

Translating Evidence for Successful Transitions (TEST)



SUPPORTING STUDENT-LED TRANSITION PLANNING FOR STUDENTS WITH EMOTIONAL DISTURBANCE

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Foreword

Young adults with mental health difficulties are capable of successfully engaging in school, training, and employment. The support these individuals receive as they progress through secondary education can help them realize their potential in life after high school. Many times, teachers see different results for these students such as high school drop-out, lower rates of post-secondary education and employment, and even higher rates of involvement with law enforcement, poverty, and homelessness upon their exit from high school; however, with the right information, resources, and determination teachers can make a lasting impact on these students.

To help students with ED experience post-secondary success, teachers need resources to assist them with planning and preparing for students' transition from high school into education and training programs and employment in young adulthood. This practice guide will offer practical ways to plan for these students' successful transition from high school to post-secondary life, which can lead to positive outcomes for students with ED.

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About this Guide

What is it?

This is a guide on how to aid students with emotional disturbances (ED) to lead their Individualized Educational Program (IEP) meetings during high school. In this guide, a student-led IEP is an IEP where a student with ED holds a leadership role during the IEP meeting, and actively participates in the writing, creation, and implementation of the IEP, including its transition component. This guide will outline the steps and activities needed to support student-led IEP meetings for students with ED.

Who is this for?

This guide is for a variety of educators who support and serve students with ED and other disabilities such as special education teachers, transition planners, guidance or mental health counselors, as well as other related service providers who serve students with ED. For this guide, “students with ED” includes students formally identified as having an ED who receive special education services, some students identified as having Other Health Impairment (OHI), or students with IEPs who have behavioral goals. Students with other disabilities, or students with 504 plans for whom teachers are providing extra support would also benefit from the content and lesson plans included in this curriculum.

This guide is, in part, intended to help educators increase their awareness of the struggles faced by students with mental health conditions (MHC). Mental health conditions are “invisible disabilities” and are not overt. MHCs can manifest themselves in different ways and conditions can co-occur. Some co-occurring disabilities are depression, anxiety disorders, learning disorders (such as dyslexia), mood swings, and Attention Deficit Hyperactivity Disorder (ADHD).

Why should we focus on students with ED?

High school students with ED who receive special education services are a vulnerable population that is often under-recognized and underserved by existing school-based services. Students with ED drop out of school more than any other group of students. This shortening of their education has been related to earning lower wages, lower employment rates, and poorer health (Pleis, Ward, & Lucas, 2010). Youth with ED also participate in postsecondary education less frequently and have lower rates of post-school employment than many other categories of students with disabilities. Missed early employment and educational opportunities can result in individuals achieving little economic progress, a pathway that can be difficult to modify later in life. (See Appendix J for more information)

How do students with ED benefit from student-led IEPs?

Student-led IEPs are a practice that allows students to develop self-advocacy, self-determination and problem-solving skills. Student-led IEPs are correlated with improved in- and post-school outcomes for youth and young adults with ED. Consider this:

- Student-led IEPs are correlated to *increased graduation rates and decreases in inappropriate behaviors* (Wehmeyer & Palmer, 2003).
- Youth who took a leadership role in their transition planning had significantly *higher rates of postsecondary education enrollment* (Wagner & Newman 2012; 2014).
- Students and teachers report that students who lead their IEPs *know more about their disabilities, legal rights, and appropriate accommodations* than students who do not lead their IEPs (Mason, McGahee-Kovac, Johnson, & Stillerman, 2002).
- Students who incorporate self-determination goals into the transition component of their IEPs are more likely to *earn higher incomes* one year after graduation (Wehmeyer, 2004).

- Student-led IEPs lead to *increased participation from parents* during IEP meetings (Mason, McGahee-Kovac & Johnson, 2004).

