

FIELD GUIDE FOR

Excellence In Person-Centered Transition Planning



*Using a student-directed approach
with youth in special education programs*

The Northeast Arc Transition Collaboration



Acknowledgements

Welcome to the Northeast Arc Transition Collaborative *Field Guide for Excellence in Person-Centered Transition Planning*. This publication is a product of a multi-year collaboration between five human service provider organizations and a number of school districts in the Capital Region of New York State.

The field guide is a synthesis of a dynamic learning opportunity that was made possible through the generous financial support of the May Stanley Foundation and administered under the auspices of the Arc of the US. The charge of the grant was to develop a replicable, sustainable model for excellence in transition planning. How to get there was left entirely up to us.

We are deeply grateful to the May Stanley Foundation and to The Arc of the US for entrusting our learning collaborative with the authority and the autonomy to design and implement a model for transition that crosses traditional roles and boundaries to forge mutually beneficial partnerships within and across key stakeholder groups. We absolutely believe that together, we are better.

We would also like to acknowledge the contribution of our principal consultant, Carol Blessing. In addition to developing this field resource, Carol served as a guide to our project, crafted and facilitated countless meeting agenda's and conducted training events that built both competence and confidence within our learning collaborative. Carol is the co-author of A Framework for Planning®, the person-centered planning methodology that is central to the work in this project. She and her co-author, Connie Ferrell, have allowed us to share their tool and resources through this guide.

Last, we would like to thank each of our home service organizations for supporting our involvement in the learning collaborative. Time away from the office to attend meetings and trainings; hosting meetings and trainings at the office; allowing us to invite other staff members into meetings and trainings...all recognized and truly appreciated. We could not have done this without the unwavering commitment and support of our executive directors and agency colleagues.

Jim Blessing

Associate Executive Director

The Arc of Rensselaer County



Introduction

Several years ago, The Arc of Rensselaer County in Troy, NY received funding through a Wal-Mart Charitable Foundation grant in building person-centered planning with school districts. Their work in integrating person-centered practices into the transition planning process with youth with disabilities and in partnering successfully with school districts paved the way to applying for and receiving the May Stanley Foundation grant, one of only four Arc chapters in the United States to be awarded this funding.

The Arc of Rensselaer County saw the May Stanley Foundation grant as an opportunity to not only benefit students receiving special education services but as an opportunity to strengthen partnerships among sister Arc county services and their local school districts. To this end, they proposed the idea of forming a regional learning collaborative for transition excellence that would work together to share ideas, tools and other resources so that excellent transition planning would be available and responsive to each region's unique demographics. Thus, the Northeast Arc Transition Collaborative consisting of chapters from Rensselaer, Saratoga, Montgomery, Schoharie and, Schenectady counties, the regional BOCES, and a number of local school districts, was born. Along the way, the learning community was joined by representatives from the Rensselaer County One Stop/ Workforce Investment Act (WIA), the Rensselaer Regional Chamber of Commerce and staff of the NYS Office for People with Developmental Disabilities (OPWDD).

The mission of this vibrant learning community was to explore, and sometimes create the avenues through which a community provider organization could build partnerships with local school districts in order to expand the transition planning options, opportunities and experiences made available to youth living with a disability and their families. The primary vehicle for this was to infuse person-centered planning into the Individualized Education Program (IEP) planning process. The Northeast Arc Collaborative for Transition Excellence, offers this guide as a way to share their learning with the hope that it will be useful to others embarking on a similar journey.

The field guide is organized to support the following objectives: to provide information about how to develop a learning community and to draw from the Northeast Arc Transition Collaborative experience (called Tidbits); to synthesize lessons learned (called Take Away Ideas); to provide concrete examples when possible and; to provide functional tools (called the Framework for Planning Toolkit) and other resources. We think there is a little something for everyone inside these pages.

Welcome!



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Northeast Arc Collaborative for Transition Excellence

A Little Back Story

Some of you reading this might be old enough to remember a brilliant marketing campaign for the Reese's peanut butter cup. Two strangers are walking toward each other from opposite directions on a crowded street. One of them is enjoying eating a chocolate bar while the other is savoring the taste of peanut butter straight from the jar. As luck would have it, the two collide and there is an accidental mingling of snacks. "Hey, you got peanut butter on my chocolate!" "Hey, you got chocolate in my peanut butter!" Nibble. Nibble. Smile. And chocolate, as we knew it, was never the same.

So what's this got to do with excellent transition planning?

Well, imagine for a moment that you are one of the strangers walking down a crowded street only instead of chocolate (or peanut butter), you are concentrating on how to better prepare young people for life in the community. You are frustrated year after year by the number of students with disabilities who age out of school and show up at your office expecting services. At first blush, they have no focus, no marketable skills and little to no experience navigating community life as an adult. You have to start from scratch with this kid on top of the scores of other individuals who are also demanding your attention.

So caught up in this scenario are you that you walk smack dab into that other stranger who just so happens to be equally distracted trying to figure out how to better prepare young people with disabilities for life in the community before they leave the school system while struggling to juggle new Core Standards and No Child Left Behind within IDEA 04 regulations. They are frustrated that year after year they are at a loss as to how to discover and maximize the unique strengths, skills and potential that they are certain each student possesses. They also know that to coax these gifts forward, each child requires uniquely tailored assistance and non-traditional academic experiences taking time that they do not have to spend.

Crafting A Blended Model

In 1996 The Arc of Rensselaer County in New York State took this scenario head on with the Troy City School District and together created a blended model for excellence in transition that addressed issues and concerns of the school, of the kids, of families, of the community provider, and of community business people. It was designed using a student-centered planning approach to meet three basic objectives:

- *increase engagement in school (reduce the dropout rate)*
- *increase parental/care-giver involvement*
- *increase access to work experience, paid employment and community support*

This founding model has been greatly expanded since then and serves as the foundational framework for the Northeast Arc Collaborative for Transition Excellence. The successful implementation of the model requires active involvement from key stakeholders: the school district, teachers and school personnel, students, families, community businesses, state and county agencies, local colleges and universities, adult service provider agencies and networks. All these entities are also customers. They have skin in the game, so exemplary transition practices make sure they are all at the table.



TAKE AWAY IDEAS:

Chocolate in the peanut butter or peanut butter on the chocolate? Does it matter?
At the end of the day, it's about a quality product and a satisfied customer.
Which takes good listening. Oh, and sharing.





TIDBIT 1

Find a Buddy or Five. Build a Functional Learning Community

“It takes a village to raise a child.” **TRADITIONAL AFRICAN PROVERB**

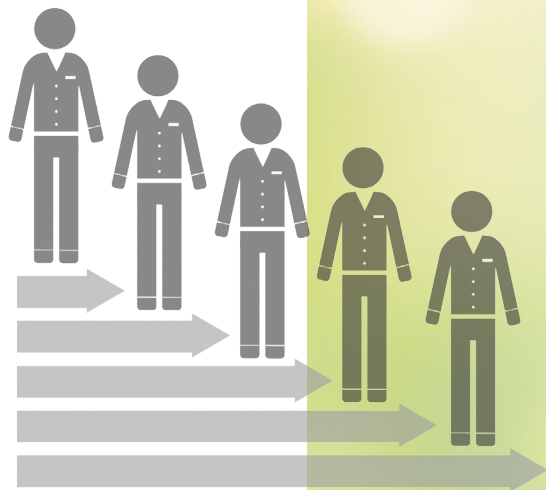
TIDBIT 1

OBJECTIVES

Understand the value of working collaboratively with other stakeholders.

To identify and capitalize on the strengths, capacities, resources and potential each member brings to the group.

To introduce a planning method for discovering collective interests, needs, capacity and potential.



The truth of the matter is that everyone is struggling to do “more with less.” The challenge that every organization must contend with and the question that must be answered is *how to remain fiscally viable and provide quality programs and services in the face of a highly competitive market economy?*

Who to invite to the party?

Determining that “together is better,” The Arc of Rensselaer County, (lead agency for the Northeast Collaborative) identified and invited select potential partners to explore the possibility of co-creating the future in transition planning for youth with disabilities. Below is a short list of criteria recommended in selecting possible partners:

- A proven willingness to share and get along with others.
- Openness to learning and in saying “I don’t know.”
- Commitment to community inclusion and person-driven outcomes.
- Geographic proximity and interest in building a service network.
- Ability to commit to the mission and to keep promises.

Everyone Brings Something To Share

Once the group is established, partners or partner-teams (i.e. more than one representative from the same organization), in the Collaborative pool respective resources that are likely to expand and enhance the capacity of the whole group. This will help you not just to survive, but to thrive! And to work better together.

Here are some examples of pooled resources built within the Northeast Collaborative:

- Transition Planning expertise (RenArc)
- Personal Outcome Measures (POMs) expertise (Montgomery Arc/Liberty)
- Person-Centered Planning expertise (Consultant)
- Supported Employment expertise (all)
- Business Planning expertise (Montgomery Arc/Liberty)
- Documentation streamlining (Schenectady and Saratoga)
- Education Policy Liaison, Letah Graff, Transition Specialist
(Regional Special Education Technical Assistance Support Center, RSETASC)
- Network to state funding and regulatory entities for consultation (RenArc)
- Network to school personnel—school district expertise for consultation (Schoharie)



Build A Better Vision

During the first formal meeting of a new learning community, it is a good idea to have the group engage in a facilitated process to develop a shared vision for excellence in transition planning and support as well as to explore the unique and shared strengths, interests and wisdom each partner group brings to the community. This is the “positive core” that will support the community in achieving its vision. Notice the use of the word excellence. Hang on to that word for dear life. It will help to steer clear of building mediocre transition services that perpetuate “good enough” and “better than it was” thinking. Transition services should be based on what transition excellence “looks like” when it is accomplished. This serves to ground the vision or the mission of the group, establish goals and objectives and later inform the design and delivery of transition services and support.

For example:

- Students attend and direct transition planning meetings.
- Students have jobs that pay them well and build on their interests and competencies.
- Post-secondary education supports career planning and/or advances skill sets.
- Post-secondary outcomes are clearly identified in the IEP.
- Youth are actively involved in meaningful associational life and valued social roles in the community.
- The young adult is recognized and appreciated by what they contribute to society as a valued citizen.
- Families and care givers understand and play an active role in the transition planning process.
- Adult service providers are seen as a partner resource to school districts.

Develop A Collective Identity

To organize their learning around these goals and objectives, and to create a positive profile of the group, the Northeast Collaborative used a modified version of a person-centered planning tool, called a Framework for Planning to begin building a collaboration identity. A blank copy of the modified template, the Framework for Planning Transition Collaborative Profile, can be found in the appendix of this document. The group chose to use this tool for two reasons: 1) to encourage creativity and 2) to get familiar with using a tool that would later be used throughout the project within the group and with schools/students.

A primary task for a newly forming learning collaborative is to identify individual areas of strength and expertise that would be useful to the mission. This becomes the “positive core” of the collective community. It is important for a learning community to start right off acknowledging and appreciating the diversity within the group. It is a source of positive energy that will be tapped and strengthened throughout the project.

