Transition Coalition Self-Study:
Nuts & Bolts of This Effective Practice for Building Practitioner Knowledge and Collaboration at the Local Level

Mary Morningstar    Dana Lattin    Beth Romans
Learning Objectives

• Participants will:
  – Gain understanding of the transition self-study process
  – Identify rationale for allocating time to participate in a team based comprehensive transition training
  – Describe the activities self-study participants engage in on their own and with the team
  – Explain how the Indicator 13 Checklist can be used to guide and evaluate implementation of required transition components
  – List three possible positive outcomes for district or school team participating in a Transition Coalition self-study professional development process

• What are you hoping to learn from this presentation?
What PD Often Looks Like
How Can PD Look More Like THIS?
Elements of Effective PD

- Relevant Content
- Active Learning
- Team-Based
- Feedback & Reflection
- Coaching & Support

Sustained Duration

Morningstar, Clark & Holzberg, 2017; Darling-Hammond, Hyler & Gardner, 2017
Transition Coalition Self-Study

Team-focused
- 4-12 team members; 1 Facilitator
- Learn independently & together
- Apply to team process & materials
- Doable change & useable products

Multiple Units
- IDEA & Secondary Transition
- Transition Assessment Toolkit
- Self-Determination

Support for Facilitators
- TC Coaches
- Online Community/Discussion
- Email/phone calls
- Video presentations/tutorials

What we accomplished has changed our way of thinking and provided us with a new way of approaching the development of transition plans. ~ District Special Educator
Self-Study Process

**Weeks 1-6**
- **Applied** learning & identify gaps
- **Learn & Reflect** on content & practices
- **Collect & Reflect** on team data
- Prioritize & Plan

**Weeks 7-12**
- Make *do-able change*
- Implement *team* action plan
- Team accountability
- Team *problem-solving*
- Ongoing *support & resources*

"To know and not to do is not yet to know."
- Zen Wisdom
**Sample Timeline**

- Facilitator Preparation
- Team
- On Your Own

### At-a-Glance Timeline

<table>
<thead>
<tr>
<th>State:</th>
<th>Team Name:</th>
<th>Date Completed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Estimated Time for Completion</td>
<td>Meeting Time/Location</td>
</tr>
</tbody>
</table>
| Facilitator Prep Week FACILITATOR ONLY Week of January 16 | 3 hours | Wednesday, January 17 (Orientation Time) | Facilitator only tasks:  
- Participate in Facilitator Orientation  
- See Prep Week section of the Facilitator Guide  
- Post Introduction |
| Week 1: TEAM Week of January 22 | 1 hour | |  
- Finalize *At-a-Glance Timeline  
- Create account on [www.transitioncoalition.org](http://www.transitioncoalition.org)  
- Complete online Self-Study Survey (Pre) |
| Week 2: ON YOUR OWN Week of January 29 | 3-5 hours | |  
- Complete The Essentials of Self-Determination learning module  
- Complete *My 3 Questions  
- Facilitator: Office Hours offered January 29, 1-3 PM CT |
| Week 3: TEAM Week of February 5 | 1 ¼ - 2 ¾ hours | |  
- Discuss module and My 3 Questions  
- Complete *My 3 Questions Summary  
- Complete the SSSD Teaching Practices Review and Discussion  
- Review the *School-wide Student Involvement & Self-Determination Mapping Tool |
| Week 4: ON YOUR OWN Week of February 12 | 1-3 hours | |  
- Complete the *School-wide Student Involvement & Self-Determination Mapping Tool  
- Facilitator: Office Hours offered February 12, 1-3 PM CT |
| Week 5: TEAM Week of February 19 | 1 ¼ - 2 ¾ hours | |  
- Review *SSSD Tally results from Week 3  
- Review results of Mapping Tool  
- Complete *SSSD Prioritization |
| Week 6: TEAM Week of February 26 | 1 ¼ - 2 ¾ hours | |  
- Review *SSSD Prioritization  
- Watch Week 6 online presentations  
- Complete *SMART 6-Week Goal-Setting  
- Complete *Team Action Plan  
- Facilitator: Schedule Team Action Plan check-in call with TC staff (plan for 15-30 minutes) |
| Weeks 7-12: ON YOUR OWN Week of March 5-Week of April 9 | 2-10 hours | |  
- Implement action steps, monitor and document completion of action steps.  
- Facilitator: Office Hours offered March 26, 1-3 PM CT  
- Additional team meeting(s) as needed |
| Week 12: TEAM Week of April 16 | 1 ¼ - 2 ¾ hours | |  
- Report out on *Team Action Plan  
- Score *Goal Attainment Scale  
- Complete *Team Reflection & Next Steps  
- Send in your team's completed toolkit  
- Celebrate success!  
- Complete online Self-Study Survey (Post) |

