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PERSON-CENTERED PLANNING MANUAL

Introduction

Person-centered planning (PCP) can be defined as "a family of approaches to organizing and guiding community change in alliance with people with disabilities, their families, and friends" (O'Brien, 1993). Person-Centered planning is important because it increases student and family participation in meetings, especially IEP meetings. PCP meetings help them to understand the process and give them a voice. It is also important because it increases student self-determination and self-advocacy (Furney, 1993). In this manual we will discuss eight important steps of a Person-Centered Planning meeting. Using this step-by-step approach will provide you with a structured and an effective way to not only facilitate a PCP meeting, but to also meet all IDEA transition planning requirements.

Transition and the IEP

The reauthorization of IDEA in 2004 requires these essential aspects to the transition IEP:

- 1. Transition planning should start no later than the first IEP to be in effect when the child is 16 years old, but can begin sooner. Many states start transition planning at the age of 14 (Morningstar, 2018).
- 2. Transition planning members include the student, the parents, at least one general education teacher, a special education teacher, a district representative, someone to interpret evaluation results, and others that the family and student would like to invite (Morningstar, 2018).
- 3. The transition IEP must include appropriate measurable postsecondary goals.
- 4. The post secondary goals must be updated annually (Transition Planning).
- 5. Measurable postsecondary goals should be based on age appropriate transition assessments (Transition Planning).
- 6. It must include transition services in the IEP that will reasonably enable the student to meet his or her postsecondary goals (Transition Planning).
- 7. Transition services include courses of study that will reasonably enable the student to meet his or her postsecondary goals (Transition Planning).
- 8. The annual IEP goal(s) must relate to the student's transition services needs (Transition Planning).
- 9. The student must be invited to the IEP team meeting where transition services were discussed (Transition Planning).
- 10. If appropriate, a representative of any participating agency should be invited to the IEP team meeting with the prior consent of the parent or student who has reached the age of

- Majority (Transition Planning).
- 11. Transfer of educational rights at the age of majority- one year prior to the student's 18th birthday (the age of majority for most states), the school must notify both the student and the parents that the rights under IDEA will transfer from the parent to the student when the student turns 18. The following legal rights transfer from the parents to the student (Morningstar, 2018):
 - a. Notification of meetings
 - b. Notification and consent for evaluation
 - c. Selection of participants in IEP meetings
 - d. Approval of the contents of the IEP
 - e. Approval regarding change of placement
- 12. Provide a summary of performance when a student exits high school- schools are required to provide current and relevant information about the students academic achievement and functional performance. They also should include recommendations for ongoing supports and accommodations in postsecondary settings (Morningstar, 2018).

Identifying and Involving the Student in Their Meeting

A PCP meeting can be beneficial for any student. A student, teacher, or family may be stuck and not know a productive way to proceed with the student's education, social life, career aspirations, or many other aspects of their adult life. If any of these are an issue, this would be the right time to facilitate a PCP meeting. Supporting the student who will benefit from a PCP meeting is a team effort. Make sure all the stakeholders have a say and will contribute positively in the meeting. First and foremost, it is important to involve the student in their own PCP meeting. The student can start by selecting and inviting team members and introducing them at their meeting. You can support the student to complete this process, based on their support needs, some will be able to do this independently, others will need more creative supports. Another way students participate is to make and share a one-pager about themselves, including their preferences, interests, and support needs. During the IEP meeting, when facilitating the process, consider asking the student for their input first, and then the family. After this you can turn it over to others. As students gain more experience and skills they can start to facilitate their own meetings (Morningstar, 2018).

Creating a One-pager with the Students

A one-pager is a fairly simple process that can help to guide the student to self discovery, self-advocacy, and self-determination. There is not one way to create a one-pager. The best way to create the one-pager is to interview the student on their preferences. Some students may prefer to express themselves with a variety of pictures and artwork. Others may be more apt to creating one using a computer program. Whatever the medium is for their work, it needs to be their work. Educators, parents, friends, and classmates can and should lend a helping hand where needed,

but the overall product should be mainly from the students. Components of the one-pager usually contain the following, but these headings can be adjusted to fit the student.