Intro to the Framework for Planning Transition Collaborative Profile

The Framework for Planning Transition Collaborative Profile template is comprised of seven areas. Each section provides a distinct facet in what when fully completed, will create a composite of strengths, interests, priorities, values and resources that will be synthesized into a collective identity. The whole becomes greater than the sum of its parts.

The profile areas or “facets” are as follows:

Attributes/Positive Reputation – how is your organization known? What positive qualities and characteristics are attributed to your organization?

Area(s) of Expertise – what specific areas could your agency “write the book” on? What skills/talents are sources of pride for your agency?

Driving Principles/Values – what are the intentions of the organization’s work? What ‘higher purpose’ is being met because of what your organization offers to people with disabilities, their families, the community, and/or the world?

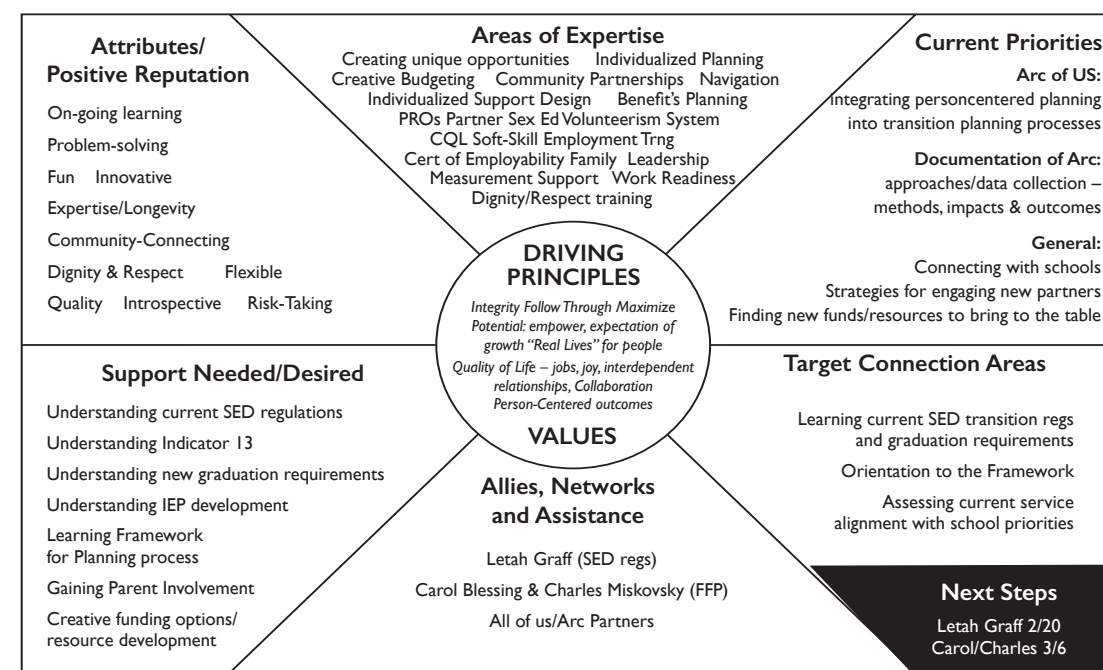
Current Priorities – in relationship to The Arc of the US grant, what are first-order-of business issues/opportunities that your organization is hoping to address? Why is it important to the organization to participate in this?

Support/Resources Needed/Desired – what are the areas that your organization would appreciate getting additional knowledge, technique, and/or practice with? What obtainable/available resources would be necessary to move forward?

Allies, Networks & Assistance – Who do you already have to work with that may be supporters, anchors, influencers, door-openers, etc.

Target Connection Areas – what contacts/connections/outreach must happen immediately and in the very near future that will get things moving forward? To whom should an invitation be extended to join the project? What arrangements need to be made to get the ball rolling? What it’s need to be dotted and t’s crossed to ensure full support?

Purpose: To co-create exemplary transition practices.



Northeast Arc Collaborative for Transition Excellence Positive Profile
Adapted for the Arc of the US/Arc of Renss County Transition Partner Project



TAKE AWAY IDEAS:

Start with the end in mind - know what excellence in transition planning looks like. Use what is already available that will support the group’s goals. Create a shared vision. Harness individual strength for the collective whole. Share. Share. Share. Remember that it really does take a village.



TIDBIT 2

Got Vision? A Vision Without a Plan Is Just Wishful Thinking.

“Vision without action is a daydream. Action without vision is a nightmare.”

JAPANESE PROVERB

Directly on the heels of establishing a shared vision and identifying the collective positive core comes the responsibility to establish specific objectives and preliminary action plans to get the work started. This task is where the individual partner-teams can customize the plan for their particular agency, (as long as it aligns with the shared vision), to meet the unique interests and needs that brought them to the table.

Since The Arc of Rensselaer County already had a fully developed model for transition planning, the Collaborative chose to use it as a foundation to build from, leaving room to customize its design to meet the unique interests and needs of the individual partner group. Below is a basic overview of the core components of the transition model used by the Northeast Collaborative as they occur for each grade level.

The Arc of Rensselaer County Transition Model

8th Grade Engagement and Assessment Phase: students participate in career assessment inventories and participate in school-sponsored career days to begin to think about the world of work.

9th Grade – Expanded Assessment Phase: students deepen their thinking about current employment interests through active attendance in guest speaker sessions, college and vocational school programs and local career fair activities.

10th Grade – Community Exploration Phase: students are provided the opportunity to tour community businesses, talk with employers and participate in job shadow experiences. Employment interests/career assessments continue to be refined.

11th Grade – Discovery Phase: students become involved in a comprehensive analysis of their preferred learning style, college preparedness, strengths, capacities, and begin to narrow their future orientation, by participating in person-centered planning, touring college campuses and businesses, working in internships, and initiating connections to community service provider agencies (i.e. referral to state VR and other appropriate provider referrals).

12th Grade – Implementation Phase: students build from the previous years’ experiences to further pinpoint post-secondary education outcomes related to continuing education and/or employment. In this year the activities are customized to address these interests and may include attending workshops on college preparation and financial aid; college campus tours, classroom audits and/or meetings with placement/advisement counselors; college application/enrollment; additional employment internships and/or paid employment; benefits counseling and planning; enrollment in state VR and linkages to appropriate service provider resources.

TIDBIT 2



OBJECTIVES

Highlight the importance of developing objectives that support the vision and prompt action

Emphasize the importance of customizing the group’s collective goals to address individual stakeholder’s interests and needs “at home”

Provide an example of shared objectives formed by a group





It should be noted that at any given time throughout each phase of implementing the transition model, students are also provided the benefit of travel training using public transportation; participating in a guest speaker series; varied career fairs; opportunities for summer employment (students in grades 9-12); driver permit study groups (students in grades 10 -12); mock interviews and; understanding and completing job applications.

While it is useful to get the action plan rolling in the core group setting, the real work of amending, refining and completing details of the plan needs to happen back at each organizational’s home base. This ensures that key stakeholders (representatives from groups that are directly impacted by plan activities, including school personnel, families, etc.) are included in the process. It is true that “we don’t know what we don’t know” so it is absolutely critical to include local stakeholder involvement when finalizing objectives and developing an implementation plan.

Northeast Transition Collaborative Objectives

Here are examples of some of the objectives developed by the Northeast Transition Collaborative team members to launch the project:

GOAL 1:

Promote students’ self-determination and self-advocacy to empower students to lead their own life.

Objective:

- 1. Promote person-centered frameworks to assist students in defining a vision for the future to influence and support student-centered and student-driven IEP meetings.
- 2. Provide work-based experiential learning, self-directed learning, and career exploration opportunities available to students with disabilities.

GOAL 2:

Increase informed student and parent participation and involvement in decision-making for transition/ education planning, life planning and community integration.

Objective:

- 1. Become proficient in the use of person-centered planning as a primary method for working with students and their network to identify positive post-school outcomes.
- 2. Streamline access to information and coordination of relevant education and service programs to minimize confusion and uncertainty.
- 3. Employ plain language with families and students.
- 4. Acknowledge the expertise and value that families bring to the transition planning process.

GOAL 3:

Improve collaboration and system linkages at all levels between and across providers and school districts.

Objective:

- 1. Fully understand and respond to unique needs for transition support posed by districts. Create individualized transitional services in collaboration with all school district contracts and service provider agencies – when possible, include in-kind practical services (transportation, consultation, grant development, paper work administration, etc.), in lieu of payment in areas that can strengthen the partnership.
- 2. Provide cross-training and other methods to promote collaboration between general education, special education and service agency student assessment, IEP, transition planning and optimal learning support.
- 3. Ensure that appropriate community service agencies participate systematically in the development, and where appropriate, implementation of post school transition plans.
- 4. Promote access to a wider array of community services by mapping community assets and developing local active education/business networks in and around the community for continuing education; employment; situational assessment and membership opportunities directly tied to IEP/ Transition goals
 - a. In and around the vicinity of the school/district
 - b. In and around the student’s neighborhood.

GOAL 4:

Engage a broader range of young people in transition supports.

Objective:

- 1. Develop the capability to support students with disabilities during their first year of college to successfully complete their freshman year of college/trade school study.
- 2. Identify strategies to strengthen our position with existing school district partners to insure sustainability.
- 3. Expand capacity to support middle school students in transition planning.

GOAL 5:

Ensure student access to and full participation in postsecondary education and employment.

Objective:

- 1. Ensure student self-advocacy and self-determination to inform and provide direction.
- 2. Engage in integrated service planning. When appropriate, IEPs will be coordinated and aligned with individualized service plans and will reflect clear, positive, possible strengths-based post-secondary school objectives.
- 3. Identify specific types and levels of accommodations, assistance and supports a student will need to participate fully in a post school environment.
- 4. Promote collaborative employer engagement.
- 5. Promote collaborative continuing education, college and university engagement.
- 6. Provide accurate and timely information on federal and/or state incentives that promote/support education advancement and/or employment.



Importance of Individualizing Project Objectives

Individualizing project objectives is important at this point of the design process since each group in a given learning collaborative will probably be at varied stages of developing and/or implementing of transition programs and services. In addition to ensuring that the learning for each group in the Collaborative is timely and relevant, there is the added bonus of a shared leadership dynamic that emerges when diverse learning/consulting are invited to come forward.

For each goal and objective, be sure to assign a specific course of action, or action plan. A solid action plan includes how the objectives for the associated goal will be attained, who will be responsible for completing the task, the timeframe in which the task will be completed and a metric or metrics for assessing the effectiveness of the strategy/intervention. What will be the result of the action? Goals and objectives are long range, generally broad statements of a desired outcome. Action planning is much more narrow in scope and focus as it breaks down the necessary steps that will lead to the meeting the objective that supports a particular goal. Action steps should be concise, clear and do-able within a short time frame, ideally within a month's time or less. The last step of the planning process is the first step forward – bringing the plan to life.