*The facilitator will submit completed copies of these items to the Transition Coalition.*
### Measurable Post-Secondary Goals

**Education/Training** - Vu takes ROTC classes in high school and wants to go into the Army and take art classes.

**Employment** - Join the Army.

**Independent Living** (as appropriate) - Upon completion of high school, I (Vu) will live in military housing or with my needs.

### Transition Services

Based on age appropriate transition assessments, in the spaces below, identify Transition Services appropriate for Vu.

**Services may include:** Instruction, Related services, Community experiences, the development of Employment, acquisition of Daily Living Skills or provision of a Functional Vocational Assessment.

<table>
<thead>
<tr>
<th>Education/Training</th>
<th>Transition Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Measurable Postsecondary Goal</strong></td>
<td><strong>Transition Services</strong></td>
</tr>
<tr>
<td>Vu takes ROTC classes in high school and wants to go into the Army and take art classes.</td>
<td>Collect information about applying for art courses at community college.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th>Transition Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Measurable Postsecondary Goal</strong></td>
<td><strong>Transition Services</strong></td>
</tr>
<tr>
<td>Employment - Join the Army.</td>
<td>Vu will meet with the Army recruiter when the recruiter visits Little Town High School. Will meet with Vu to conduct an Employment Ieval.</td>
</tr>
</tbody>
</table>
### Transition Planning Prioritization Form: EXAMPLE

**TEAM:** We’re the best High School

**DATE:**

Write your identified areas of strengths and needs into this form. The form combines I-13 compliance items with quality indicators of transition planning as a guide for the discussion. Use the data from the IEP Review Activity, the QI data, the I-13 Reflection Form and your professional wisdom to identify strengths and needs.

<table>
<thead>
<tr>
<th>Secondary Transition Related Data</th>
<th>I-13 Compliant?</th>
<th>QI Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Do postsecondary goals target education/training, employment, and when appropriate independent living?</strong></td>
<td>Yes or No</td>
<td>QI Score: 2.8</td>
</tr>
<tr>
<td>I-13: Appropriate Measurable Postsecondary Goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strength: Transition coordinators develop goals from students’ dreams. We have ongoing professional development and resources for developing effective goals.</td>
<td>Yes or No</td>
<td>QI Score: 2.8</td>
</tr>
<tr>
<td>Need: Some of the developed goals involve process activities (filling out a job application) instead of a measurable outcome (working at a local business). Need a process for determining if a student needs an independent living goal.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| **Is progress toward postsecondary goals reviewed on an ongoing basis?** | Yes or No | QI Score: 2.8 |
| I-13: Postsecondary goals updated annually | | |
| Strength: IEP meetings are scheduled 6 weeks in advance. We have a master calendar of when IEP meetings need to take place throughout the year. | Yes or No | QI Score: 2.5 |

| **Are postsecondary goals based upon student strengths, interests, and preferences?** | Yes or No | QI Score: 2.5 |
| I-13: Postsecondary goals based upon age-appropriate transition assessments | | |
| Strength: We use interviews and observations to determine students’ strengths, interests, and preferences. | | |
| Need: Develop a questionnaire to guide the interview and observation process for teachers. Research available informal and formal transition assessments so we may update our current selection. | | |

| **Are transition services and course of study identified to assist student to reach postsecondary goals?** | Yes or No | QI Score: 2.3 |
| I-13: Transition services include course of study | | |
| I-13: Transition services that reasonably enable postsecondary goals | | |
| Strength: We have standardized forms for courses of study. Counselors have graduation requirement and credit tracking forms that are easily accessible to teachers. | | |
| Need: Create the courses of study along with the student to determine which educational experiences and classes will assist him or her to reach postsecondary goals. | | |

