high intensity support needs cannot happen in a silo

- Identify community/state agencies with a mission & focus on employment preparation for people with disabilities
- How do you access the community partnerships needed to make your CIE goals a reality?
- What will you do to get the agency decision makers involved in the CIE Programming efforts?
- What methods will you use to get the reluctant partners involved in the community supported CIE efforts?

# Interagency, Collaborative Service Delivery: Basic Premises (continued)

(b) Developing a shared vision of outcomes for all youth with disabilities that includes specific target populations like youth with complex support needs

(c) Developing common goals for framing collective efforts

- Organize meetings to discuss needs, create shared vision and determine next steps/action plan
- How will your team adopt a CIE mission that all team members will support and promote?
- What strategies can be used to develop a community approved & adopted CIE Action Plan?
- How will you ensure that partners are invested in the implementation of the CIE Action Plan?
- How will you address programming barriers?

# Interagency, Collaborative Service Delivery: Basic Premises (continued)

(d) Implementing common mechanisms for tracking collective efforts

- Discuss data collection needs, current data collection methods, and determine data sharing across multiple agencies
- What strategies would be helpful to determine data needs?
- What are the barriers to exchange data across multiple agencies?
- How will the barriers be addressed?

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# Levels of Collaboration Scale

Name _____ Date _____

**Levels of Collaboration Scale**

(From Frey, B.B., Lohmeier, J.H., Lee, S.W., & Tollefson, N. (2006). Measuring collaboration among grant partners. *American Journal of Evaluation, 27,* 3, 383-392.)

This form is designed for those who work in one of the organizations or programs that are partners in the _____. Please review these descriptions of different levels of collaboration.

- On the response section at the bottom of the page, please circle the name of the organization or group with which you are associated.
- Using the scale provided, please indicate the extent to which you **currently** interact with each other partner. (Skip your own row.)

| | Five Levels of Collaboration and Their Characteristics | | | | |
|---|---|---|---|---|---|
| | **Networking 1** | **Cooperation 2** | **Coordination 3** | **Coalition 4** | **Collaboration 5** |
| **Relationship Characteristics** | -Aware of organization<br>-Loosely defined roles<br>-Little communication<br>-All decisions are made independently | -Provide information to each other<br>- Somewhat defined roles<br>-Formal communication<br>-All decisions are made independently | -Share information and resources<br>-Defined roles<br>-Frequent communication<br>-Some shared decision making | -Share ideas<br>-Share resources<br>-Frequent and prioritized communication<br>-All members have a vote in decision making | -Members belong to one system<br>-Frequent communication is characterized by mutual trust<br>-Consensus is reached on all decisions |

| Partners | No Interaction at All | Networking | Cooperation | Coordination | Coalition | Collaboration |
|---|---|---|---|---|---|---|
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
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| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |
| | 0 | 1 | 2 | 3 | 4 | 5 |

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# Notetaking Framework

Teaming & Meeting

Educating Each Other & Cross Partner PD

Answering Shared Questions & Using Feedback Loops

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2020 Capacity Building Virtual Institute: Notetaking Framework

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Current state goal: _____

Current state goal: _____

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*Based on Cornell Note Taking Strategy, Walter Pauk, Cornell University.

Using IAA/MOU

Developing shared goals

Analyzing Policies, Procedures, & Practices

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# Interagency, Collaborative Service Delivery: Some Critical Topics

- State resource mapping and interagency flow of services
- Interagency agreements and other policy-related mandates
- Supporting a meaningful day
- Supported Decision-Making
- Benefits planning and Medicaid waiver services

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# State Resource Mapping and Interagency Flow of Services

| Main Ideas |
| --- |
| Generally for better understanding capacity (SRM) or towards a specific goal (FofS)<br>Identifying who is providing what, where, when, and for whom |
| **Guiding Questions** |
| Is everyone clear about what/where/when/for whom employment services are provided?<br>Are we setting goals that build on the strengths of these services and gaps in their delivery?<br>Does everyone have a clear role towards supporting CIE for youth with complex support needs? Do we have common evaluative tools for measuring our progress? |
| **Examples and Resources** |
| NTACT's Resource Mapping and Flow of Services<br>Orange County Local Partnership Agreement Resources |