Steve W. *spent hours attending speech therapy sessions during school. It was a service he neither wanted nor really needed. After completing person-centered transition planning, Steve began receiving job exploration and coaching services instead of speech. Steve left school with a part-time job doing something he loved!*



TAKE AWAY IDEAS:

Nothing about me without me. At all costs avoid designing and implementing strategies that are done 'on' or 'to' people. Anyone who will be directly affected (and even some of those who will be indirectly affected) by the group's agenda should have a say in how it plays out. And remember that leadership is not the same as job title or position. Take full advantage of the smarts people bring into the learning community collaborative. Take turns shining. Take action that stretches the group just a bit. Keep growing.



TIDBIT 3

Beat the Clock. Crash the Gate. Become a Valued Resource to Schools.

“Most people who are labelled are usually in places that are all about disability. Disability doesn’t reflect anybody’s dream.”

JUDITH SNOW / SOCIAL INNOVATOR AND DISABILITY ADVOCATE / WWW.JUDITHSNOW.ORG

TIDBIT 3



OBJECTIVES

Establish context of federal law in education

Highlight the role community service providers can play in enhancing educational outcomes

Provide an example of blending services between education and community providers to benefit all players

Introduce the practice of “reach in” services from community to school





Here is an important related observation from the Northeast Transition Collaborative experience:

Excellent transition planning pays attention to all four of the components of educational reform *at the same time* to ensure that all students are provided equal opportunity to discover and reach his or her maximum potential.

1. **Accountability and testing** – accountable to the student’s hopes and dreams for the future while assessing (testing) capacity, skill, talent and preferences in real life situations;
2. **Flexibility and local control**- meeting the interests and needs of the student through academically and experientially based learning opportunities;
3. **Funding for what works** –utilizing educational and related service resources to provide the type of assistance that the student needs to be successful and;
4. **Expanded parent options** – to be involved in supporting their son or daughter toward the kind of life that all parents want for their kids: to be healthy and safe, to be loved and accepted, to have a meaningful life with valued social roles.

Community-Based Advantage

Professionals who are not in the business of working in the field of secondary education but have a stake in transition planning have a valuable advantage over teachers. They are mobile. They get out. They know what is going on in the community and many have roles that are designed to work directly in and with community. They are on top of the latest trends in services thanks to a plethora of conference/learning opportunities. In contrast, educators move from class to class teaching established curricula and spending professional development days getting updates on the Common Core and standardized testing protocols and results. They have neither the time nor the freedom to provide individual support to students outside of the classroom. So they work hard and as best as they can to prepare students with disabilities to connect to programs and services that hopefully will be able to pick up and run where they leave off. Here is the opportunity for peanut butter and chocolate to get mixed.

Why wait until the yellow bus stops picking up and dropping kids off at school? We know that there will be kids who are leaving school without a diploma every year. Every. Year. We know that they will need places to go, things to do, that they will need assistance and support along the way. We know that their families do not want them sitting home doing nothing - or worse getting in trouble in our communities. No one wants that, especially when for many, many students *it doesn’t need to happen*.

So here’s a pondering. Rather than waiting to meet them at the door of disability service offices after the last school bell has rung for them, why not meet them in the halls of their schools? Get to know them in 9th, 10th, 11th grade? Support a seamless move from high school to adult life, say with a job, a place to live and networks of allies and assistors? Why not establish a firm role in the schools in ways that support teachers and facilitate awesome transition practices?

Here’s how that could happen: imagine for a moment that peanut butter can also be called “supported employment” or “person-centered planning” or “community inclusion” or “family support.” Now imagine that the chocolate bar is also known as “post-secondary outcomes” or “work-based learning” or “comprehensive assessment.” See where this is going? The goal is to find a way to blend them together.

Illustrating Blended Services:

Let’s go back to the four components of educational reform to look at it through the lens of blended services using a scenario with “Julia” a student in special education. This example will center on supporting Julia toward a post-secondary outcome for employment.

1. **Accountability and testing** – Julia hopes to open her own hair styling salon one day. She will understand the core requirements for achieving this dream through field trips, interviewing, and internships/situational assessments.
2. **Flexibility and local control**-Julia’s teacher, job coach and worksite supervisor will work together to align assessment criteria with appropriate and measurable educational learning standards.
3. **Funding for what works** –director of special education will identify where expenditures for related services in Julia’s IEP may be released to support community-based job coaching activities.
4. **Expanded parent options** –transition coordinator and community service coordinator will engage Julia, her family, school staff and other allies in a student-centered transition planning process to identify strategies for success.

Reaching In To Reach Out

In addition to engaging students in community-based educational opportunities, there are other ways in which professionals who are interested in supporting youth in transition can connect to schools. One of the most effective approaches to working with schools is to offer “reach in” services. You know, if the mountain can’t go to Mohammed....

Here are a few examples from the Northeast Collaborative of “reach in” services that have been provided to school districts. Some of these have been provided free of charge; others have budgeted costs built into contractual agreements negotiated with a district.

- Using A Framework for Planning person-centered tool to establish the annual IEP/Transition goals
- Using person-centered planning as a supplement to a student’s comprehensive assessment
- Conducting community-based functional vocational situational assessments to explore interests, skills and competencies
- Providing community-based functional and social assessments to observe interpersonal skills, personal safety skills, self-direction and community awareness skills
- Facilitating application processes and network connections between the student and adult service providers and post-secondary academic institutions
- Providing job development services with and on behalf of the student
- Coordinating community guest speakers in the classroom setting
- Providing community exploration activities, tours, etc.
- Providing staff development training on community resources; prevalent trends in service delivery



Designing reach in services requires three distinct, yet inter-related steps for anyone desiring to engage with schools. Effective connections can be established within the school when those outside of it:

Know their service/expertise niche areas – what innovations and achievements are they known for?

Know how these niche areas can be useful to the transition planning process – what do educators and administrators need/want for kids in special education? How can their expertise be leveraged to support these interests and meet their needs and meet educational regulations and requirements?

Work together to decide how best to meet these interests and put a transition “package” together for the district – can any/all of these be offered free of charge so to build a relationship with the district and serve as a “front-end load” to services they may be providing down the road?



Kelly *was unsure about going to college. Her family and school personnel knew she could do it. Her grades were good and she was very responsible. She remained reluctant. Conducting an FFP gave her team the insight and action necessary to support Kelly in getting to college. Kelly has a physical disability and was intimidated by having to traverse a campus. She also did not think she could manage the CDTA bus. She was not fully able to articulate these concerns. The planning process gave Kelly her voice. Through its structured discussion the team was able to identify her concerns. STAR bus was lined up (Kelly didn't know of that option) and she got a scooter for traveling between classes. Kelly is finishing up her first year of college*



TAKE AWAY IDEAS:

Remember, segregated educational settings do not prepare students for life in the real world. They prepare students for a life in segregated day programs. Go to the mountain. Offer to help. Have a good idea what good help looks like. Be a bridge to community exploration and experience. Reach out to reach in!



TIDBIT 4



OBJECTIVES

Attain job skills for
future employment

Improve social and relationship skills

Based upon his or her:

► Preferences and interests

► Future plans



TIDBIT 4

Individualized Education Plans (IEP) with Person-Centered Planning (PCP)? A Perfect Blend

“Hey! You got PCP on my IEP!”

Purpose For IEP/Transitional Planning

The purpose for IEP and transition planning is to assist students with special needs to define major life goals and roles and to move successfully from school to adult life in pursuit of those goals. Good planning is grounded in a student-driven or person-centered approach that is framed by a vision of a positive, possible future. The goals, interests, strengths and needs of the individual must be clearly understood and seated in the center of every planning process. The plan becomes the driving “voice” behind subsequent action.

For students with disabilities, post-secondary goals identified in the IEP are intended to drive transition planning by establishing annual measurable objectives and relevant activities that help the student to

- Develop self-advocacy skills
- Attain job skills for future employment
- Improve social and relationship skills

Based upon his or her:

- Preferences and interests
- Future plans
- Post-secondary goals (Long-term goals)
- Strengths and capacities
- Age-appropriate transition assessments

Purpose For Person-Centered Planning

The purpose for person-centered planning is to shift the social perception and status of people living with a disability. The idea and the ideals of democratic citizenship is at the core of person-centered work. People are born into this world with something to offer. This means that everyone is “equally entitled to reach for their higher purpose” (Mount, 2011) and to be provided with equal opportunity to do so. Responsibility comes with this opportunity: responsibility to contribute to society in ways that promote a greater good.

Person-centered planning and person-centered work aim to push past the boundaries that exclude and segregate people with disabilities from living, learning and earning the heart of community life. It organizes around a central question that asks “what needs to happen that will strengthen the direct and visible contribution this person can make to community life and what do we need to do to make sure that this happens?” (O’Brien, 2011).



For people with disabilities, person-centered planning is intended to drive service planning by establishing measurable objectives and relevant activities that help the person to:

- Lead a self-directed life
- Build on existing capacities and potential
- Expand valued social roles and relationships

Based upon his or her:

- Preferences and interests
- Future plans
- Long term goals (Post-secondary goals)
- Strengths and capacities
- Age-appropriate assessments

The Intersection of IEP and PCP

The questions that we ask are fateful. They matter a lot. Questions provide the frame in which people will concentrate time and energy.

When the question is: “what do I need to do to prepare this student for transition to an adult day service?” the options and opportunities for learning that are provided to the student will be based on the understanding of the skills that that will prepare the student to assume the role of client or consumer. The frame for focus is to get the student ready for disability services.

When the question becomes: “what do I need to do to strengthen the direct and visible contribution this person makes to community life?” the options and opportunities for learning that are provided will be based on the understanding of the skills that will prepare the student to take on the role of citizen.



TAKE AWAY IDEAS:

Discovering goals about the future based on the student’s expressed desires guides the transition planning process and IEP development in ways that will empower the student to take control of the direction for his or her life. Annual goals must be related to post-secondary goals. They help the student take one step closer to achieving their post-secondary goals. At all costs, avoid letting people tell the student that theirs is an unrealistic goal. Any goal that the student identifies will provide clues and clarification to his or her interests and image for the future. While it is helpful when post-secondary goals inform the IEP, it is not necessary that the goals match the IEP. The IEP should help the student achieve more and more independence at school and in the community and must build skills. Digging deeper beneath an “unrealistic” goal will yield insight about what and how skills can be developed. Take advice from person-centered planning pioneer Beth Mount and learn to “listen with the eyes and ears of the heart.” Grab a shovel. Dig deep.



TIDBIT 5

A Framework for Planning[®] – Turnkey to Community-Based Transition Experiences

“Beneath the favorite tale of the moment a deeper story always
lies waiting to be discovered.” **THOMAS MOORE**

A Framework for Planning was developed by Carol Blessing and Connie Ferrell in 2003. It is designed as a resource to assist people with disabilities and their support network to identify a positive profile of the person as the basis for finding direction into community life as a valued member and contributing citizen. It has been used countless times in a wide variety of settings, from dining room tables to maximum security prisons as an effective tool for targeting the person’s strengths and capacities that lead to meaningful and productive social roles. It has turned the keys that open the gate to community for hundreds of people across all walks of life.