*Transition Coalitioon Self-Study IDEA & Secondary Transition Unit - Facilitator*
“The best part was collaborating with my team to work toward and achieve the same goal.”
Facilitator Support/Coaching

Self-Study Facilitator Community – Fall 2016

Welcome, Self-Study Facilitators

Facilitator Preparation Week
- Prepare for the Self-Study and your role as Facilitator: prepare for Week 1 meeting.

Week 1: TEAM
- Facilitate team meeting to review the Self-Study purpose, activities, and find meeting times and due dates.

Week 2: ON YOUR OWN
- Complete the online module, ensure team members complete module, prepare for week 3 meeting.

Week 3: TEAM
- Facilitate team meeting to review IDEA and Indicator 13, and practice reviewing an IEP for compliance.

Week 4: ON YOUR OWN
- Apply what you learned about IDEA and Indicator 13 to an IEP; prepare for week 5 meeting.

Week 5: TEAM
- Facilitate team meeting to review IEPs, identify strengths, prioritize needs; prepare for Week 6 meeting.

Week 6: TEAM
- Facilitate team meeting on setting a SMART 6-week goal and developing the Team Action Plan.

Weeks 1-11: ON YOUR OWN
- Support team in completion of Action Plan; hold phone call with TC staff; prepare for Week 12 meeting.

Week 12: TEAM
- Facilitate team meeting to wrap up Team Action Plan, review goal attainment, and discuss next steps.

Calls to discuss
Goal & Action Plan and Problem-Solving
Getting Results!

- **Program-level Products**
  - TA toolkits
  - Training on quality transition IEPs
  - Increasing use of effective practices
  - Improved process & use of materials

- **Satisfaction**
  - Good materials, examples
  - Resources!
  - Well prepared facilitators
  - Helpful support/training from TC

- **Impacting Practices = Impacting Students**
  - 96.7% of teams attained goals
  - 70% agreed/strongly agree goal lead to student impact
  - Estimated Impact on students

- **Knowledge**
  - Knowledge increased on pre/post learning objectives
Fidelity & Accountability

- Pre/Post Survey
- Module pre/post knowledge
- Week 12 Team Reflection
- Submit:
  - Team meeting sign-in sheets
  - Some activities
  - Goal & Action Plan

“This opportunity to reflect upon our current practices has been valuable for our team.”
Cherokee Central Schools
Self-Study Journey
Who we are....

• Tribally controlled school system on the Qualla Boundary in Western NC (Eastern Band of Cherokee Indians)
• Cherokee Elementary School
  Total number of students: 634
  Students with IEPs: 129
• Cherokee Middle School
  Total Number of Students: 303
  Students with IEPs: 62
• Cherokee High School
  Total Number of Students: 305
  Students with IEPs: 71
Our Team

• Transition Specialist-Facilitator
• Middle School Social Worker
• Speech and Language Pathologist
• Middle School Life Skills teacher
• Middle School Inclusion teacher
• High School Life Skills Teacher
• High School OCS Teacher
• High School Inclusion teacher
• Community Rehabilitation Provider
Cherokee Central Schools Self Studies

- Student Involvement & Self-Determination—Spring 2018
- IDEA and Secondary Transition—Fall 2018
- Building a Transition Assessment Toolkit—Spring 2019
Student Involvement & Self-Determination

Objectives:

• Learn about the critical features of self-determination and student involvement;

• Identify the SISD quality practices that are implemented and supported in our school/district and reflect on our current practices;

• Review resources and materials for teaching SISD;

• Prioritize an area of improvement for increasing the quality practices for increasing SISD in our school/building; and,

• Develop and implement a Team Action Plan.
Quality Indicators of Exemplary Transition Programs Needs Assessment Summary – Self-Study Unit, Student Involvement Domain

TEAM: NC/BE-Cherokee
DATE: 2/21/2018

This report includes your team results for the Student Involvement domain of the Quality Indicators of Exemplary Transition Programs Needs Assessment -2 (QI-2) (Morningstar, Erickson, Lattin & Lee, 2012).