- ☐ About Me. List accomplishments, family members, friends, likes, etc.
- ☐ Strengths/Attributes. What are their strengths in school, home, community, etc.
- ☐ *Vision and Goals*. What they want to accomplish in the future.
- ☐ What Works/What Doesn't. List the ways to help the student, and things that make life hard or discouraging.
- * Example of a One-pager Credit: FACTOregon.org



PCP Process and How to Conduct the Meeting

The meeting will follow an 8-step mapping plan. The recommendation is to have a facilitator and a note taker who work simultaneously to gather the information for each map. The facilitator and/or note taker create the map templates using poster paper. Each map template is placed on the wall of the meeting area in order as applicable. To start the meeting, that facilitator creates an agreement page or a set of "rules" to follow. This should be done in a respectful manner and include guiding phrases such as; everyone's voice will be heard, keep all comments positive, keep all comments on topic. Post the agreement page so it is visible to all. Once the agreement page is complete, it is suggested to put a page up with the student's name in the middle of the page and have everyone put a positive word or phrase that relates to the student. This is optional, but is a positive way to start the meeting. Once the meeting starts the facilitator guides the meeting by asking open-ended questions about the student as they pertain to each map template. As the meeting progresses, the facilitator keeps the meeting moving while the note taker fills in each map template until the planning meeting group is satisfied with the results. The results are then applied to each quadrant of the student's plan in the eighth step - Steps to Get There "We Will" portion of the meeting. From there, specific persons are delegated

responsibilities to make sure the plan is followed so the IEP and transition meeting to follow are done with meaning and fidelity. The Quadrants section is drawn up on a blank sheet of poster paper with each quadrant having a title. In each quadrant the facilitator guides the meeting participant into placing items from the maps into each quadrant. Not all of the information from the maps will be placed on the quadrants section. It is recommended to follow up the meeting by recreating the templates in a slide show presentation for the student and attendees to have. This can be emailed to all the participants, if applicable, using a slide show software such as Google Slides, Microsoft PowerPoint, Prezi.com, etc.

Mapping Titles

- 1. History & Experience "I have done"
- 2. Strengths, Gifts, Capacities "I can"
- 3. Preferences & Interests "Things I enjoy"
- 4. Community Presence "Where I go"
- 5. Possible Futures "I want"
- 6. Essentials for Success: What Works/Doesn't Work "I need"
 - a. Barriers to success
- 7. IEP Considerations "What I need to work on at school"
- 8. Steps to Get There "We will"
 - a. Quadrants:
 - i. Community participation
 - ii. Post-secondary education/Vocational training
 - iii. Employment opportunities
 - iv. Independent living

Moving from PCP to Transition Planning - Collaboration

A Person-Centered Planning meeting should be followed up with the development of an IEP and transition plan. In order to do this the team needs to look at the information gathered from the PCP meeting and clarify goals and objectives for the student. Organizing this information can be challenging, but it helps to organize the information into four quadrants. The Quadrants include: community participation, post-secondary education/vocational training, independent living, and employment. By taking some poster paper and physically organizing the notes from the PCP meeting, team members can help define all the information into goals and objectives for the student. When plugging in information to the quadrants, the facilitator will lead the meeting and focus on one quadrant at a time. The team will look at the input from the PCP meeting and decide if any information is related to that output area. For each quadrant, organize the information in the form of aspirations for the present and for the future. Then look at the input gathered at the PCP meeting and determine which activities will help the student in the most productive way. IDEA mandates that some activities need to provide instruction, while others need to involve community experiences (Furney, 1993).

