

TRANSITION PLANNING WORKBOOK

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THE PURPOSE OF THIS WORKBOOK

The purpose of the workbook is to gather information before the transition planning meetings. This information will enable all concerned to develop goals for the student's future. As you read through this workbook it will prepare you to be actively involved in all planning meetings.

As you use this workbook an identical workbook will be provided for any other people who will be attending the transition planning meeting e.g. family members, teachers, consultants and representatives from community agencies. **You are asked to complete any parts which reflect your knowledge of the student.**

In using this workbook you are starting a process by which the student's strengths and needs will be identified by all involved. These will then be translated in goals directed towards the student's life both in and after school. Family, school and support agencies will all gain knowledge of the student and be equipped to provide a program that is both integrated and transitional.

THE IMPORTANCE OF TRANSITION

The transition through upper elementary, junior high and secondary school to life after school for students with special needs is a major area of concern to educators, parents, students and agencies everywhere.

Many students with special needs are at [higher risk of being unemployed, uninvolved in community life, unable to access further education or training and , ultimately, unable to lead fulfilling lives.

(Freeze, D.R. 1995, p.8)*

The Transition Plan is a planning process designed to make the final school years before graduation especially meaningful to the student's future life. It is a planning process based on a commitment by a group of individuals to form a network of support to assist an individual in planning for the future. It challenges the student, and his or her family, teachers and other supporters to:

- Recognize where the student is now
- Define and clarify future needs and goals
- Identify and recognize the people who must be involved in order to achieve those goals
- Decide on actions for the next year
- Decide on actions for long range plans

This coordinated planning process is designed to address student needs as they move from elementary programs into junior high school or can be used during the grade 10, 11 and twelve years as the student completes their high school program. The outline which follows identifies briefly the steps and processes used in assisting the student and family through the final stages of school and into the community at large.

*Freeze, D.R. (1995). Promoting successful transitions for students with special needs: A handbook of best practices for the education of students with special needs in transition from school to work and adult life. The Canadian Council for Exceptional Children.

THE TRANSITION PLANNING PROCESS

Role of the Teacher

- set meeting date with family & student, consultant/s and anyone else to be involved in the meeting
- book facility and facilitator
- ascertain from family & student who should be included in the meeting e.g. other family members, a close friend of the family, an adult who has worked with the student, a therapist who has worked with the student, any person who may play a significant role in the student's future, etc.
- ascertain whether the family would like a representative from Services to Adults with Disabilities to be at the meeting (this person can provide information and links with community and government services which can be accessed in the future. (This person will be the most valuable during the grade 11 or 12 planning process)
- ensure that all involved people have the correct meeting date and time
- distribute a copy of the Transition Planning Booklet to everyone who will be attending the meeting
- ensure that all involved people understand how to use the booklet
- ensure that the facilitator has a copy of the Transition Planning Booklet
- read and complete all relevant parts of the Transition Planning Booklet before the meeting
- bring the booklet to the meeting

Role of the Family & Student

- set meeting date in conjunction with the teacher
- include any people who are involved with the student outside the school
- read and complete all relevant parts of the Transition Planning Booklet before the meeting
- bring the booklet to the meeting

Role of all other involved people

- set a meeting date in conjunction with the teacher
- read and complete all relevant parts of the Transition Planning Booklet before the meeting
- bring the booklet to the meeting

Role of Government and Community Agencies

- set a meeting date in conjunction with the teacher
- read and be familiar with the Transition Planning Booklet before the meeting
- bring the booklet to the meeting

THE ROLE OF THE FACILITATOR

The facilitator can be selected by the teacher or the family or by both parties working together. If a school administrator is chosen to fill this role we have found advantages for all concerned. The administrator has some knowledge of the student and the planning process while not being closely involved in daily programming. Through taking part in the planning process the administrator is able to increase knowledge of the student and gain an understanding of the programming needs of the student both in the school and the community.

The role of the facilitator is to chair the transition planning meeting and to assist all those present to follow a pre-set agenda. The agenda can follow any format but we have found that this sample agenda works extremely well and serves to guide everyone through the meeting in an efficient manner while allowing all present to have a voice and to play an equal part in the planning process. An issue requiring in-depth discussion can be tabled as an agenda item for a future meeting between those concerned with the issue

The facilitator should also ensure that there is a designated recorder for the meeting. The recorder uses Part D. (pp. 21-22) to record identified needs and strengths. At the end of the meeting, action plans and people responsible for those actions are also recorded.