The score for each quality indicator statement is an average of your team’s total. The highest average for each is 4, and lowest is 1.

- The higher the score, the more your team has achieved this indicator.
- The lower the score are items to consider for targeted improvement.

<table>
<thead>
<tr>
<th>Student Involvement</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Decision-making skills are taught using evidence-based curriculum and/or strategies.</td>
<td>1.86</td>
</tr>
<tr>
<td>2. Opportunities to make real-life, meaningful choices are provided to students.</td>
<td>1.86</td>
</tr>
<tr>
<td>3. Goal setting skills using evidence-based curriculum and/or strategies are taught.</td>
<td>2.00</td>
</tr>
<tr>
<td>4. Opportunities for students to learn about specific post-school options (e.g., postsecondary education and training, employment, independent living) are provided.</td>
<td>2.29</td>
</tr>
<tr>
<td>5. Evidence-based curriculum and/or strategies are used to teach students to develop and lead their transition planning process.</td>
<td>1.43</td>
</tr>
<tr>
<td>6. Students have the opportunity to lead their IEP and transition planning process.</td>
<td>1.86</td>
</tr>
<tr>
<td>7. Parents are provided with information and training to support student self-determination and self-advocacy.</td>
<td>1.71</td>
</tr>
</tbody>
</table>
Cherokee Central School’s Student Involvement and Self-Determination Goal

We will develop materials (used during two meetings conducted during this action plan time) to share with families about how they can support and provide SISD quality practices.

1st Meeting: PETS Introduction

2nd: Transition meeting
Goal Attainment Scaling (GAS)

• Much More than Expected:
By 6/1/2018, we will develop materials (used during two meeting conducted during this action plan time) to share with families about how they can support and provide SISD quality practices. We have a timeline for more meetings next fall and have used our evaluation surveys to improve our implementation.
What we Learned

**Lessons Learned**
- Administrative buy-in is critical.
- Parents are craving more information about options for their children.
- Education regarding WIOA, ABLE, and other new legislation/programs is needed for teachers and parents.

**Keys to Success**
- Staff participation incentives & understanding of purpose
- The diversity of the group to include community partners
- Understanding parents’ wants and needs to include cultural sensitivity
IDEA and Secondary Transition
IDEA and Secondary Transition

Objectives:

• Learn about the transition planning process;
• Learn about Indicator 13 and how it is used to review IEPs for compliance;
• Review IEPs from our building to determine the extent to which they meet Indicator 13;
• Consider various sources of data to prioritize areas of improvement for meeting Indicator 13; and
• Develop and implement a *Team Action Plan* to make changes.
Quality Indicators (QI-2) Summary Report for Transition Planning Domain

Quality Indicators of Exemplary Transition Programs Needs Assessment Summary – Self-Study Unit, IDEA

TEAM: BIE: Cherokee
DATE: 10/9/18

This report includes your team results for the Student Involvement domain of the Quality Indicators of Exemplary Transition Programs Needs Assessment -2 (QI-2) (Morningstar, Erickson, Lattin & Lee, 2012).

The score for each quality indicator statement is an average of your team’s total. The highest average for each is 4, and lowest is 1.

- The higher the score, the more your team has achieved this indicator.
- The lower the score are items to consider for targeted improvement.