And while the benefits of student-led IEPs are widely understood and supported by research evidence, **only 11% of students with ED lead their IEP meetings**; this low rate of student-led IEPs is found across disabilities (Wagner & Newman, 2012). This practice guide provides educators the tools to support their students with ED to lead their IEP meetings. (See Appendix K for more information)

I. Understanding the Basics: What You Need To Know About Student-Led IEPs for Students with ED

- ✓ **Social and relational benefits of student-led IEPs for students with EDs**
- ✓ **Range of student involvement in student-led IEPs for students with ED**
- ✓ **Assuring authentic student leadership and participation for students with ED**
- ✓ **General and ED-specific barriers and strategies to student-led IEPs**

I. Understanding the Basics: What You Need To Know About Student-Led IEPs for Students with ED

Student-led IEPs provide the ideal opportunity for students to take ownership of their education and transition goals, and to demonstrate that ownership at their annual IEP meeting. Supporting the goals of student-led IEPs involves creating the capacity to implement student-led IEPs within your school framework and collaborate with your transition planning partners. Transition planning will be part of the IEP process for all students aged 16 and older (per federal regulations), and perhaps earlier depending on the mandates of your particular state. The IEP and transition planning process can be adapted to the students' level of ability and comfort with participating in or leading the process.

Social and relational benefits of student-led IEPs for students with EDs

In addition to the long-term benefits of student-led IEPs, there are several more immediate, experiential, social and relationship benefits that are particularly relevant for students with Emotional Disturbance (ED). Students with ED often experience social isolation and diminished self-confidence; preparing for a student-led IEP provides many opportunities to create experiences and activities to address these exact challenges. Student-led IEPs can:

- *Promote connections for students.* Student-led IEPs can foster a connectedness between students and the adults they interact within their lives (e.g., special education teacher or LEA, parents, employers). As students prepare for and lead their IEP, they will have conversations with these adults, which can enhance their connection to individuals as well as connection to school and the IEP and transition planning process. This is particularly important for students with ED as they often feel disengaged, and students who are disengaged are more likely to drop out of high school. Keeping students engaged and connected is critical to helping the student stay enrolled in school.
- *Build decision-making capacities.* The transition out of high school often includes a shift in decision-making from parents to students. After a student turns 18, they may seek advice from their parents, but they are legally allowed to make their own life choices if they are their legal guardian. If a student's parents remain their legal guardians after they turn 18, parents retain decision-making power in the student's life. Regardless, it is developmentally appropriate for juniors and seniors to begin to make at least some of their own decisions when it comes to their education, employment, and independent living goals. The development of decision-making skills can begin when students are freshman and sophomores. High school students can build their confidence and find the best ways to approach making mature choices.
- *Instill a sense of control.* When students are in a position of planning for themselves, it helps them gain a sense of control over their lives—fostering a sense of agency or acting on their behalf. Students who believe they can act on their behalf and make things happen are less likely to feel as if they have no control over what is happening in their lives.
- *Engage families to be more involved in the IEP and transition planning process.* For students with ED, especially at the secondary school level, parents often participate less in school activities. Having a student-led IEP can provide an opportunity for a parent to take part in a school-based activity, as well as an opportunity for parents to directly witness and experience their children's capabilities and progress, and celebrate the accomplishment of leading an IEP.

- *Provide a forum for students to be successful.* School experiences for students with ED are often deficit-based, with a focus on what is not going well and what students need to improve. Students with ED may be less encouraged to make their own decisions, and as such may experience fewer typical developmental experiences during teenage years (e.g., increased self-sufficiency and independence). Leading an IEP meeting can provide an opportunity and a safe space for students with ED to have these experiences. The experience of successfully leading a team of educators, professionals and family members can promote self-confidence.
- *Help students practice social skills.* Students with ED often need adaptive social skills and may need support to interact with others using appropriate language, in new and more formal settings. Leading an IEP meeting is an opportunity to learn and practice important skills in a school setting. This is great practice and preparation to develop skills that could be generalized into other real-world settings (e.g., applying for a job). (See Appendix J for more information)
- *Build a dream for the future.* A student-led IEP provides an opportunity for students to highlight their identified goals, progress, and future plans. Students with ED often may feel limited control about the direction of their lives and decisions being made. By leading the development of IEP and transition goals, students may be able to begin to envision a hopeful future.

Range of student involvement in student-led IEPs for students with ED

Students' ability to lead their IEPs will depend on their skill set, their capacity (which includes the impact of their ED) as well as their preparation for the meeting. Understanding these variables can help teachers identify benchmarks of students' current capacities, as well as benchmarks to work toward through the transition planning process. There are three levels of student involvement in IEPs (informed by Mason et al., 2004):

- **Student-involved (Level 1):** A student explains his/her disability, shares information on their strengths and challenges.
- **Student-partnered (Level 2):** A student presents information about or reads from his/her transition component of the IEP and goals for transition planning. Includes activities from Level 1.
- **Student-led (Level 3):** A student is involved in a meaningful and authentic way. The student leads the IEP conference, including preparation (e.g., inviting team members), leading the actual meeting (e.g., doing introductions, leading meaningful discussions of the IEP), and closing (e.g., thanking people for attending). Includes activities from Levels 1 and 2.