SUGGESTED AGENDA FOR A TRANSITION PLANNING MEETING

1. Introductions

2. **Outline the format** to be followed for this meeting (see #5. below)

3. **Identify a recorder for the meeting.** This person will use the Transition Planning Meeting Form (part C) on pp. 21 - 22 of the booklet

4. **Allow the family the choice as to whether they would like to speak first.** If so then the agenda will be as follows: *(if not then the school and the family will be reversed)*

5. During this part of the meeting **the recorder will note Strengths and Needs** using the Transition Planning Meeting Form (part C)

6. Daily Living Skills

- Family Share their notes and thoughts for Daily Living Skills
- School staff share their notes and thoughts for Daily Living Skills
- Others share their notes and thoughts for Daily Living Skills

7. Personal Social Skills

- Family share their notes and thoughts for Personal Social Skills
- School staff share their notes and thoughts for Personal Social Skills
- Others share their notes and thoughts for Personal Social Skills

8....**and so on** through each section of the booklet i.e. Vocational, Academic, Medical Therapy, Financial/Guardianship/Trusteeship

9. **The recorder summarizes all the strengths and needs that have been identified for Daily Living Skills**

10. The group works together to **develop an action plan and goals for Daily Living Skills**. These are then recorded on the Transition Plan Meeting Form (Part C)

11.**The same format is followed for each subsequent section** of the planning booklet. All meetings except those involving financial/guardianship/trustee issues will end here.

12. The final section is for Financial/Guardianship/Trusteeship concerns. At this stage of the meeting the student's needs will have been identified by the family and **a representative from Services for Adults with Disabilities** should be available to provide information and suggestions about services which may be available to the student after the age of 18.

13. **Review Action Plan** and people responsible for the actions.

14. **Set date for the next Transition Planning Meeting**

15. **Set dates for any meetings that will be held as a result of the action plan developed at this meeting**

16. **Adjournment.**

- Following the meeting a copy of the Transition Planning Meeting Form on which the meeting was recorded should be sent to all those who were present at the meeting.

TRANSITION PLANNING PAGES FOR

(Name of Student)

(date)

_____/_____
(school year) (present grade)

Throughout this workbook six aspects of the student's life are addressed. They are:

- **Daily Living Skills**
- **Personal Social Skills**
- **Vocational Skills**
- **Academic Achievement**
- **Medical /Therapy Needs**
- **Financial/Guardianship/Trusteeship**

The workbook pages are arranged in the following sequence:

PARTS A. questions to consider while completing the planning booklet

PARTS B. identifying the student's future needs and areas of concern

PART C. At the end of the book is a table to be completed AT THE TRANSITION PLANNING MEETING as a record of identified needs how they will be addressed and by whom.

and concerns,

Parts A are for your guidance.

*Parts B are to be completed **before** the Transition Planning Meeting.*

*Part C - The table will be completed **during** the Transition Planning Meeting.*

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Daily Living checklist.

DAILY LIVING

Where will the student live?

- with family members
- in an apartment (with supports as needed)
- in a group home
- on his or her own

How will the student get around the community?

- handi-transit
- city transit
- in his or her own vehicle
- taxi
- walk
- bicycle
- driven by family member

What activities and services will the student take part in?

- fitness or sports activities
- clubs
- religious activities
- entertainment
- shopping
- therapy

How will the student maintain physical fitness?

- community resources
- personal exercise program
- therapy program

What equipment does the student need to maintain physical fitness?

- bike
- access to weight room/gym facilities

What level of independence will the student have?

- able to go shopping on their own
- personal care
- able to be home alone for a period of time
- able to prepare simple meals or snacks
- able to manage personal finances
- able to select/purchase/care for clothing

B. IDENTIFY THE STUDENT'S FUTURE NEEDS & AREAS OF CONCERN

DAILY LIVING	Is this an area for future programming? Yes or No	Notes and Comments
Living Arrangements		
Facility Usage		
Fitness		
Leisure		
Health		
Personal care		
Managing Personal Finance		
Buying, Preparing & Consuming Food		
Buying & Caring for Clothing		
Getting Around the Community		
Citizenship		

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Personal Social checklist.

PERSONAL/SOCIAL

Who will the student spend time with?

- family
- friends
- peers
- co-workers
- paid care workers
- volunteers

Will the student have friends?

- at work
- in the community
- among peers

Is the student able to regulate behaviours depending on the circumstances?

- with family
- with friends
- at work

Will the student need guidance with his/her sexuality?

- Female issues
- Male issues

B. IDENTIFY THE STUDENT'S FUTURE NEEDS & AREAS OF CONCERN

PERSONAL/SOCIAL	Is this an area for future programming? Yes or No	Notes and Comments
Independence		
Relationships		
Cooperation		
Self Esteem		
Socially Responsible Behavior		
Emotions		
Communications		
Decision Making		

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Vocational checklist.

VOCATIONAL

Will the student have a job?

- yes
- no
- will he or she be doing something each day outside of the home

What kind of work will the student do? Where?

- competitive employment
- supported employment
- sheltered workshop
- volunteer work

B. IDENTIFY THE STUDENT'S FUTURE NEEDS & AREAS OF CONCERN

VOCATIONAL	Is this an area for future programming? Yes or No	Notes and Comments
Employment Possibilities		
Work Habits & Behavior		
Physical-Manual Skills		
Seeking, Securing & Maintaining a Job		
Physical Adaptations		
Requires Support in the Workplace		
Occupational Safety		
Social Opportunities		
Job Performance Modifications		

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Academic checklist.