The original Framework for Planning toolkit consists of Framework Templates (2), Framework Workbooks (2), Framework Facilitator Guide (1) and a set of 5 Framework for Planning “Pocket” Guides. The original version of the Framework for Planning Template tool was revised in 2012. The Framework for Planning and all the resources associated with it and within this resource remain the sole intellectual property and copy right of the author(s) and may be used with permission for educational purposes only.

Theory Behind the Framework for Planning

The Framework for Planning is grounded in core person-centered theory: people have the right to determine what they want in their life and how they want to get it.

People gain more from experience when they are empowered to take charge. This is vitally important for youth as they move from student status to adult status. Putting young people in the driver’s seat of their own future often leads to:

- Clearer sense of direction and motivation to pursue goals
- An awareness of what being self-determined means
- Greater family/social network investment and involvement
- Improved social status in the community (as college student; employee; volunteer vs. client/consumer)
- Increased competence and self-esteem
- Enhanced perception, recognition and acceptance of capacities, strengths and potential
- Strengthened skill and experience as contributing members of society
- Broader job/continuing education choices, and therefore better job/post-secondary education fit
- Better overall transition planning goals and outcomes

The Framework for Planning can be facilitated in a many ways, depending on the preferences and needs of the student. It has been used as a long term initiative with individuals experiencing significant cognitive impairment and who have severely limited life experiences. In this case, each step is facilitated via a series of activities that are designed to provide the person with opportunities and experience that lead to rich information in which to populate the template.

TIDBIT 5

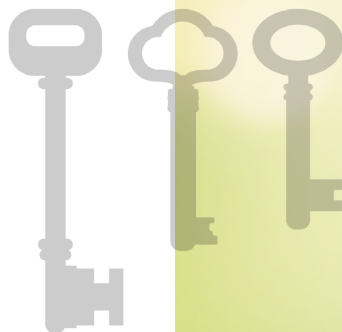


OBJECTIVES

Introduce the theory beneath the
Framework for Planning method
and tools

Provide a brief overview of each
section that comprise the Framework
for Planning process

Introduce the first of two Framework
for Planning templates





Introduction The Pocket Guides and Profile Planning Template

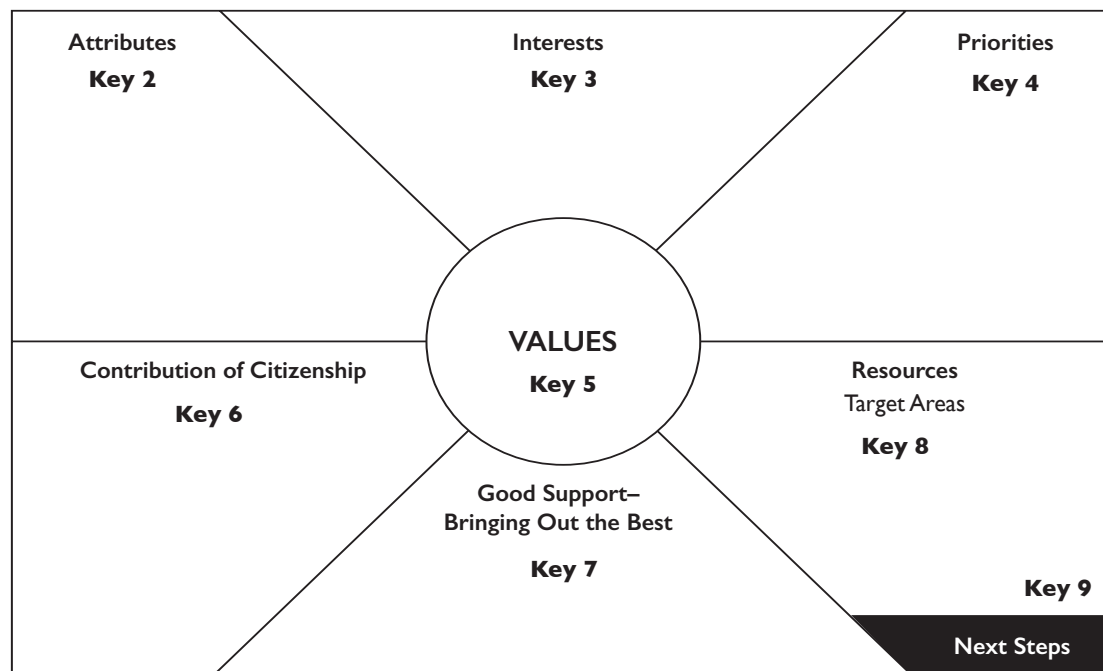
Regardless of the format that is used for facilitating the Framework, it asks planners to follow the guidelines and facilitator tips that are universal best practices for good person-centered planning. The Pocket Planning Guides #1 *Before the Planning Session* and #2 *Facilitation Roles and Responsibilities* provide a basic overview of these practices. Pocket Guides # 3 – 5 offer guidelines and sample questions for facilitating each section of the Framework Positive Profile Template and Framework Action Plan Template and a quality self-assessment guide. They can be found in the Appendix section of this field guide.

Here is the first of two templates that guide the Framework for Planning Process. Note that there are nine steps or “keys” to this template. They should be completed sequentially, beginning with Key 1. A brief description of the content that is sought to populate each section is provided on the next page. The sections fit together to define a positive profile of the person and how they are trying to move ahead in their life. Sometimes a person is clear about where he or she is headed, i.e. “to own my own hair styling salon” and sometimes a person is hoping to get a sense of direction and greater insight.

The top three sections create an insider-view of who the person is, their abilities, interests, experiences, skills, preferences and priorities relative to the purpose for engaging the process. The bottom three sections identify the connections, networks, resources and supports the person can draw on or needs to develop. It also asks planners to synthesize themes that are developing around the person’s strengths, gifts and higher life purpose and imagine valued social roles and positive contributions the person can offer to the community. This is where real energy ignites because the person and his or her planning support network can begin to “see” the person outside of the disability world.

Central to the Framework process is the exploration and discovery of “core value.” A core value is more than a person’s assets and strengths – it is about listening for high order gifts, or a calling, that emanates in and from the person. Understanding and honoring a person from this core opens a world of possibilities. It becomes a compass for guiding and taking action.

Profile Planning Template Key 1



A FRAMEWORK FOR PLANNING © Blessing and Ferrell 2012

Orientation to the Framework for Planning Tool

The Framework template is divided into nine distinct, yet interdependent sections. These sections are a combination of stand alone information (aka data) and an essential part of an integrated whole (aka comprehensive assessment).

The categories provide planners opportunity for reflection, exploration and discovery, and taking action.

They are identified by a key number to help convey the intention behind the category as well as to inform the sequence for populating the template during a planning session.

- Key 1:** **Purpose section-** sets the context for the session. It answers the question: “why are we here?”
- Key 2:** **Attributes section and Interest section** – provide a foundation for strengths, capacity and giftedness, usually described by positive adjectives. They offer a look into the person’s history, experience and areas of competence. They shape our early awareness of understanding the question “who are you?”
- Key 3:** **Interests section** – explores and surfaces hobbies, skills, talents, interests and experiences that the person enjoys or has enjoyed doing or having in their life. It helps shape understanding around the question “how do you like to spend your time? What makes time pass quickly and happily for you?”
- Key 4:** **Priorities section** – shapes our understanding of the elements that are important to attend to in meeting the demands of the Purpose in real time. It answers the question “what needs to be understood and included as we work toward our Purpose?”
- Key 5:** **Values section** – can also be thought of as “higher purpose” or “calling.” This section deepens our understanding, awareness and appreciation of the strong, positive traits and tendencies that the person was born with. This is the deeper “voice” that wants to find expression and answers the question “who are you called to be?”
- Key 6:** **Contributions section-** embraces the ideal that all people have a right to equal access to opportunities that support the productive, mutually meaningful exchange of gifts in everyday community life. This section shines the spotlight on potential and possibility by asking the question “who can you become through the expression of your “voice” and the contribution of your gifts?”
- Key 7:** **Good support** – Bringing out the Best section – explores the kind of assistance that is necessary to address the impairment(s) that potentially create obstacles to full participation in community. The question here is “how do we use our resources (time, money, imagination, talent, networks, space, etc) to maximize moving toward meeting our Purpose?” as well as, “what are the characteristics and conditions that bring out the best in this person?”
- Key 8:** **Target Areas and Resources section** – narrows the range of options that surfaced in the Contributions to the top two or three that have “gravitational pull” for the person and for the context of the Purpose that seem both positive and possible. Simultaneously it asks the question “who are the anchors, allies, associations and assistors that can help move us forward in this target area?”
- Key 9:** **Next Step section** – becomes the first steps for taking action for each of the identified target areas. “Who will do What by When?” is the core question that must be answered before the planning session comes to a close. Key 9 is represented within the second template.





Ben was a junior in high school when he participated in the Framework for Planning process. Before this Ben was unsure of a path for his future. The planning process brought everyone important in Ben's life together and allowed everyone to gain a better understanding of who Ben was from the perspective of his strengths/attributes and interests. People learned about his passion for art and his interest in getting a job at a local thrift store. They learned that he longed to live with greater independence, out of his parent's home and on his own, like others his own age. Ben graduated from high school as an employee at that thrift store; a job he kept until making the move to his new home in another county.



Here is a group of friends supporting one another during the Framework process



TAKE AWAY IDEAS:

Believe in possibilities with and about people with disabilities being full and contributing citizens in community. Trust the process. Slow down. Listen. Then listen again. Be curious. Invite stories forward that sparkle with the person's gifts and potential. Be the change.



TIDBIT 6



OBJECTIVES

Offer an effective and efficient approach to monitor progress

Introduce the 4 plus 1 questions model for keeping learning going



TIDBIT 6

Stay the Course and Keep Learning Turning.

“Ancora Imparo. I am still learning.” MICHELANGELO

Vision established? Check. Goals identified? Check. Objectives defined? Check. Action plan individualized? Check. What next? Charting progress to stay the course.

Charting progress takes discipline (do it consistently and frequently) and integrity (do it honestly). It is often a dreaded job that gets done in the eleventh hour once a year because of some accountability requirement. Progress recording is frequently an “after the fact” hindsight activity. Too often progress reports are used to point out deficiencies. Used in this manner, progress charting can be negative, problem-focused and not really very helpful.

There is an alternative.

One of the best ways to measure progress is to review it from the perspective of open-minded learning. What can be gleaned as a result of taking a particular action? Did it or is it moving toward the desired outcome? If not, change it. If so, advance it.

“To stay the course” is an idiom that means to continue to do something, even when it is difficult; to pursue a goal regardless of obstacles. Sailors at sea rely on the North Star in rough weather to keep heading in the right direction. A vision or mission statement can symbolically represent the North Star. In this paradigm, progress charting provides a proactive approach to ensuring that the action that is undertaken in the name of goals and objectives is productive and moving in the right direction.