After all the quadrants are filled in and the team has some ideas about what goals would benefit the student, the facilitator will lead the team in clarifying and revising these goals. Team members should check to make sure the requirements of IDEA were met during the meeting (Furney, 1993):

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The student participated during the development of IEP and transition plan.
The goals are based on the student's preferences, interests, and needs.
The goals are measurable.
The required team members were present during the planning: the student (if
appropriate), the parents, at least one general education teacher, a special education
teacher, a district representative, someone to interpret evaluation results, other agencies
that might be providing or paying for transition services, and others that the family would
like to invite.
The activities in the IEP/transition plan include: instruction, community experiences, and
the development of employment and other post-school living objectives.

After determining that all of the IDEA requirements were met, the team can add the goals to the IEP and transition plan. Goal statements from the quadrant should be added as annual goals to the IEP. If one of the goal statements in the quadrant will take longer than a year, break down the goal into objects and focus on one of the objectives for that year (Furney, 1993). When writing goals, the team needs to add the current academic and functional performance of the student to the IEP and transition plan. IDEA mandates that schools are required to provide current and relevant information about the students academic achievement and functional performance. They also should include recommendations for ongoing supports and accommodations in postsecondary settings. (Morningstar, 2018)

Follow-up Meeting for PCP

The team should plan to meet and look at the progress that the student is making and make sure the persons involved in the meeting are meeting timelines. During this meeting it is important to review the students goals from the previous year and look at the progress they are making towards them. It's also important to check-in with the student and determine if they still have the same preferences, interests, strengths, and needs. Sometimes they change and goals should be altered to reflect that. Then discuss what barriers the student might be facing that is keeping them from making progress on these goals and address ways to move past these barriers. This follow up planning meeting should also celebrate the student's successes from the previous year.

Ouick Reference Guide

☐ How to identify a student who would benefit from a PCP.

While all students who are on track for a transition meeting would benefit from a PCP, there are times and conditions when a PCP would benefit the student and their IEP team the most. First, when a student is approaching the age where transition goals are introduced to the IEP. This usually happens when the student is approaching age 16. During the IEP meeting planning phase would be an opportune time to suggest having a PCP prior to the IEP meeting and to plan the PCP as part of the transition meeting preparation. Another time to set up a PCP is when the teacher and/or IEP team is feeling "stuck" with a student and progress towards goals is stagnate. A PCP is a good way to get the student to open up and for the IEP team to brainstorm. This is a good time to access the current IEP goals, and if needed, amend the IEP to change goals that make more sense to the student and IEP team.

☐ Creating a one-pager with the student.

Creating a one-pager with a student is a good introduction to a PCP. A one-pager can be done in multiple ways. There are templates that can be used from the internet, one can be created from scratch with input from the student, family, and educators. Or, a combination of both ideas. The idea of a one-pager is to get information about the student in



a snapshot form. This is a good way for the student to get on to paper who they are. Once a student is comfortable talking about and advocating for their needs and wants, the door will open up for a PCP meeting down the road.

☐ How to decide who should attend the meeting.

Deciding who should attend the meeting is a group effort. Most, if not all, of the IEP participants should attend if possible. The idea of the meeting is to be positive and have all those who help and support the student be there. It is good practice to get the student familiar with all the persons in their life who help them or will help them in the future. The student may want to invite friends and family, that is ok! They may need help understanding why certain people should be there who they may not know that well, but help them or will be helping them in the future. Whoever is invited, should be there because the student, family, and educator want them there for support and input.

☐ Knowing the IEP and IDEA components and laws.

Although a PCP meeting is supplemental to the IEP meeting, it is good practice to keep the understanding that the meeting is designed to help with transition components of the students IEP. Sending out information to the required members of the IEP about the PCP meeting and reminding them about the IDEA components and laws would be best practice.

☐ Keeping the student engaged.

Keeping the student engaged will be tough if the 'grown-ups' are running the meeting. The more control the student has, and the more they are heard, the more engaged they will be. Let the student help set up the meeting by sending out the invitations, help with setting up the map templates, practicing talking in front of a group, to name a few. The more the student is invested in the meeting, the more engaged they will be during the meeting.