The focus of this curriculum is to provide the tools and supports to facilitate student-led IEPs for students with ED – Level 3. It is important to recognize that while some students may be ready to prepare for and lead their IEP, others will need to work towards this goal over time. Levels of student involvement exist on a continuum, and depending on each student, levels of participation may look different. Some students may be comfortable and ready to lead the entire meeting, while others may participate by introducing team members and discussing their strengths and challenges. Teachers can work with students to determine their comfort with different levels of involvement and set IEP transition goals that include having student-led IEPs to foster student's self-advocacy and self-determination efforts.

Table 1 provides an overview of the types of activities that students of different ages can do to lead or work toward leading their IEP meetings over time, as well as describes actual IEP meeting involvement. The levels on the left denote the increasing capacities of students and move from student-involved (level 1) to student-partnered (level 2) to student-led (level 3) engagement.

Table 1: Student IEP involvement over time

IEP Meeting – Levels of Student Engagement	
Level 1	<ul style="list-style-type: none"> • Introduce self and attendees at the annual IEP meeting. • Share results of assessments and education and career exploration exercises with IEP team members. • Discuss academic progress, strengths and needs for growth (could come in the form of a multimedia presentation). • Begin building transition portfolio with special educator assistance through compiling all IEP meeting materials.
Level 2	<ul style="list-style-type: none"> • Create letters of invitation to community agencies relevant to transition goals • Introduce self and attendees at annual IEP meeting. • Discuss academic progress and strengths and needs for growth (could come in the form of a multimedia presentation). • Discuss experience with ED and any challenges and/or needs it presents. • Share proposed transition and IEP goals. • Participate in conversation amongst attendees. • Write thank you notes/emails to attendees following the meeting. • Continue to build transition portfolio with special educator assistance as needed.
Level 3	<ul style="list-style-type: none"> • Create letters of invitation to community agencies relevant to transition goals. • Introduce self and attendees at the annual IEP meeting. • Discuss academic progress as well as strengths and needs for growth (could come in the form of a multi-media presentation). • Discuss experience with ED and any challenges and needs it presents. • Share proposed transition and IEP goals as well as planned data collection and assessment activities. • Facilitate/lead conversation amongst attendees. • Write thank you notes/email to attendees following the meeting. • Continue to build a transition portfolio with minimal assistance.

Assuring authentic student leadership and participation for students with ED

The 2004 Individuals with Disabilities Education Act (IDEA) requires that transition planning activities (1) include students in IEP meetings when transition services will be discussed, and (2) are based on student needs, taking into account their interests and preferences (34 C.F.R. 300.344 (b) (1) and 300.29). Inviting students to meetings, however, does not guarantee meaningful student involvement, the opportunity for equal participation or decision-making, or that transition activities will be based on students' needs, preferences or interests. Student-led IEPs provide an opportunity to prevent these potential pitfalls.

Supporting students with ED to take a leadership role in their IEP meetings presents an opportunity to challenge the stigma that often accompanies living with mental health issues. Stigma is what sets mental health concerns apart from other types of disabilities and can introduce an additional layer of challenge for students with ED, their parents, teachers and administrators. For example, some students with ED may exhibit behaviors that are perceived as challenging, difficult, or disruptive. Other students with ED may have more “invisible” disabilities, which are not immediately obvious and may result in a student being perceived as uninterested and disengaged.

It is important that students with ED, like any other students with IEPs, are approached based on their strengths and their interests, as opposed to being approached as students whose primary identity is their ED. For some students, having an ED can result in feeling marginalized. Presenting students with a leadership opportunity during their IEP meeting is one way to decrease this feeling, while at the same time facilitating students' skills and personal growth.

General and ED-specific barriers and strategies to student-led IEPs

Implementing any change in procedures can be challenging, and it is no different for introducing student-led IEPs into your IEP and transition planning processes. It is important to be honest about what barriers may exist, and to keep focus on the reasons for implementing student-led IEPs, and the potential impact of student-led IEPs on students' current and future success.