Use a “Learning Wheel” To Keep Moving

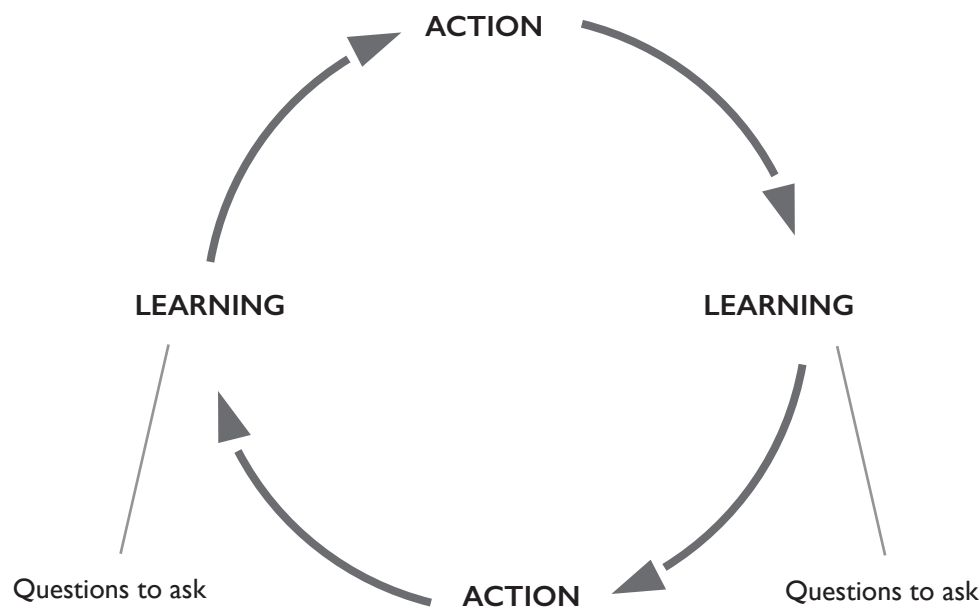
The Learning Community for Person-Centered Practice (www.learningcommunity.us) has developed a handy format for using progress charting as a tool to keep action meaningful, productive and active. They call it the 4 plus 1 Questions thinking tool. It is a sequence of questions that prompt open-minded learning. Imagine that each question is a turn of a wheel. Here is an amended version of the questions.

- What action have we taken for this step?
- What have we learned from taking this action?
- As a result of this learning, what do we want/need to try or do next?
- What is the next logical step?
- Are there challenges that are or might impede the next step?
How will they be addressed?



Ed struggled in school. He found academics “boring” and was sometimes disruptive in class. His school work lagged behind. However, Ed was active, like to be on his feet and was most agreeable if someone needed a hand. He could be very helpful. As a result of engaging in person-centered transition planning, the team learned a lot about Ed. They mostly discovered that he was motivated when helping others and he was a kinesthetic learner. Carving some of his school day to an in-school job had an impressive effect. He excelled at the work while his reputation and behavior in class improved. Although he “graduated” he decided to return this year to earn a local diploma. Incidentally, he ended up with two jobs in the community. The Framework planning process helped others to see Ed through the lens of capacity and potential. It helped them to recognize his talents and the best way to support him.

The Learning Wheel



TAKE AWAY IDEAS:

Build the learning wheel in the agenda for learning collaborative sessions. Meet frequently to share progress and to chart collective progress. Make course corrections that put the group in direct alignment with the vision. Keep coming back.





IN A NUTSHELL:

Six Steps to Building a Transition Collaborative

The Northeast Arc Collaborative for Transition Excellence boiled down three years of experience into six basic steps for setting up and implementing successful transition partnerships. The detail for each step provided in this field guide is offered as but one example for how good partnerships can lead to transition excellence. There are endless ways to establish and sustain effective and exemplary communities of practice. Hopefully this guide serves readers as a springboard to innovating transition partnerships that change the face of community, one student at a time.

Here are those six steps:

1. Create a learning community

Build on group competence to build group confidence!

2. Establish a shared vision

Ignite a passion for excellence!

3. Reach out to reach in

Bring what you have to the table!

4. Be opportunity knocking

Extend the hand of partnership!

5. Host vision-building with others

Engage others in building future that works for everyone!

6. Keep learning alive

Grow what you know!



TAKE AWAY IDEAS:

NOW is always a good time to get started. Begin.



Chris Vooy's (1977-2009)



Chris Vooy's with Little Guy

Photo used with permission, courtesy of Connie Vooy's

Chris was among the first to be involved in the 1996 demonstration project that informed the original design of the person-centered transition planning model. He had a severe reputation that labelled him a behavior problem, low functioning, and dangerous. In addition, Chris had Down's syndrome, a hearing impairment and limited verbal communication. The goal for his IEP identified a day treatment program for individuals with significant intellectual and cognitive disabilities. He spent school days in a contained classroom, identified as the least restricted environment most appropriate

for meeting his significant support needs. Chris never had this story inside his head about himself. Ever.

Over the course of two years the teacher in Chris got noticed. He gave life lessons on why and how to apply the principles of positive behavioral support; how to become proficient in understanding and using diverse forms of communication; provided coaching around how to truly respect what 'no' meant to him so that his 'yes' came with whole-hearted commitment; he shed light that would serve to challenge and change assumptions about how service and supports should look and blazed a trail for using a braided approach to fund a rich and full life. He taught how to share old resources and how to invent new ones. Chris was powerfully gifted. The Gift of Welcome, Hospitality and Service; the Gift of Compassion and Forgiveness; the Gift of Humor and Spirit and the Gift of Leadership.

Chris was a young man with deep passion. He was passionate about God and church and choir song; family, extended family and friends; welcoming people into his home; riding horses and lifting weights with the guys at the gym. He was passionate about keeping promises and honest to goodness...Reese's peanut butter cups.

When Chris transitioned from school to adult life, he left with two years of community-based experiences and connections: two part-time jobs (one was as assistant deacon at his church!); membership in clubs and groups in the community (horseback riding; Cutting Edge Sport Science; as a volunteer at his church, a choir member, and more). More importantly, Chris left school as a respected citizen, known and loved for his many gifts. Throughout his entire life, THIS is the only story that Chris heard inside his own head. He would let us settle for nothing less. We are all better because of it. Yes.Yes, indeed.



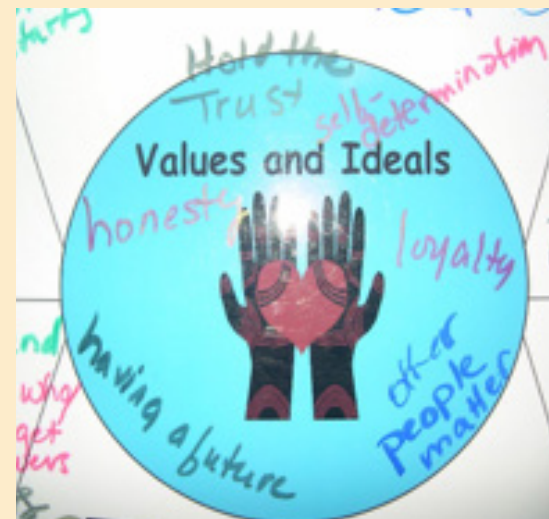
Chris (2002) and his power lifting coach, Dyke

Used with permission



APPENDICES

- I Framework for Transformation
Collaboration Profile template
- II Transformation Collaborative Profile–
Action Plan template
- III Charting Progress template
- IV Framework for Planning Toolkit
 - a. Framework for Planning Templates
 - b. Key Exercises
 - c. Framework for Planning- Planning Guides





APPENDIX 3

Charting Progress

Today’s Date:

What objective is being reviewed?

What associated action step is being reviewed?

Date of last action plan for this objective:

- 1. What action has been taken for this step?
- 2. What has been learned as a result of taking this action?
- 3. Because of this learning, what needs to happen next?
- 4. What is the next logical step?
- 5. What questions need to be answered/issues addressed in order to take this step?

How will they be addressed?

APPENDIX 4

Framework for Planning Toolkit

“I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail.” **ABRAHAM MASLOW**

The templates and activities provided in this resource were developed by the Blessing Consulting Group and are used with permission for inclusion in this field guide. The Framework for Planning protocol is described in a series of Pocket Guides, found at the end of the toolkit, should be used in the preparation and facilitation of the Framework for Planning Process.

A full overview of the Framework for Planning process appears earlier in this guide in the Tidbit #5 section. Please become familiar with the contents of the section as this will be useful in ensuring a positive experience with planners.

The format for the toolkit provides a section-by-section explanation of the intention for each distinct area and offers suggestions for engaging in their completion. It should in no way be considered a prescription for completing the Framework, rather a springboard for inspiring new ways for listening, exploration and discovery with people. Keep in mind that the ultimate purpose for using any person-centered planning tool is to understand the gifts, capacities, strengths, and potential that a person has to offer and contribute in community through valued social roles and citizenship.

Too often the type of planning that happens with people is derived from a standardized assessment that results in a checklist of needs. From here “goals” for that person are developed and objectives defined. Most objectives that form the plan around people with disabilities tend to be based on what others think the individual needs to know or do. They have answers to the problem. They are problem-centered plans, not person-centered plans.

The Framework for Planning is an invitation to embrace planning through the art of dynamic conversation: story-telling, art, creative curiosity, appreciative inquiry – any means through which the individual at the center of the planning becomes understood and known by others in positive and meaningful ways. Inquiry born of curiosity asks questions to which the answer is not already known. It is about building a relationship that is empowering to the other person. This takes authentic intention which, in turn, takes courage. Edgar Schein, in his marvelous book *Humble Inquiry* the gentle art of asking instead of telling (2013), says this:

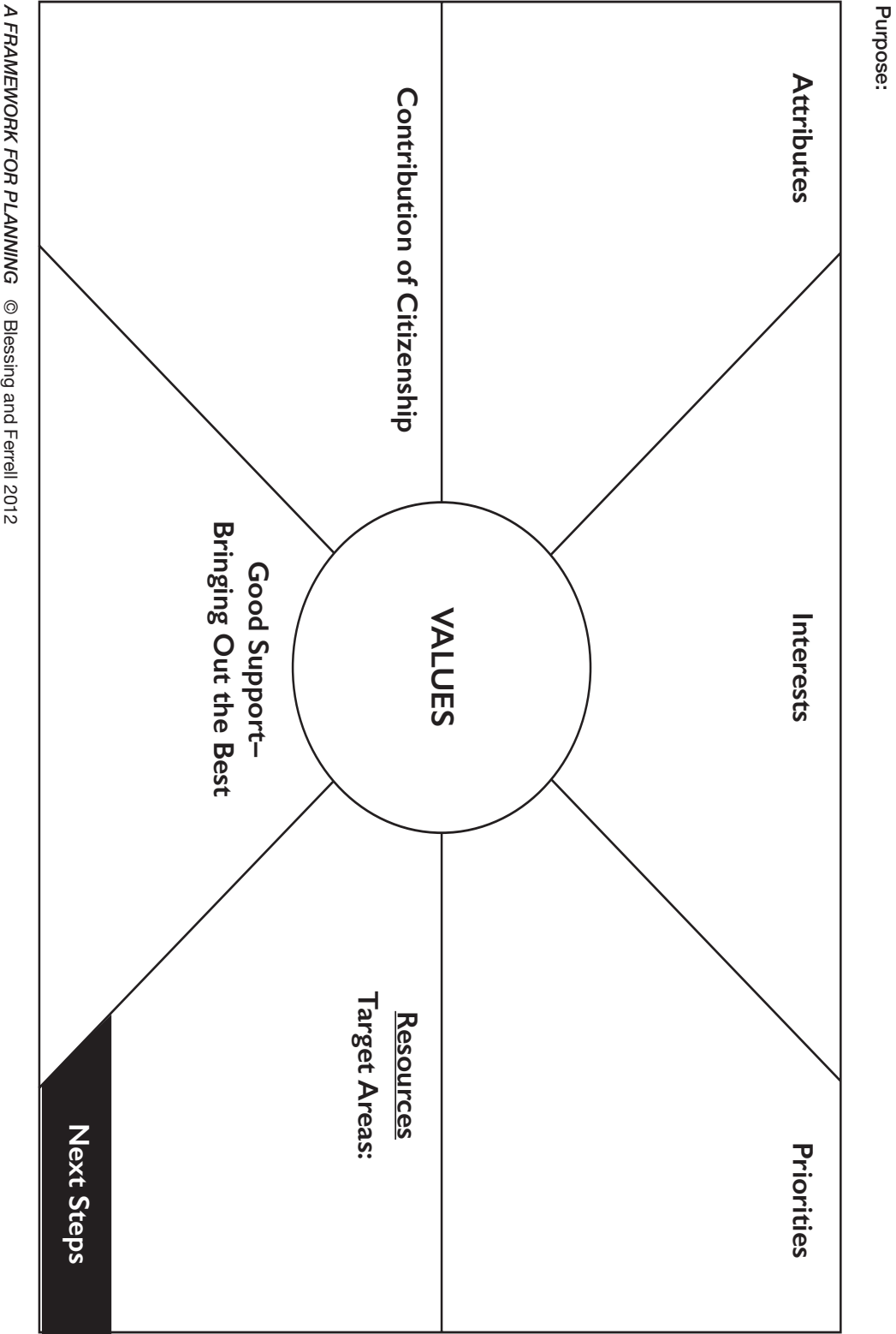
“Things and people are what we call them, because in the simplest terms, we are what we say, and others are what we say about them.”

When people are supported toward exploring, discovering and offering their gifts and potential, they are invited to express their purpose in life– maybe a calling to higher purpose. This is what true person-centered planning has ever been about. The Framework for Planning toolkit offers an opportunity to begin to imagine possibilities in the lives of people with disabilities that shift the social perception and the social status of people with disabilities forever.



APPENDIX 4a

Framework for Planning Templates



| Target Connection Area | First/Next Steps | How | Who | When |
|------------------------------|------------------|-----|-----|------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |



APPENDIX 4b

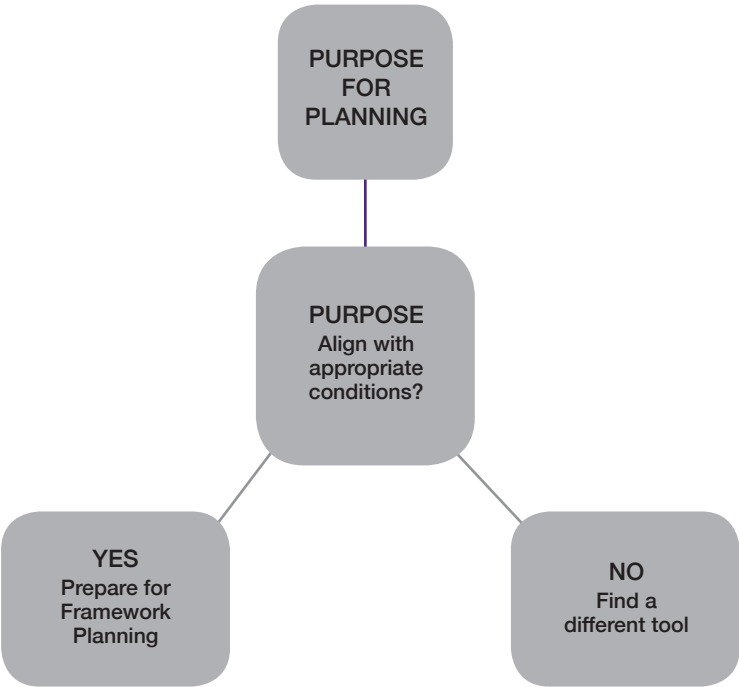
Exercises

KEY 1: PURPOSE

There must be a reason to get involved in any person-centered planning process. Once the reason for planning is established, it is easier to select the best tool for getting the job done. Not all person-centered planning tools work for every situation. It is important to know a variety of tools and approaches so that planning can be customized to the person, not the other way around. As with any person-centered tool, the purpose must be positive and possible.

The Framework for Planning is a good choice when any of the following reasons for planning are identified:

- To find direction for the future
- To develop a positive profile
- To identify themes that point to a calling or purpose in life
- To prioritize planning and action around the specific purpose statement
- To create a list of opportunities for connecting to community
- To brainstorm ideas for contribution to community:
 - › Paid employment
 - › Unpaid employment (volunteering)
 - › Membership in groups/clubs



KEY 2: ATTRIBUTES

An attribute is a characteristic or a quality given to a person. In this case, the focus is on discovering the positive attributes that people who are knowledgeable about the Framework planner (focus person) ascribe to the planner based on their observation and experience. These can be explored through a wide variety of activities. Do not be limited by the few examples here.

SUGGESTED ACTIVITY: *Popcorn Attributes*

This activity is done with a group of people who know the focus person. The focus person has been prepped in advance about this exercise and has agreed to it. The facilitator begins by reminding the group:

- that they are here because they have agreed to help (focus person) identify the important positive qualities he or she brings to the world
- the information must be true, based upon their observation/experience

The facilitator asks the group to think about (focus person) and recall a particular story about (focus person) that stands out in their mind. While remembering that story, notice the qualities, traits or characteristics that (focus person) brought to life in the story that made it memorable. What were they? After about a minute the facilitator then asks the group to share a one or two word positive adjective out loud and records these words on the Framework template.

Like popping corn, the group will likely start out slowly with a few words. Then as the activity heats up the words will start to come faster, as people build off each other's contribution. There will be a high point where keeping up with recording the words fast enough will be a challenge. This is great! Then, just as it started, the energy of the activity will begin to ebb, and the words will slow down. This is the time that the facilitator will transition to the next section of the template, reminding the group that the section can be added to at any point along the process.

SUGGESTED ACTIVITY: *Fill In the Blank*

The facilitator provides participants with a short page of fill in the blank statements and gives them five minutes to think about and write responses for each of them. Participants then take turns sharing their responses while the facilitator records them on the Framework template. Repetition in words is absolutely fine since this indicates a strong trait. **Note: this activity can also be conducted via distance (telephone interview, email, mail) for those who are not able to be in the planning session.**

I can depend on (focus person) to always _____

My favorite quality about (focus person) is his/her ability to _____

My top three words that I believe describe (focus person) really well are _____, _____, and _____

I am impressed by (focus person)'s unique ability to _____

What I like/admire most about (focus person) is _____



KEY 3: INTERESTS

Interests are those things which hold a person’s attention. A person does not have to have a natural talent for things in which they are interested. For example, they may love to dance but are not particularly good at it. It doesn’t matter. What matters is that there is a draw to dancing and so dancing would be identified as an interest.

When helping the planner to identify his or her interests it is useful to try to be as specific as possible. For example someone may say that they have an interest in music. This is good, but better would be to know what kind of music, the role music plays in the course of a day in the person’s life, etc. Often, clear information about interests give insight into additional attributes, characteristics and traits.

When facilitating the Framework with a group of supporters, it is helpful to gather input from them regarding what they notice that the focus person prefers to spend time doing, since they may recognize interests that the focus person doesn’t or can’t identify for themselves.

SUGGESTED ACTIVITY: *Show and Tell*

This activity is done outside of a group. It is a relationship building activity between the facilitator and the focus person. The information that the facilitator gathers from the activity, however, may be used when populating this key section on the Framework template either during or in advance of the Framework planning session.

The facilitator and the Framework planner (focus person) each agree to bring in one to three items from home which represents areas of interest. They show the items and share what they like about them.

The facilitator should use this as an opportunity to practice good listening techniques to catch “nuggets” of information that allow for deeper exploration; insights and finding mutual or common ground.

SUGGESTED ACTIVITY: *What If...?*

The facilitator uses a series of open-ended questions to invite the Framework planner (focus person) to day dream a bit about an imaginable future.

What if...

....you could write a book about anything that you wanted.
What would you write about?
What would the title of the book be?

....you could spend one whole day doing anything that you wanted to do, what would you do?
Who would you want to do it with?

....you could go on the best trip ever. Where would you go? Why?

....you could have any job in the world. What would it be? Why?

KEY 4: PRIORITIES

Priorities in the Framework for Planning process are in direct relationship to the context set by Key 1: Purpose. For example, the focus person indicated that their purpose for engaging in the process is to find direction for a job when they get out of school. What are the immediate priorities for finding direction RIGHT NOW that are important to the planner? The more specific this is, the better.



Angela, a student getting ready to leave school, identified finding a job as the purpose for planning. Her support network saw her on a career pathway leading to working with little children in a school system. Angela was interested in one day finding work in this profession. However, when the priorities section was facilitated, it became apparent that Angela needed a part-time job working evenings and weekends and that paid at or above minimum wage. And she needed it NOW in order to support her single mom in keeping food on the table and the electricity on.

Should Angela abandoned her dream to one day work with kids? Absolutely not. Her priorities, however, superseded her wish. Good Framework planners will ensure that preferences around the priority are understood as well. While Angela needed a job now, her preference was to meet her priorities by working in a job that put her near if not in the ballpark of working with kids later on down the road. Take caution: this section is not intended for others to decide what the focus person’s priorities ought to be.

SUGGESTED ACTIVITY: *(Focus Person)’s Top Three List*

Facilitator works with the Framework planner (focus person) to define the three, five or ten things that are MOST important to them in the context of the Framework purpose.

Ian, 18 years old, was getting ready to leave prison after a five year term. He identified his purpose as being able to find direction for going back to the community and being productive. Among his top three, he identified his priority around this as “learning how to make friends.” Ian had always been shy, insecure and did what others told him to do. He felt that he needed to build awareness and skill on how to build real relationships with people who could become true friends.

(Focus Person)’s Top 3 List of Importance:

- 1. Most important to me about (purpose) right now
- 2. Really important to me about (purpose) right now
- 3. Pretty important to me about (purpose) right now





KEY 5: VALUES

The Values key sets the Framework apart from other person-centered planning tools in that it is intentionally focused on noticing the positive themes that are emerging from completing the other sections. These themes can be considered innate high order gifts that the person is born with. Pulling together threads from the stories that have been told about the focus person during the planning session weaves a sense of purpose that the person has. For example, someone whose stories carry the thread of concern for others, being helpful and caring may hint at the Gift of Compassion as a core value the person operates from.