<table>
<thead>
<tr>
<th>Student Involvement</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Transition planning begins early in a student’s educational experience (but no later than 16 years old).</td>
<td>1.56</td>
</tr>
<tr>
<td>2. Progress toward student’s postsecondary goals are reviewed on an ongoing basis.</td>
<td>1.78</td>
</tr>
<tr>
<td>3. Transition planning incorporates student-centered approaches (e.g., MAPS, Personal Futures Planning)</td>
<td>1.78</td>
</tr>
<tr>
<td>4. Postsecondary goals are based upon student strengths, interests, and preferences.</td>
<td>2.00</td>
</tr>
<tr>
<td>5. Postsecondary goals target postsecondary education/training, employment, and when appropriate independent living.</td>
<td>2.00</td>
</tr>
<tr>
<td>6. Transition services and a course of study are identified to assist the student to reach postsecondary goals.</td>
<td>1.89</td>
</tr>
<tr>
<td>7. Annual IEP goals addressing both academics and transition needs are identified.</td>
<td>2.11</td>
</tr>
<tr>
<td>8. Approaches are used during transition planning to identify outcomes supporting student and family cultures.</td>
<td>1.67</td>
</tr>
</tbody>
</table>

Total Number of Responses: 8
Cherokee Central School’s Goal for IDEA & Secondary Transition

By 12/10/2018, we will develop a directory of community service providers to share with teachers, students and families.
Goal Attainment Scaling (GAS)

Much more than expected!!
By 12/10/2018, we will develop a printed booklet to include descriptors of secondary and postsecondary programs based on high school diploma tract and a directory of community services providers to share with teachers, students and families.
What We Learned

Lessons Learned

➤ It is hard to “nail-down” current services available in our area by provider.

➤ Different levels of services between tribal and state agencies (i.e., VR).

➤ Teacher understanding of transition from “least-restrictive” to “most-supportive” & “entitlement” to “eligibility” regarding adult services.

Keys to Success

 ✓ Ability to integrate services provided by tribal and state agencies

 ✓ The diversity of the group to include community partners

 ✓ Understanding student’s wants & needs for adult services

 ✓ Understanding parent’s wants & needs relating to adult transitions

 ✓ Cultural sensitivity
Building a Transition Assessment Toolkit
Building a Transition Assessment Toolkit

Objectives:

• Learn about the transition assessment process;
• Learn about the features of a transition assessment toolkit;
• Review that range of transition assessments for our school system;
• Prioritize an area of improvement for building a transition assessment toolkit for our school system; and,
• Develop and implement a Team Action Plan.
Quality Indicators (QI-2) Summary Report for Transition Assessment Domain

Quality Indicators of Exemplary Transition Programs Needs Assessment
Summary – Self-Study Unit, Transition Assessment Domain

TEAM: BIE-Cherokee
DATE: 2/14/2019

This report includes your team results for the Transition Assessment domain of the Quality Indicators of Exemplary Transition Programs Needs Assessment - 2 (QI-2) (Morningstar, Erickson, Lattin & Lee, 2012).

The score for each quality indicator statement is an average of your team’s total. The highest average for each is 4, and lowest is 1.
- The higher the score, the more your team has achieved this indicator.
- The lower the score are items to consider for targeted improvement.

Total Number of Responses: 8

<table>
<thead>
<tr>
<th>Transition Assessment</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A wide variety of formal and informal transition assessments are available to use with students.</td>
<td>1.75</td>
</tr>
<tr>
<td>2. Assessments for each student evaluate specific transition needs, strengths, preferences, and interests.</td>
<td>2.00</td>
</tr>
<tr>
<td>3. The transition assessment process is ongoing throughout the year.</td>
<td>2.38</td>
</tr>
<tr>
<td>4. Transition assessment results are shared with students, families and staff in a meaningful way.</td>
<td>2.38</td>
</tr>
<tr>
<td>5. Students’ postsecondary goals are based on transition assessment results.</td>
<td>2.75</td>
</tr>
<tr>
<td>6. A summary of performance with recommendations for meeting postsecondary goals is developed when student exits high school.</td>
<td>2.88</td>
</tr>
</tbody>
</table>
Cherokee Central School’s Goal for Building a Transition Assessment Toolkit

By 5/1/2019, we will have developed a draft transition assessment toolkit focusing on the areas of career development/employment, and post-secondary education/training. It will include a minimum of two assessments appropriate for each level of support students require.
Goal Attainment Scaling (GAS)

**Much more than expected!!**

By May 1, we have developed a transition assessment toolkit focusing on the areas of career development/employment, and post-secondary education/training. It will include more than two assessments appropriate for each level of support students require. We have begun planning the life skills section we will focus on and include next year.
What We Learned....