Understanding in advance what barriers you may encounter, as well as having concrete strategies about how to address them, is helpful as you prepare to initiate student-led IEPs. Table 2 presents barriers and strategies that are not ED-specific and could apply to any student-led IEP process (informed by Hawbaker, 2007).

Parents may follow the historic precedent of discouraging their students with ED from pursuing employment. However, there needs to be a partnership with families in creating postsecondary transition goals, specifically employment goals. The Center for Parent Information and Resources (CPIR) has parent centers that serve families with children with disabilities and help parents become involved in their child's transition planning. CPIR has either a Parent Training and Information Center (PTI) or Community Parent Resource Centers (CPRC) in each state, with over 100 locations total in the US and its territories. These centers work with families with children up to age 26. Parents can find their center here:

Virtual learning

While online education has been around for some time, virtual learning has become the new normal for students to continue due to the COVID-19 pandemic. The National Center for Learning Disabilities released an educator's guide to virtual learning. It provides information and tips to help your students and their families while learning virtually.

The virtual learning guide can be found here: <https://www.nclld.org/wp-content/uploads/2020/03/An-Educators-Guide-to-Virtual-Learning-4-Actions-to-Support-Students-With-Disabilities-and-Their-Families.pdf>

<https://www.parentcenterhub.org/find-your-center/>. Their website offers webinars and a resource hub that family members can access.

Families should not discourage youth with ED from seeking employment in order to maintain federal benefits and financial assistance. Students with ED and their families should keep in mind that incentives to pursue employment are available through the Social Security Administration (SSA):

- SSDI recipients have nine trial work months every five years in which to test their ability to work while remaining eligible for cash benefits (Diehl, Douglas & Honberg, 2014).
- Under section 1619 (b) of the Social Security Act, Medicare coverage can continue for up to 93 months after the date of hire (Diehl, Douglas & Honberg, 2014).
- SSA work incentive programs such as the Plan to Achieve Self Support (PASS) and the Ticket to Work allow beneficiaries to keep medical benefits until their earnings and benefits are sufficient to cover their expenses (Diehl, Douglas & Honberg, 2014).
- The ABLE Act, enacted in 2014, allows for young adults to save money for “qualifying expenses” such as a car, college, training, healthcare, and prevention and wellness in an ABLE bank account without being taxed by the government on interest accrued. All funds placed in an ABLE account do not affect SSI status unless they exceed \$100,000 (Mizrahi, R., Duperoy, T., Youth Advisory Board of the Transitions ACR & Logan, D., 2017).

Students with ED pursuing postsecondary training and employment allows these students to utilize their talents and capacities for productivity (Harnois & Gabriel, 2002). Research shows that most adults with mental illnesses want to work and about six out of ten can succeed with appropriate supports (Frounfelker et al., 2011; McQuilken et al., 2003; Mueser, Salyers & Mueser, 2001; Lutterman, 2013). The perception that students with ED would not be successful in a work environment is often not true and limits their community integration, sense of self-efficacy, and independent living prospects. Employment provides time structure, social contact, collective effort and purpose, social identity, and regular activity (Harnois & Gabriel, 2002, p. 5).

Table 2 – General barriers and strategies to student-led IEPs

Barrier	Strategy
Will take too much time to prepare and implement	<ul style="list-style-type: none"> • Review the student led practice guide lessons and think of them as resources. If it fits to use them as intact stand alone lessons, do it that way. If the structure of the lessons provides ideas and you can generate a list of things to do as you work with your students through the weeks you teach them in those “teach-able moments”, use the information in the lessons that way. These guides are meant to be helpful, and a resource, not another thing on your ever growing to-do list. • A natural time to discuss students strengths and needs would be during the required progress reporting periods. As progress monitoring is being conducted every 4 and ½ weeks, the student and teacher can discuss student progress toward goals. These conversations will give the student opportunities to reflect on their progress, talk about strengths they have noticed they have as well as needs they may be aware of. It also keeps them on top of what they are doing and involved them in a natural way in their IEP process. • Incorporate student-led IEP planning into required academic subject areas. For example, a student writing down their strengths can be incorporated into an English Language Arts lesson or a graphing of their academic progress on a scatter plot can become a part of a math lesson.
Loss of control over the IEP process	<ul style="list-style-type: none"> • To ensure that all required elements are included in a student-led IEP, work in partnership with students to prepare and write their IEP plan. The student should have ownership of the process, but you can guide the way to ensure proper completion. You can schedule periodic check-ins to monitor the student’s progress.
Lack of administrative support	<ul style="list-style-type: none"> • Meet with administrators at the beginning of the school year, clearly outlining how you plan to facilitate and lead student-led IEP efforts and how this will require few resources from the school. Explain this at a low-cost, high gain scenario. Also, presenting your plan up front can allow administrators to provide feedback at the onset, ensuring your work corresponds with what administrators would like to see within your school and thus, achieve “buy-in” from them. This conversation should be had with the building level principal as well as with the LEA.
Need to attend to required assessments and/or state standards and requirements assessments/state standards	<ul style="list-style-type: none"> • Enhancing students’ self-determination skills through the work of planning and implementing a student-led IEP can help students enter testing more confidently, which can lead to improved performance. • Use planning efforts for student-led IEPs as lessons to strengthen core academic areas for the student (tracking academic progress through math lessons, completing written assignments about post-secondary goals, during English Language Arts lessons, etc. can make student-led IEPs compatible with demands to perform well on assessments and meet statewide standards.