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# Interagency Agreements and Other Policy-Related Mandates

| Main Ideas |
| --- |
| Collaborative agreements within states are federally mandated (e.g. VR and ED)<br>There may be existing agreements that help or hinder collaboration<br>These agreements can help capture and affirm new efforts towards CIE |
| **Guiding Questions** |
| What collaborative agreements currently exist at the state level? Local level?<br>What do they contain? Do they need to be edited to affirm new efforts?<br>Do we need additional collaborative agreements for other partners? |
| **Examples and Resources** |
| NTACT/WINTAC Interagency Agreement Toolkit for VR and ED |

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# Supporting a Meaningful Day

## Main Ideas

Meaningful Day means individualized access for persons with disabilities to support their participation in activities and functions of community life that are driven by the individual and are desired and chosen by the general population.

## Guiding Questions

Are the secondary transition activities and services for individuals with disabilities in our state:
Meaningful, Purposeful, Outcome-oriented
Person-driven and individualized
Utilizing braided, wrap around supports
Incorporating integrated, flexible and responsive service plans
Employment-focused
Are data driven
Build connections to community
Incorporate supports that are expected to fade (to some degree)

## Examples and Resources

Maryland - DDA - Meaningful Day FAQ
Ohio - Employment First - Meaningful Day Webinar Series

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# Supported Decision-Making

| Main Ideas |
| --- |
| A declaration of incapacity and the appointment of a surrogate decision maker through guardianship or conservatorship is too common for youth with complex support needs<br>Overbroad/undue guardianship will impede the movement and growth of youth<br>How will state/local efforts towards CIE address social pressure valuing safety over independence? |
| **Guiding Questions** |
| How are IEP teams having purposeful, structured age of majority conversations that maximize support and limit families pursuing undue or overbroad guardianship/conservatorship? |
| **Examples and Resources** |
| National Resource Center for SDM and Washington D.C. Schools<br>SC's Stop, Look, and, Listen Tool and Other Resources |

# Benefits Planning and Medicaid Waiver Services

| Main Ideas |
| --- |
| Benefits planning for social security beneficiaries and getting youth referred to systems that may have longer wait times like Medicaid Waiver-based services offered after high school may be critical steps along the way to CIE |
| **Guiding Questions** |
| How do youth Social Security beneficiaries currently access benefits planning?<br>How are youth identified, supported, and tracked on their way to accessing Medicaid Waiver services that won't begin until after high school? |
| **Examples and Resources** |
| National Disability Institute - Benefits Planning<br><br>SSA Benefits Counseling |

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# Person Centered Planning and Meaningful Transition Assessment: Basic Premises

a) Supporting ambitious outcomes for youth with disabilities demands an individualized, person-centered approach

b) Considerations regarding Important To and Important For

c) Transition assessment data drives outcomes for planning, setting goals and achieving post-secondary success

# Important To and Important For

- Although supports and needs may change across the lifespan, pursuit and enjoyment of **what is important to the person** remains the guiding force.
- Real person-centered planning provides an opportunity to guide people through a process of discovery to learn what is most important to them, and then partner to create a plan that supports a clear trajectory toward their personally defined "good life."
- Important TO: Elements of life that are valued by the person and contribute to their happiness and/or contentment.
- Important FOR: Needs that should be addressed to support a person's health and safety.

MARYLAND Department of Health

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# Meaningful Transition Assessment Considerations

- Procedures for assessment
- Purpose of assessment
- What to assess
- How to effectively utilize Person Centered Planning
- Finding Transition Assessments resources

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# When considering your procedures for assessment the following components need to be addressed:

- Determining what to assess
- Determining stakeholders
- Selecting appropriate assessments
- Conducting assessments
- Reviewing assessment results
- Using assessment data

## What are your areas of strength and need?

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# When assessing youth and young adults, continually pose these questions:

- Whose needs are being met?
- What did the student/family and you learn from the assessment *process*?
- Where do you record the information – how is it interpreted?
- What do we do with the information – how is it utilized?