Core values are constants in a person’s life. They will always find a way forward, even in the worst of conditions or situations. Think of Nelson Mandela sitting in a prison for decades in cruel, unthinkable conditions. Yet his Gift of Compassion and his Gift of Forgiveness never ceased to serve him and inspire others.

Take care when completing this section of the Framework. Quite frequently well-intended supporters will try to overlay their own values or super-impose the values that they believe should fill the center of the template. “Family” will often be a default value that people will want to insert in the circle. While family may very well be a value to the person, it likely will not be their calling to higher purpose. The Gift of Nurturing however, may well be.

SUGGESTED ACTIVITY: Common Threads

| |
|--------------------|
| helping |
| concern for others |
| patience |

The facilitator asks the planning group and focus person to look at the Framework template as it has been completed to this point, and to notice any patterns, themes and/or relationships between sections and to share these with the group.

The facilitator charts these observations on a separate wall chart – perhaps drawn with individual blank squares to resemble a quilt. As the “quilt” gets filled in, the facilitator assists the group in pulling common threads or themes. When a few solid themes emerge, the facilitator will test their validity by reframing the themes in statements that the focus person (and secondarily, the supporters) agrees or rejects as feeling true to them.



Jen was convinced that she had no values or ideals about the world. She simply could not come up with anything that she felt she “stood for” when she was asked. The facilitator asked her then when thinking about things that happen in the outside world what made her boiling mad – so mad she wanted to scream – she answered: “when people are mean for no good reason.” Digging deeper into this, Jen revealed a strong value of social justice and fair treatment.

KEY 6: CONTRIBUTIONS

Contribution is what happens when gifts are given in places where they are welcomed, appreciated and the possibility for reciprocation arises. This key is interested in looking for the connections that can be made between the gifts that the person has to offer and the communities in which they can be well received.

SUGGESTED ACTIVITY: Community Connections

Synthesize prevalent themes, gifts, attributes of the Framework planning in the center circle. Identify 6 – 10 or more common places known by planners in the community around where the focus person lives. Brainstorm at least 5 valued roles (consumer or client is not an option) that utilize the person’s strengths and gifts that people can “see” the person engaging in within each of the community places. Have the focus person circle all of the ideas that are interesting to them. List these on the Framework template.

When possible, use real names of real places within the community. For example, instead of “hospitals” use “Samaritan Hospital.” This will make planning the action around this later much easier.

This key, again in the context of the purpose for planning, begins to sharpen the focus for moving from planning to action. When this step is completed, planners should have a much better idea for where they are headed and what it will take to move forward. The next three keys are designed to organize thinking and planning for doing this.





KEY 7: GOOD SUPPORT

The key to good support is finding the right combination between the supporter and the supported. This should be a mutual agreement that is put within the context of moving toward the ideas that emerged during the Key 6 activity. This should never be used as a continuum for taking action, i.e. “before you can move into a role in the community you must first be able to prove your ability to shower and wear clean clothes every day.” The question that is on the table for this key is “what assistance will be needed to support the impact of this person’s disability while promoting access and opportunities for the giving of their gifts? Fill this information in on the Framework template.

SUGGESTED ACTIVITY: *Bring out Your Best*

The facilitator asks the focus person and the planning team to list the kind of support that brings out the best in the person across three distinct areas:

Characteristics of people in support roles

MUST HAVE or BE

SHOULD HAVE

WOULD BE NICE, BUT NOT NECESSARY

Learning style

MUST HAVE or BE

SHOULD HAVE

WOULD BE NICE, BUT NOT NECESSARY

Type of assistance preferred and/or required to ensure safety

MUST HAVE or BE

SHOULD HAVE

WOULD BE NICE, BUT NOT NECESSARY

KEY 8: TARGET AREAS AND RESOURCES

This key further refines the focus for taking action by asking the Framework planner (focus person) to pick the top five ideas that they circled in Key 7 and put them in priority order. The facilitator lists the top five roles on the Framework template using the following scheme (or something comparable), completing the “Top Priority Role” section first; the “Where in Community” area next and finally the “Who Do We Know” section.

The object of this activity is for the focus person to bring targeted focus for serving the purpose for engaging in the process. The first priority role should be the one that holds the most interest or excitement with the person, and so on.

Once the priority list is established the facilitator may want to have the group brainstorm additional places in the community in which the role makes sense, would be an asset and/or a natural part of a given environment. This area could and should have several possible places that would support the role.

The last step for this section is to pull from the group’s current network resource the names of people who are either directly or indirectly connected to the list of community places. Who knows somebody who knows somebody...?

| TOP PRIORITY ROLE? | WHERE IN THE COMMUNITY? | WHO DO WE KNOW? |
|--------------------|-------------------------|-----------------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |



KEY 9: NEXT STEP

The last step of the Framework for Planning process is the first step in taking action.
The facilitator and planners should move directly to the Framework for Action Planning template:

| | | | | |
|--|--|--|--|------------------------------|
| | | | | Target Connection Area |
| | | | | First/Next Steps |
| | | | | How |
| | | | | Who |
| | | | | When |

Put the date the action plan was completed on the template and schedule a follow up session to turn the learning wheel!

APPENDIX 4c

Framework for Planning – Planning Guide Excerpts

GUIDE 1: BEFORE THE PLANNING SESSION

To truly be of service to a person one must be willing to slow down long enough to fully understand what is being sought. This requires a commitment to sit long enough with someone to begin to forge a relationship that harbors trust, partnership, authenticity and a spirit of reciprocity. It is about striving to be of genuine service. A Framework for Planning provides a structure in which to work towards this end.

BEFORE THE PLANNING SESSION

Orient the person to the Framework for Planning Process:

- Explain what the Framework for Planning is designed to do
- Explain each of the different areas of the Framework for Planning
- Describe how the process is conducted
- Introduce the Framework for Planning Workbook
- Describe how the information from the workbook can be used in the planning session
- Describe how the information from the planning session will be used
- Determine that the person fully understands the process
- Determine the person’s consent to participate

ESTABLISH A TEAM

Develop a Planning Team:

- Identify any family members that the person would like to invite to participate in the planning session
- Identify any friends and associates that the person would like to have participate in the planning session
- Identify paid personnel that the person would like to have participate in the planning session
- Identify paid personnel that are required to have or provide information relevant to the planning session
- Establish a method or methods for orienting team members to the Framework for Planning process
- Obtain information from members who are not able to be present at the planning session
- Decide how to best integrate information from absent members into the planning process



PREPARING FOR THE PLANNING SESSION

- Identify potential Framework planners/participants
- Support the person in completing the Framework for Planning workbook as necessary
- Review the completed workbook prior the session (with permission)
- Conduct any preparatory interviews with participants who cannot attend session
- Prepare to integrate information from absent members during session
- Select and secure a site to hold the planning session
- Schedule a minimum of 2 hours to conduct session
- Identify and confirm process facilitator and process recorder for the session
- Develop and disseminate session invitation and agenda to all members
- Insure that invited members fully understand and agree to support active positive participation throughout session
- Arrange any necessary staff coverage to insure uninterrupted member participation
- Negotiate room set up, break schedule, flow of the session with the focus person
- Introduce focus person to facilitators (if necessary)
- Gather Framework for Planning Templates, tape, markers, etc.
- Develop a list of Group Agreements/Ground Rules with the focus person

GUIDE 2: FACILITATION ROLES AND RESPONSIBILITIES

A successful planning session relies upon attention paid to important details that help to set the stage for conducting the actual mapping process. Attention to orienting the focus person and any potential participants to the function of the process and what to expect during and after the process are critical to gaining understanding of and support for the work.

FACILITATING THE PLANNING SESSION

Preparation for the Planning Session- Facilitators and Focus Person:

- Arrange to have a digital photograph taken of the completed Framework for Planning templates or arrange to have a copy transcribed onto portable templates
- Arrive early enough to arrange the room so that all participants can be comfortable and have an unobstructed view of the templates
- Set up the Framework for Planning templates
- Post the Group Agreements/Ground rules
- Confirm that the focus person still wants to proceed with the process
- Welcome participants as they arrive
- Orient participants to the session agenda and time frame
Review Group Agreements/Ground Rules, insert additional norms as provided by the group
- Orient participants to each role: process facilitator role; process recorder role; role of the focus person and participant’s role
- Facilitate introductions; answer any questions
- Explain role of the workbook and how it may be used during the session
- Maintain primary positive focus on the person
- Begin facilitating the Framework for Planning conversation starting with either the Attributes and Talents section; the Values and Ideals section or the Interests, Experience, Skills and Hobbies section of the map, depending on the person’s preference and comfort level

- Invite comments, stories, reflections that relate to the mapping sections to obtain insights, critical information and to solicit involvement from participants
- Establish a purpose for convening the Framework for Planning session
- Openly share thoughts, ideas, interests, and aspirations throughout the process
- Follow through on any agreements or commitments

FOCUS PERSON ROLE

- Establish a purpose for convening the Framework for Planning session
- Identify potential Framework planners/participants
- Complete the Framework for Planning workbook
- Openly share thoughts, ideas, interests, and aspirations throughout the process
- Lead the planning session with the facilitators as much as possible
- Follow through on any agreements or commitments

PROCESS FACILITATOR ROLE

- Establish a purpose for conducting the planning session with the focus person
- Maintain positive, respectful focus on the person
- Take cues from focus person regarding pace of the conversation, content of the discussion, need for moving on or digging deeper, need for breaks
- Insure balance of contribution from all participants
- Facilitate dialogue using open-ended questions in the spirit of appreciation, inquiry and discovery
- Return to the purpose from time to time to frame/guide the discussion
- Ensure a safe, comfortable environment for all of the participants
- Assist the group to successfully navigate the process to completion, including action planning
- Support the process recorder to obtain accurate information

PROCESS RECORDER ROLE

- Use the Framework for Planning templates to record information across distinct Framework categories and in the Action Plan
- Record information in whole ideas and thoughts, rather than paragraphs or complete sentences
- Use graphics, symbols and color whenever possible to convey mood or feeling
- Move across template areas based upon the flow of the discussion
- Clarify accuracy of record with the focus person and with participants
- Slow the pace of the discussion down if it becomes confusing for the recorder, participant, focus person or facilitator
- Summarize information that is recorded at various intervals throughout the process
- Support the process facilitator role



PARTICIPANT ROLE

- Show up to the session on time and prepared
- Participate in the development of a positive profile of the focus person
- Respect the leadership of the focus person
- Follow group agreements/ground rules
- Provide meaningful and relevant contributions throughout the process
- Follow through on any agreements, commitments and action steps

GUIDE 3: GUIDELINES AND SAMPLE QUESTIONS

A sample set of questions for each section of the Framework for Planning has been developed as a resource to help facilitators begin the dialogue with the Framework planners. Facilitators are not required to use the sample questions to complete the mapping process. However, facilitators are asked to respect the guidelines that are associated with the Framework for Planning sample questions.