Barrier	Strategy
Lack of resources to support student-led IEP	<ul style="list-style-type: none"> Utilize the practical tools which are included in this practice guide. Very few outside resources are needed to implement the lesson plans outlined in this practice guide to facilitate student-led IEP meetings. Review the student led practice guide lessons and think of them as resources. If it fits to use them as intact stand alone lessons, do it that way. If the structure of the lessons provides ideas and you can generate a list of things to do as you work with your students through the weeks you teach them in those “teach-able moments”, use the information in the lessons that way. These guides are meant to be helpful, and a resource, not another thing on your ever growing to-do list.
Parents may still want additional time with you	<ul style="list-style-type: none"> You can encourage parents to hold off on scheduling time with you until after the student-led IEP meeting has been conducted. You can mention that an IEP meeting itself is the most efficient platform for questions and discussions because all relevant individuals will be at the table. You can mention that the IEP meeting itself is the time when they will get the most satisfactory answers and input. You can communicate that if they still have items they would like to discuss following the IEP meeting, you would happily schedule time with them then.
Chronic absenteeism	<ul style="list-style-type: none"> At every grade level, special education students are frequently absent from school. Chronic absenteeism peaks in high school, where almost one quarter of special education students miss 10% or more of school days (U.S. Dept. of Education, 2019). Students with ED, in particular, may be struggling with symptoms and in some instances need to be hospitalized or receive ongoing treatment that keeps them from school. The transition team can collaboratively identify, with a student and their family, issues (disability-related or not) that are contributing to absences and brainstorm ways to overcome these during the IEP meeting (Attendance Works, n/d/-a). Members of the transition team can be identified as those that can help get students with ED to school when challenges come up (Attendance Works, n.d.-b). An attendance goal for the next school year can be developed. Resources to facilitate these activities are available on the Attendance Works website.

Concerned about meeting all the state curriculum standards and incorporating these lessons?

One teacher's solution: a Project-Based Learning Activity!

The vision: utilizing these lessons, students will create an auto biography including information about themselves, their needs and strengths as a learner, the disability that qualifies them for special education services, as well as their goals for high school and beyond.

Products from this project could include:

- a five-paragraph biographical essay
- a poem,
- a research paper about careers/career paths as well as
- a PowerPoint or other audiovisual presentation of the student's work.

Approaching these lessons this way allows for the student to increase their disability awareness, self-advocacy, and goal setting while they complete academic work addressing writing, technology, research, and communication state curriculum standards.

Other barriers and strategies are more specific to students with ED. While ED is a broad label, which encompasses a range of diagnoses and challenges, Table 3 details some commonly encountered ED-specific barriers as well as strategies to address them.