ACADEMIC

When will the student graduate from school?

- before or after age 18
- when he or she gets a job
- when he or she is accepted into an adult program

What does the student need to learn?

- while he or she is in school
- outside the school

Can the student apply knowledge/skills learned at school to real-life situations?

- at home
- in a work-experience placement
- in the community
- with support
- independently

B. IDENTIFY THE STUDENT'S FUTURE NEEDS & AREAS OF CONCERN

ACADEMIC	Is this an area for future programming? Yes or No	Notes and Comments
Listening		
Speaking		
Reading		
Writing		
Math		
Problem Solving		
Competence in Real-Life Situations		

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Medical/Therapy checklist.

Medical / Therapy

Does the student have special medical needs?

Does the student require therapy?

How often is therapy required?

Is the service available in the community?

- through the health authority
- from private practitioner or agency

Does the therapy require special equipment?

- mat
- therapy ball
- therapy pool

Who can administer the therapy?

- trained personnel
- care giver
- parent

B. IDENTIFY THE STUDENT’S FUTURE NEEDS & AREAS OF CONCERN

MEDICAL/THERAPY	Is this an area for future programming? Yes or No	Notes and Comments
Physical Therapy		
Occupational Therapy		
Speech/Language Therapy		
Psychology		
Vision/Hearing Services		
Medical Services		

A. QUESTIONS TO CONSIDER

These questions should only be used as guidelines. They are designed to stimulate and focus your thoughts as you complete the Financial/Guardianship/Trusteeship checklist.

FINANCIAL/GUARDIANSHIP/TRUSTEESHIP

Will the student require guardianship?

Will the student require trusteeship?

- formal
- informal

Will the student be able to manage his/her own finances?

- need trustee
- need training to manage finances

Will the student require funding?

- AISH
- individual funding

Do you need to know more about

- guardianship
- trusteeship
- sources of funding

B. IDENTIFY THE STUDENT’S FUTURE NEEDS & AREA OF CONCERN

FINANCIAL/ GUARDIANSHIP/ TRUSTEESHIP	Is this an area of concern? Yes or No	Notes and Comments
Guardianship		
Trusteeship		
Finance A. Available Funding		
B. Living Expenses housing costs		
living expenditures		
program costs		
program worker		
personal care attendant		

C. TRANSITION PLANNING MEETING FORM

THE FOLLOWING TWO PAGES WILL BE COMPLETED AT THE TRANSITION PLANNING MEETING.

THEY WILL BE USED TO RECORD A SYNOPSIS OF THE INFORMATION WHICH ALL INVOLVED BRING TO AND SHARE AT THE MEETING.

(This page can also be used for notes)

C. TRANSITION PLANNING MEETING FORM

_____ / _____ (school year) (present grade)	DATE: _____
STUDENT: _____ TEACHER/S: _____	PARENTS/GUARDIANS: _____ OTHERS INVOLVED: _____

Content Areas	Strengths	Needs	Actions	Follow Up	By Whom?
Daily Living					
Personal Social					
Vocational					

TRANSITION PLANNING MEETING (continued)

Content Areas	Strengths	Needs	Actions	Follow Up	By Whom?
Academic					
Medical/ Therapy					
Financial/ Guardianship/ Trustee					

USE THIS PAGE TO WRITE DOWN ANY ADDITIONAL QUESTIONS OR GOALS

INFORMATION FOR FAMILIES

WHAT QUESTIONS SHOULD I ASK ABOUT AGENCIES?

- Will this agency meet the student's needs?
- What is the agency's philosophy and is it similar to mine?
- Is the agency committed to community-based programs?
- What are the criteria for admission?
- Is there a waiting list? If so, how long?
- What qualifications/education do the service providers have?
- To what extent are parents/family members involved in the service delivery?
- How long does support/follow-up from the agencies last?
- What costs or fees are involved?
- What disciplinary action or consequences do they utilize?
- What agency support is available for daily workplace activity
- What agency support is available for support in the home?

CONTACTS FOR INFORMATION AND ASSISTANCE

❖ Public Guardian Office

Pursuant to the Dependant Adult Act, the Office of the Public Guardian provides a legal guardian for adults who are unable to care for themselves and make reasonable judgments about personal matters.

❖ Public Trustee Office

Provides administration of estates of mentally incapacitated persons who have been declared by the courts incapable of managing their personal affairs.

❖ Assured Income for the Severely Handicapped (A.I.S.H.)

This service is for individuals who have no other source of income.

These Alberta government agencies may be contacted through the Alberta government RITE # 310-0000.

Through this number you can also contact the local district office of **Child & Family Services, Services for Persons with Disabilities and Consumer & Corporate Affairs** for additional information.

There are also a number of private agencies who offer living and workplace supports.