☐ How long before the IEP and/or Transition Meeting should the PCP be held?

The more prepared you and the student are for the IEP or Transition Meeting the better. There is no definitive answer to how long, but it would be in the best interests of both the student and educator to have time to process the information from the PCP. The PCP information should help with writing a quality IEP. A good recommendation would be to have the PCP 3-5 weeks prior to the IEP or Transition Meeting.

☐ Facilitation and note taking best practices.

It is best to have a team, one person facilitating and one person writing. The facilitator and note taker need to have all material prepared and ready for the meeting at least a half an hour prior to the start of the PCP. Make sure the area for the meeting is comfortable for the attendees. Have the visuals in place and accessible to all attendees. Set ground rules and make sure all attendees agree to the ground rules. To help with the pace of the meeting, if the person facilitating has experience conducting meetings, they can also help with writing notes on the maps. The facilitator needs to be the pace keeper. They also need to make sure the attendees are staying active and positive. If the facilitator and note taker work well together and keep the meeting on track and moving at a comfortable pace, the meeting will be successful.

☐ Where and when to have the meeting.

The place where the meeting is held needs to be a comfortable space for all. A classroom, conference room, or a community space that has room for the maps and seating for the attendees would be best. Ultimately, the space should be comfortable for the student. The timing of the meeting should try to best accommodate all involved. This may need to happen after school hours. Consider having food and beverages available or allowing food and beverages in the meeting.

☐ How long should the meeting take?

The meeting can go 1.5 - 2 hours. As long as the group is focused on the task and there are not too many sidebar conversations, the meeting should last less than 2 hours. It will be up to the facilitator to keep the meeting moving along at an appropriate pace. The facilitator and the note taker need to work together to keep the group focused. It may be beneficial to time each part of the mapping process to assist. This can be established in the group agreement or ground rules at the beginning of the meeting.

☐ Can the meeting be done on the computer?

It would be in the group's best interest to have the meeting in person. It may be possible to conduct the meeting using computers or have a hybrid meeting where persons who could not attend in person are connected using computer technology. Due to the possible issues computers can have, along with the amount of facilitation needed to run a meeting, having the meeting completely using computers is not advised.

☐ Best practices to ensure delegated tasks are being accomplished

The facilitator and note taker should follow up with the tasks individuals need to accomplish. Setting reminders up, following up with email and phone calls are vital to the success of the meeting. Be sure to acknowledge accountability for each person and make sure they understand their commitment to the process.

☐ Follow up meeting - when, where, and how?

It is highly recommended to have a follow up meeting once most or all of the assigned tasks are completed. The meeting can be with the facilitator, the student and the student's family. This can happen in the classroom, at a location in the community, or at the student's home; if appropriate. The follow up meeting is to make sure tasks are completed and to ensure the student and family that this is not just a paper exercise. If the student is completely invested in the process, then the outcome of the meeting should generate meaningful, timely, measureable, and obtainable future goals.

Conclusion

The purpose of this manual is to guide participants of a person-centered plan (PCP) through the processes that will result in the student having a successful plan in place, with the right persons assisting, to allow the student to have a self-advocated, self-determined transition in their path to an independent adulthood. With the guidance of this manual teachers, families, and other support persons will have the information needed to successfully complete a PCP while adhering to the guidelines of IDEA. We have concluded that with the assistance of this manual that educators, families, and other support persons, can help students find their own pathway to successful transitions leading to a self-determined adulthood.

Appendices

- -Appendix A: One-pager examples
- -Appendix B: MAPs: 8 Steps examples
- -Appendix C: Quadrant examples
- -Appendix D: IEP Preferences, Interests, Needs, Skills (PINS) examples
- -Appendix E: IEP Transition Goals examples

References:

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Appendices

Appendix A: One-pager Example*

DENNIS HS FRESHMAN

- I love the Seahawks and the Ducks
- Athletic I have done 3 triathlons and play golf
- Volunteer at Snow
- I love hard rock!