Table 3 – ED specific barriers and strategies to student-led IEPs

Barrier	Strategy
<p>Symptoms or characteristics of student’s ED (e.g., anxiety, depression) may affect their capacity to lead their IEP</p>	<ul style="list-style-type: none"> • Developing a trusting and respectful relationship with your students with ED is critical to support them during the IEP process. Devote time to getting to know each other, beyond the focus on the IEP, to create a safe space to discuss how their specific symptoms/characteristics may impact their ability to lead their IEP. Talk with your students about their strengths and needs in different settings, and strategies to increase their comfort with leading their IEP. Finding games or videos to help engage students with their IEPs and transition planning. See the attached tip sheet. There are many IEP instructional videos on YouTube that are youth friendly. For a student with an ED linked to internalizing and isolating behaviors, such as depression or anxiety, some targeted strategies include: <ul style="list-style-type: none"> ▶ Practice and role-play the IEP meeting ahead of time so that the student is comfortable with the process (see lesson plan #4). ▶ Finding a peer who has led an IEP meeting and who can befriend the student may help to alleviate anxieties about the IEP meeting. ▶ Create opportunities for the student to practice doing things that are difficult for them regularly, in safe settings where they feel comfortable and not afraid of making a mistake. This will help build confidence in their ability to participate well.
<p>A student with ED may have challenging or disruptive behaviors, and IEP team participants may be reluctant to work with the student</p>	<ul style="list-style-type: none"> • Devote extra effort and patience on your behalf to these students who can be difficult to engage. These students with challenging or disruptive behaviors often are isolated from other potential advocates and supports. Breaking through the emotional and interpersonal defenses a student may have built up over time can greatly benefit a student. This can lead to a large increase in a student’s sense of self confidence and interpersonal skills as they prepare to enter their post-secondary life. Validate their feelings. Acknowledge when things must be tough for them. Ask if there is anything you can do to help. • For these students, some targeted strategies include: <ul style="list-style-type: none"> ▶ Practice appropriate ways to respond to adults and other staff members. ▶ Creating materials with students about aspects of the student’s life in which they are successfully engaged, outside school activities, to illustrate positive parts of the student’s life and to show another side of the student. ▶ Plan for the possibility that the student might be triggered by some element of the conversation during the IEP meeting. Practice different scenarios including a plan for the student to take a time out if needed.

Barrier	Strategy
<p>Difficulty getting parents to attend IEP meetings</p>	<ul style="list-style-type: none"> • <i>Parent attendance:</i> Establishing a working relationship with parents early in the school year can help with getting parents involved. Early communication based on positive feedback, calls and notes home to celebrate successes (academic, behavioral, and social) can help strengthen the partnership between home and school and will likely increase parent participation in the IEP process. • Recognize that many families of students with ED often have additional challenges and constraints (e.g., lack of transportation, inability to take time off from work) that impact their ability to meet. Be mindful of these potential realities and find ways to facilitate attendance by: <ul style="list-style-type: none"> ▶ Holding meetings at an alternate location nearer to the student’s home. ▶ Arranging transportation to bring parents to the meeting location. ▶ Arranging for meetings to accommodate the parent’s work schedules.
<p>Parents may be uncomfortable with their child with ED in a decision-making position</p>	<ul style="list-style-type: none"> • As noted earlier, students with ED may, for a variety of reasons, have less experience than their non-ED peers with developmentally normative activities, which for teenage students include increased independence and leading decision making. As such, parents may hesitate to have their child leading their IEP process and may have concerns about the resultant plan. Some concrete strategies to support parents include: <ul style="list-style-type: none"> ▶ Encourage students and work in partnership with them to communicate with their parents about their IEP plans before an IEP meeting. If parents go into the meeting knowing what to expect they are less likely to be surprised and upset about what is talked about at the IEP meeting. ▶ Remind the parents that they are members of the student’s IEP team, and have an equal voice in the IEP process until the student reaches the age of majority. ▶ Encourage parents to consider a shared decision to invest in creating a good working relationship with their child as they go forward into post-secondary life. ▶ Frame the student-led IEP process as one that will help their son or daughter learn the skills they need to be independent and advocate for themselves upon exiting high school.

II. Preparing Your Students: Lesson Plans for Student-Led IEPs for Students with ED

- ✓ **Lesson 1 – Understanding your IEP**
 - IDEA Quick Guide
- ✓ **Lesson 2 – Build self-determination**
 - Self-Determination Student Self-Assessment worksheet
 - Goal Setting Practice worksheet
 - Statement of Strength, Interests, and Needs worksheet
- ✓ **Lesson 3 – Create goals for your IEP**
 - Creating SMART Goals worksheet
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 - Leading my IEP worksheet

II. Preparing Your Students: Lesson Plans for Student-Led IEPs for Students with ED

Generally, any student needs guidance and practice in how to lead a meeting, especially a meeting as important as an IEP. The IEP is particularly important as the outcome of this meeting—the transition component of the IEP—has a real impact on the services students receive in school and lays the groundwork for what life may look like after high school. Additionally, a meeting with adults who have had authority over a student may be especially daunting. Consequently, all students, and especially those with ED, will need an opportunity to develop skills to prepare them to lead their IEP.