GUIDELINES FOR USING SAMPLE QUESTIONS

Facilitator and Planner Guidelines:

- The questions are to be used merely as guideposts for discovering important information about the person
- The questions are not required, nor do they appear in any particular order
- The questions are used as a springboard for listening to the person and discovering new questions based upon what is being heard
- Questions should always be conveyed with respect for the person
- The person always has the right to decide what questions to answer
- Questions are to be asked in open-ended style
- Questions are asked in the spirit of discovery and seen through the lens of capacity
- Responses to questions must reflect the speaker’s intent rather than the listener’s translation

SAMPLE QUESTIONS: ESTABLISHING PURPOSE

- What do you hope results from your participation in the Framework for Planning Process?
- What is your interest in going through this process today?
- What do you hope to learn about yourself through the Framework for Planning?
- Why did you agree to participate in the Framework for Planning Process?
- What do think the people who are here with you today might be able to help you to do?

SAMPLE QUESTIONS: ATTRIBUTES and TALENTS

For the focus person:

- What kinds of things do you know that you are really good at doing?
- What kinds of activities hold your attention the longest?
- What would you, or others say, that you are handy at doing?
- What would you be proud to have people know about you?

For the participants:

- Give one or two adjectives that you think describes something really positive about this person
- When you think of this person, what positive images surface in your mind?
- What makes this person unique in a good way?
- What would you say people appreciate most about being around this person?

SAMPLE QUESTIONS: VALUES and IDEALS

For the focus person:

- What do you think is the most important thing a person should do in their life?
- What is your rule for life?
- What is the most important thing in the world to you?
- What do you think would make the world a better place?

For the participants:

- What do you admire most about this person?
- What is a consistent trait that you see in this person?
- What makes you stop and take notice about this person?
- What do you believe this person might “stand for” in life?

SAMPLE QUESTIONS: INTERESTS, EXPERIENCE, SKILLS and HOBBIES

For the focus person:

- When you are done doing what you are responsible for doing, like work, how do you like to spend your time?
- Where do you like to spend your time best?
- What do you like to do so much that it makes you feel happy or at peace?
- What do you know that you are good at doing?

For the participants:

- Where can you see this person really thriving?
- What recommendations would you feel comfortable making based on what you know about this person’s skills and interests?
- What have you noticed that this person might be drawn to by way of hobbies?
- What experience does this person bring that can be built upon?



SAMPLE QUESTIONS: PREFERENCES and PRIORITIES

For the focus person:

- If you could only deal with one or two goals to focus on today, what would you pick as being most important?
- What would you say is most important to making happen in your life right now?
- Are there ideas or goals that you haven’t had time or the chance to focus on yet that you wish you could?
- What matters most to you: being around people, going places or having things in your life?

For the participants:

- What would you say must be a point of focus with this person in order for them to be successful?
- What recommendations would you make that might have a positive impact on this person’s quality of life?
- What do you wish for this person?
- What do you believe needs to be in place in order for this person to have a balance between what would be nice and what is necessary?

SAMPLE QUESTIONS: CONTRIBUTION OF CITIZEN

For the focus person:

- What kind of places do you enjoy spending time in?
- If you were going to be paid to do some work, what kind of work would you like to be doing?
- Do you prefer to do things that let you sit or stand?
Be inside or out doors? Be with people or be alone?
- What would be the best place you can imagine going to on a regular basis?

For the participant:

- What kind of places can you see this person fitting in?
- What interests are supported by places in typical community settings?
- What places might appreciate the talent and skill this person has to offer?
- What kinds of environments would be glad to have this person there because of the value-added impact of their involvement?
- What role do you see this person assuming?

SAMPLE QUESTIONS: RESOURCES and NETWORKS

For the focus person:

- Do you hold any certificates from school or other programs?
- Are you a member of any groups or organizations?
- Do you have a trade?
- Who do you have to help you out in the community?

For the participants:

- What marketable skills do you think this person has?
- What does this person already have in the “plus” column?
- What assets does the person bring to the table?
- Are there associations or resources that you know this person is or might easily become connected with?

SAMPLE QUESTIONS: GOOD SUPPORT

For the focus person:

- What does good help look like to you?
- What kinds of people do you hate being around?
- What does “respect” mean to you? How do you know when people are respecting you?
- If you were able to put together the best characteristics of a person, what would you pick?

For the participants:

- What do you think contributes to this person having more good days than bad?
- What do you notice brings out the best in this person?
- What would you recommend as critical for a new person entering a support role to know about what good support would look like?
- How does this person approach problem-solving?

SAMPLE QUESTIONS: ACTION PLANNING

For the focus person:

- Of the things we talked about in the planning process, what was your favorite?
- What is the first thing you would like to focus on when this planning session is over?
- What would you say you have to take care of in order to move toward the goals that came up in the planning session?
- What information or help do you think you need right now to start moving forward?

For the participants:

- What “themes” emerged about this person that really helped to direct us toward some next steps?
- Who else might need to be involved that could help this person move forward?
- What information or resources might we need to obtain that would help this person move to the next step?
- What places or people in typical community settings might welcome what this person has to offer and might even be willing to help in some way?

What is the very first step that must be taken? By who? By when? How will we know when it has happened? What will happen next?



GUIDE 4: FROM PLANNING TO ACTION

The Framework for Planning process includes completing two templates. The initial template is the Framework for Planning map upon which a positive profile is developed, self-defining themes are identified, and a sense of direction toward a specific purpose is indicated. This information is only useful if there is a commitment to do something with what has been discovered. Consequently, the second template in the Framework for Planning process is the Action Planning template.

Facilitators should allot a minimum of 45 minutes to one hour of the planning process to devote to this step. Without it, even the best facilitated map will be just wishful thinking.

FROM PLANNING TO ACTION

Following the completion of the initial Framework template:

- Review the themes that surfaced during the process.
What are the obvious “draws” for this person?
- Identify the priority areas of interest
- Brainstorm places in typical community that may support or welcome this interest
- Identify potential membership roles that can be fulfilled by expressing this interest
- Rank order the list based on the person’s strongest to least preference
- Identify specific action steps for the prioritized areas: what is the first thing that must happen to move forward
- Identify who will help take the first steps
- Identify the time frame in which the initial steps will be completed
- Schedule a follow up meeting to review progress toward each action area. Use the following questions to gather information, assess progress and direct the next series of steps:
 - For this goal, what have we tried?
 - Given what we have tried, what have we learned?
 - Based on what we have learned, what do we need to try/do next?
 - For this goal area then, what is the next step?
- Schedule next meeting to review progress and revise the action plan

GUIDE 5: QUALITY SELF-ASSESSMENT

The Framework for Planning process is intended to provide people with a vehicle for engaging in rich discussion that surfaces important information about things that really matter in the life of a person. Planning for the sake of planning is often an exercise in futility that leaves the person for whom planning was intended worse off than before. There must always be a reason for engaging in the work, a purpose that brings meaning to the effort before, during and after the session.

Traditional approaches lead to traditional results. The protocol for completing this person-centered process has been established to ensure that steps are taken to avoid falling into typical patterns of planning with people. There is always a danger, however, that people will adopt a new way of doing old business, resulting in the “same soup in a different cup” syndrome.

Sincere attempt should be made to honor the process as close to the original intent as possible. To this end, the following questions can help planners determine if they have kept to the path or might in any way have compromised the process. For any question to which the answer is “no,” planners should think about what they need to include for the next time.

CHECKING OUR WORK

During the facilitation of the Framework for Planning Process:

- Did the purpose for conducting the mapping session get stated clearly?
- Did the stated purpose serve as the basis for the facilitated discussion and subsequent action planning?
- Did the process yield a positive profile of the person?
- Did the process include a process facilitator and a process recorder?
- Were the roles of participants clearly explained?
- Did the team of participants include the person’s family, friends or people who have not been previously been part of the core team?
- Did the focus person fully understand the role that they held in the process?
- Did the participant group include people outside of paid support that know and care about the focus person?
- Was the information in the mapping session consistent with information that emerged in the workbook?
- Were symbols and other graphics used to represent ideas, mood, emotions, or to add emphasis?
- Did the mapping session point to clear, concrete directions based on the stated purpose for conducting the process?

OUTCOMES

Following the Framework for Planning Session

- Do we now better understand the interests and quality of life conditions of the focus person?
- Did we discover new information about the person’s ability to make positive contributions to the world?
- Were we able to make connections between the desired future the person holds and what we might do to facilitate movement towards that future within our existing system?
- Did the process result in anything different to occur in the life of the person?
- Do we know how to maximize the existing system in order to best support the person?
- Were connections to natural community supports identified that might help to reinforce and/or developed valued community membership roles?
- Did the planning process focus the core team toward the specific work that is needed in order to improve the likelihood for success?
- Is there a clear balance between what the person wants and what the person needs in order to make progress?
- Did the mapping session result in a solid plan for action?
- Is the person happy with the planning experience?



PROCESS EVALUATION and FEEDBACK

Following the Framework for Planning Session

- Briefly summarize key points and moments from the process.
- Review the steps identified in the action plan, making sure that there are point people and cor-related time frames assigned to each step.
- Before the group dissipates following the session, take a few moments to check in with them informally to solicit feedback about their experience with the Framework for Planning process:
 - Did the session run smoothly?
 - Did participants feel welcomed?
 - Did everyone have the opportunity to contribute?
 - Did their input feel valued and appreciated?
 - What was the best part about experiencing the process?
 - How are they feeling about the future with/for the focus person?
- Conduct an informal feedback session with the focus person and ask:
 - Did the session go as expected?
 - Is the person satisfied with the results?
 - How are they feeling about the process at the moment?
 - Were there any surprises?
 - What was the best part of the experiencing the process?
 - Does the person have any concerns or questions?

Make arrangements to have the information from the templates integrated into a portable document and provide copies to participants.

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Contact: carolblessing@me.com or cferrell_connie@yahoo.com

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GO TO SOURCE:

The kind folks in the *Northeast Arc Collaboration for Transition Excellence* are glad to answer any questions about the work that they are doing:

| | |
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REAL GOOD RESOURCES

The **Person-Centered Planning Education Site** provides a self-directed overview of person-centered planning theory and popular planning tools. It offers built-in activities, quizzes, recommended reading and resources to encourage users to explore the topic more thoroughly.

www.personcenteredplanning.org

The **Citizen-Centered Leadership Resource and Learning Center** is the portal to an international learning community comprised of people who wish to take person-centered theory and practice to a deeply personal and intentional level. The 15 week on-line course and weekly live webinar sessions challenge participants to stand in the “integrity gap” – the space between what we say we want to do and what we actually act on - with people with disability to create a culture of empowerment. See how 15 weeks and you can change the world!

www.cclds.org

The **Individuals with Disabilities Education Improvement Act (IDEA 04)** requires transition planning for all students aged 16 and older who are enrolled in special education who have an Individualized Education Program (IEP). A transition plan is a section of the IEP that identifies the student’s life goals for adulthood and outlines objectives that need to be accomplished during the school year to assist the student in moving successfully forward in meeting these goals.

- The term “transition services” means a coordinated set of activities for a child 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 child with a disability to facilitate the child’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 child’s needs, taking into account the child’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) **<http://idea.ed.gov>**