STRENGTHS/ ATTRIBUTES

- Contributor I like to help
- Sense of humor
- Empathetic, a good friend
- Very physical

I am a learner! Teach me and I will learn!



VISION AND GOALS

- I will graduate with a modified diploma
- I will get a job at my uncle's car shop
- I will have a house and a roommate
- I will keep active

I want a whole life!





WHAT WORKS

- Treat me like I'm 15!
- Peer/group learning
- Breathe through stuttering
- Clear instructions
- Movement breaks

WHAT DOESN'T

- Gluten / Dairy / Soy
- Talking over me
- No sensory breaks
- Low expectations
- Rushing me



Important things to know about me

- . I am smart and have a really great memory
- . I am very active and love to play
- . I need to use a fidget/chevy to help me pay attention
- . I like to help others and I learn by doing
- · I am compassionate and imaginative
- . I like to contribute and having a "job" to do
- . I am VERY determined and persistent
- . I have strong opinions & like to work for a My left ear gets really RED when I'm



What Works for Me

- · Positive Reinforcement-Catch me doing good! Recognizing that I work hard and giving me a smile—this one's the best for me!
- Detailed Schedule—Knowing what comes next and what to expect
- Warning for upcoming transitions
- Knowing how long a challenging activity such as writing or reading will be (time timer!)
- Clear and concise directions—patiently repeat directions and give an extra pause to help me
- Say what I need TO DO, not what not to do
- · Time and patience to get my thoughts out-When I'm stressed I can sound rude even when I don't mean to be.
- Movement breaks to get my wiggles out
- Quiet breaks—A safe comfortable space to go to refocus. This is very important for me after noisy activities such as lunch, recess, group play and assemblies.
- Music helps me calm down and stay on task— I have special music to help with this.



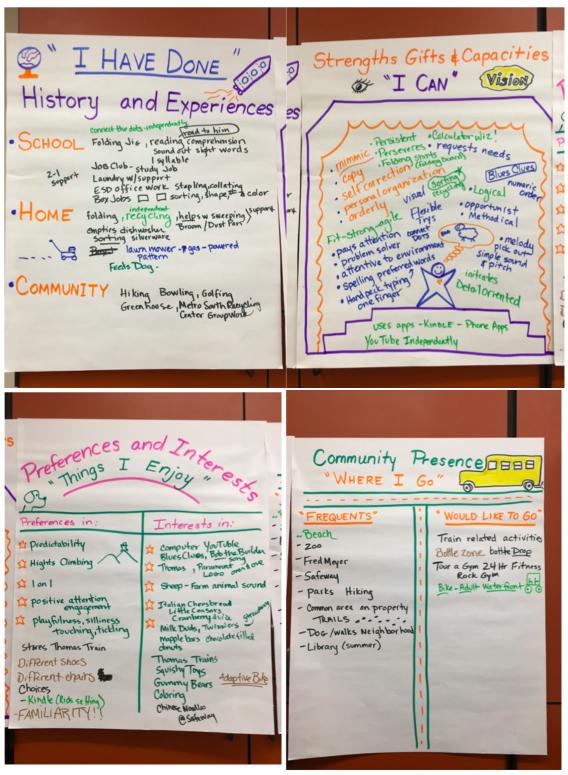
What does NOT work for me

- Unmet sensory needs Lack of clear, simple direction Lack of time to process direction
- Assuming I know what to do because I didn't ask any questions Assuming I'm not listening because I'm
- moving/fidgeting
- Transitioning or stopping something I haven't finished
- Isolation
- Environments (loud, cluttered, crowded) Boredom
- Missing medication
- Assuming my behavior is the problem— consider that my resistance/arguing may be a possible sign of stress or that I do not understand what is expected.
- Showing emotion when dealing with my frustration/silliness/anger, it's very important for me that you stay calm.
- Not being released to the bathroom when I ask—this is not an escape technique for me.