## How are these considerations being addressed?

# What to Assess: Skills & Supports

| | |
|---|---|
| General Transition Areas/Skills | Functional Life Skills & Functional Academics |
| Career Interests, Awareness, Skills | Physical/Mobility |
| Preferences & Interests | Assistive Technology |
| Sensory Needs | Leisure & Social Skills |
| Communication | Medical & Health |
| Self-Determination | Special Skills/Interests |

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**How are these areas being addressed?**

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# Person Centered Planning (PCP)

PCP is a natural outgrowth of everything we know about the importance of self-determination, individualization, interagency collaboration, and the like

PCP can be the intersection of the IEP, IPE, self-directed Medicaid Waiver services, and more

**Are students accessing PCP?**

**What are the barriers to their access?**

**What's being lost in terms of PCP information from high school to adult services?**

**What could be better shared or gathered collectively?**

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# Transition Assessments Resources

- Indiana University - Transition Assessment Matrix
- Transition Coalition Assessment Reviews and Learning Module
- NTACT Age Appropriate Transition Assessment Toolkit
- Assistive Technology Protocol for Transition Planning
- Transition Assessment for Students with Significant Disabilities

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# Transition Assessments Resources

- Personal Preference Indicators: A Guide for Planning
- Life Course Framework
- Person Centered Planning
- Employment Support Indicators
- I'm Determined.org

# Phase 2: Watch Content Presentations

## Timeline: May 25 to June 5, 2020

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|---|---|
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# Notetaking Framework

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| Unanswered questions and A-ha's: | Notes |
|---|---|
| | |
| | |
| | |

**Summary:**

**Moving from content to state-to-state sharing groups**

After viewing and interacting with the content for this presentation, reflect on your notes (and conversations with your team during team planning times), to determine areas of focus for: (1) additional team planning times; (2) focused state-to-state discussion opportunities; (3) planning for professional development and technical assistance with LEAs; (4) evaluation efforts and program development for LEAs; and (5) state-to-local capacity building.

- ...
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# Phase 3: Preparing for State to State Sharing Groups
## Timeline: May 25 to June 12, 2020

| State Team Lead | State Team Members |
|---|---|
| ✓ Look at and follow resource "Moving from Content to State to State Sharing Groups" (https://transitionta.org/cbi/2020) | ✓ Help team leader with "Moving from Content to State to State Sharing Groups" (https://transitionta.org/cbi/2020) |
| ✓ Gather your team virtually or by phone to identify team's selection of one or two of the state sharing groups to participate in OR discuss in team planning meeting (see State to state sharing groups list at https://transitionta.org/cbi/2020) | ✓ Attend virtual or phone team meeting, or team planning meeting(s) |
| ✓ Register team for State sharing groups at by June 5, 2020 | |
| ✓ Prepare for state to state sharing groups by referencing your notes and engaging with your team | ✓ Prepare for state to state sharing groups by referencing your notes and engaging with your team |

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# Save the Date

- Thursday, June 18 – 1:00 – 2:30 PM Eastern - State-to-State - discussion group (Assessment/Person-Centered Planning for Student with Complex Support Needs)

- Thursday, June 25 – 1:00 -2:30 PM Eastern - State-to-State - discussion group (Collaborative Service Delivery for Competitive Integrated Employment for Students with Complex Support Needs)

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# Contact information

Linda O'Neal, San Diego State University
Linda_oneal@interwork.sdsu.edu

Michael Stoehr, NTACT
mstoehr@uncc.edu

Charlie Walters, University of South Carolina
walterc5@email.sc.edu

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- **…and on Pinterest:** at transitionta
- **…and on Teachers Pay Teachers**
- **Contact us:** ntactmail@uncc.edu

# THANK YOU

## for your participation!