Lessons Learned

- Teachers had a misunderstanding about what assessments they were allowed to use & what is available.
- The importance of collaboration with PETS provider to reduce duplication of work.
- Transition assessment must begin as early as possible.
- Lack of understanding of how day-to-day activities relate to skill development for transition.

Keys to Success

- The diversity of the group to include community partners
- Understanding level of support needed for individual students
- Teacher/staff knowledge of availability of various postsecondary programs & options (both locally & statewide)
- Cultural sensitivity
- School system & community support
Where we are now....

- Transition Meeting held in Spring incorporated the video “The Interview” to open a discussion on expectations and how our students can be limited by what their circle of support feels they can do.
- Building a schedule of meetings “10 month Talks” on topics parents and students have asked for more information on. (SSI, ABLE accounts, post-secondary options and how to prepare, etc.)
- Have been asked to be part of a Tribal advocacy and action committee to improve services for all enrolled members and their dependents who have a disability
Where are we now....

• Submitting grant to the Bureau of Indian Education to expand our 18-22 year old services by creating Pathways to Independence post secondary program and a Project SEARCH site.

• PETS through our CRP has increased from two hours a week in 2017-2018 school year to 1 day per week in 2018-2019 school year and is budgeted for a full-time person for 2019-2020 school year.

• Cherokee Parks and Recreation Department has partnered with CCS to coordinate Qualla Boundary Special Olympics which allows us to offer more sports and competition opportunities and expand number of athletes.
Fall 2019 Self-Study Opportunities

Student Involvement & Self-Determination
• Overview of self-determination & effective practices
• Evidence-based practices for student involvement in transition planning

IDEA & Transition
• Overview of IDEA transition requirements for IEP
• Focus on quality practices for transition planning
• Team Review and Self-Evaluation of IEPs

• Recruitment: May, 2019 (TC website, flyers, emails, NTACT e-blast, etc.)
• Registration Materials: www.transitioncoalition.org/blog/transition-coalition-self-study
• Registration Deadline: August 15, 2019 (sooner is better!)
• Starts: September 9, 2019       Ends: December 13, 2019
Transition Coalition Self-Study

I have learned so much more about transition from the Self-Study than I ever thought I could. It’s a wonderful way to learn and work with my colleagues.

— District Transition Coordinator

I liked the online, step-by-step, district aspect of the Self-Study. We were able to address the specific needs of our district.

INTERESTED IN MORE INFORMATION ABOUT SELF-STUDY?

- Check out our recent Self-Study webinar!

Transition Coalition Self-Study: What’s It All About?

Dana Hiett
dana@ntact.org
Transition Coalition & NTACT
University of Kansas
www.transitioncoalition.org

Contact us to find out more about Transition Coalition Self-Study
Who Can Participate?

NTACT Intensive TA States
• AK, AZ, AR, DE, MD, NH, NV, ND, OR, WV, BIE, RMI
• Included in NTACT TA agreement

Teams from states that are not NTACT Intensive TA States
• $252/Individual for teams of 4-8 OR $2029/Team of 9-12 (4 people free)
• CONTACT US

All Teams receive:
• all print materials
• web materials
• resources
• guidance/support to implement the SS
• ongoing coaching (even beyond the 12 weeks)
Indicator 13 Checklist Activity

Vu’s IEP Review
Mary E. Morningstar, Ph.D.
University of Kansas
Transition Coalition Self-Study

September, 2013
More Info & Registration Materials

• NTACT website  www.transitionta.org
• Transition Coalition  www.transitioncoalition.org/blog/transition-coalition-self-study

• TC Self-Study  tcselfstudy@ku.edu
• Mary Morningstar  mem28@pdx.edu
• Dana Lattin  dlattin@ku.edu