* One-pager Examples Credit: FACTOregon.org

Appendix B: 8-Steps Mapping Examples*



^{*} Mapping Examples Credit:

Kriss Rita, Transition Network Facilitator - Clackamas Education Service District, Oregon Appendix C: Quadrant Example

NAME: BILLY STUDENT GRADE: 12

ASPIRATION(S): Get my high school diploma this year. Working and living on my own or with roommates by age 25. Be a camera operator for college or professional sports teams by age 30.

SUPPORT (Helpers): Mrs. Student (Mom), Mr. Smith (Transition Teacher), Ms. White (Youth Transition Program)

COMMUNITY PARTICIPATION

- Received Tri-Met HOP Card on 11/15/2020
- Uses Tri-Met independently
- Member at Planet Fitness
- Attends Church and Church Youth Groups
- Third year member of PHAME
- Fifth year on Team Turkey bowling team
- Volunteers at YMCA twice a week

POST-SECONDARY EDUCATION/ VOCATIONAL TRAINING

- Film production class at PHAME (*Ms. White helping)
- Job Skills course at PCC in the fall, 2020 (*Mr. Smith Helping)
- Setting up account with WorkSource Oregon in May, 2020 (*Mr. Smith helping)
- SWIFT Program at Portland State University, Summer 2020 (*Ms. White helping)

EMPLOYMENT OPPORTUNITIES

- Possibly filming high school football games for Jefferson High School, September, 2020 (*Ms. White helping)
- Volunteer at YMCA (*Mom helping)
- Application in at Oaks Park Amusement as of February, 2020 - Custodian (*Ms. White Helping)
- Revamping resume, done by June, 2020 (*Mr. Smith helping)

INDEPENDENT LIVING

- Completes chores at home using chore chart (*Mom & Mr. Smith helping)
- Cooks own meals 3 times a week (*Mom helping)
- Shops with Transition Program twice a month (*Mr. Smith helping)
- Uses Naviance program for College and Career readiness (*Mr. White helping)
- SWIFT program at Portland State Summer 2020 (*Ms. White helping)
- Travel to Grand Canyon in Summer of 2021 (*Mom helping)

Appendix D: IEP Preferences, Interests, Needs, Skills (PINS) example

SUMMARY OF PRESENT LEVELS OF PERFORMANCE FOR TRANSITION PLANNING

<u>Preferences:</u> Ashley would like to work in the daytime. To work in a large area. She is okay with either sitting or standing or a combination of both. She would like a slower pace with multiple persons available to help her. She would work part-time or full-time. She would like to be close to home or her place of living in relation to his workplace - about 15 miles away would be maximum. She would like to drive or ride in a car, but is OK with taking the bus. She would like to work inside.

<u>Interests:</u> Driving forklifts, working for a big corporation (Costco, Home Depot), cooking, sports (Football, basketball), being social with friends, 80's music, playing video games.

<u>Needs:</u> Ashley needs time to process thoughts, extra breaks, written directions, text-to-speech for longer than two paragraph reading, transportation assistance, reminders (schedules, digital clocks, access to her phone), money management assistance, mapping and directional help, basic computer help.

Skills: Cooking, communication, exercise and nutrition, cell/smart phones, setting up areas for working, planning, following directions, dependability.

Appendix E: IEP Transition Goals examples

SUMMARY OF AGE-APPROPRIATE TRANSITION PLANNING MEASURABLE POST-SECONDARY GOALS:

<u>Training:</u> Within six months of completing a transition program, Ashley will attend classes and training to become OSHA certified in the area of forklift safety operation.

Education: Within six months of completing a transition program, Ashley will obtain an entry-level position in a warehouse environment to be a warehouse facility employee full-time in or around the Portland Metro area.

Employment: Within a year of completing a transition program, Ashley will work with DHS Disability Services to explore independent living in areas within local transportation to her workplace.

<u>Independent Living Skill:</u> Training Within six months of completing a transition program, Ashley will receive training in an entry-level position in a warehouse environment to gain the necessary skills to be a warehouse facility employee full-time.