Below are five lesson plans that emphasize relevant skill development and will help prepare your students with an ED to lead their IEP. These lesson plans are intended to be delivered in order, over the school year. We suggest that you leave at least 3 months before the scheduled IEP to work through the lesson plans. They are designed to be implemented in a small group setting but can also be delivered via one-on-one instruction. We anticipate that each of these lessons will take between 40-60 minutes to deliver. Depending on your time frame, schedule, and capacities of the students you work with, you could also break lessons into smaller parts – 20-30 minutes – as needed. Worksheets to use with students are included in each lesson plan.


Lesson 1 – **Understand your IEP.** Review of IDEA and past goals and performance through the IEP

Lesson 2 – **Build self-determination.** Understand student’s strengths, needed supports, preferences and goals

Lesson 3 – **Create goals for your IEP.** Identify IEP and transition planning goals and relevant community partners

Lesson 4 – **Prepare to participate in/lead your IEP.** Determine how the student will participate in/lead their IEP

Lesson 5 – **Practice participating in/leading your IEP.** Roleplay the IEP meeting

Throughout each lesson plan you’ll see the  icon. This highlights special consideration and/or strategies that are specific to working with students with ED.

Before beginning these lessons it’s important to explain to students what you’ll be working on together over the next few months, and what they can expect. Some sample language you can use to explain the process includes:

Over the next few months, we’re going to work together to prepare for your IEP (Individualized Education Plan) meeting. In the past you may or may not have been very involved in developing your IEP. We want to ensure that you are as involved as possible in preparing for and possibly leading that meeting. **We want to help you be more involved in your IEP because we know that when students are more involved in their IEPs they are more successful in school and have an easier time transitioning from high school into school or work.**

As we work together to build the skills you need to lead your IEP, we'll be thinking and talking about how you can be more involved. We'll identify specific parts you can lead. For example, we could decide that you'll introduce everyone who attends your IEP meeting. We may also decide that you want to lead the entire meeting. There is no one "right" answer about how to be more involved in your IEP. Our work together is to think about what works for you, what you want to work on before the IEP meeting, and how I can best support you.

Critical to the work of each lesson plan are the following:

- *Take time to build the relationship.* A student is much more than their ED. Take the time to get to know your students and about issues beyond their IEP and their ED, so that they can feel safe and comfortable. Students have hobbies, dreams for the future, family, friends, and many other things that shape them. Getting the bigger picture of who your student truly is will be crucial to having an honest conversation. Also, a student must feel comfortable and have a rapport with you to be introspective and be open about how they feel about themselves and their abilities during this process. The relationship-building you achieve up front will prove very useful as you work through the curriculum. And the simple act of doing the lesson plans in partnership with students will go a long way towards building these relationships.
- *Assess the student's comfort level with the setting.* Some students with ED may have reasons they are uncomfortable talking in group settings (e.g., social anxiety). Students with ED may also have exposure to traumatic events, and may have an increased need to ensure that they can meet with trusted individuals in spaces that are considered safe. This may result in different levels of comfort specific to doing these lessons in a group setting versus one-on-one between a student and an educator. Before beginning to work towards a student-led IEP with a student with an ED, you may need to connect with students individually to see what setting they would prefer to meet in when completing these lessons.

Lesson 1 – Understanding your IEP

What will be learned: Basics of IDEA, IEP/transition planning components, individual IEP goals, and performance. This introduction to the IEP and its components will allow students to prepare for and be more knowledgeable about the IEP process, which will allow more active participation and/or leadership in their IEP meeting.

Capacities built: *Responsibility* of students to learn more about their IEP and realize their opportunity to participate in this process; *Self-evaluation* of one's existing goals and capacity to achieve them.

Time: 45 -60 minutes (this lesson may take time depending on student's existing knowledge of their disability and their IEP. This lesson can be split into 2 sessions – activities 1-3 in one session, and activities 4-6 in a separate session).

Materials:

- Copies of the IDEA Quick Guide (included)
- IEP Components document
- Students' current IEP



Teacher activities:

1. *Introduce the lesson.* Say to students:

The goal of this lesson is for you to understand the federal IDEA (Individuals with Disabilities Education Improvement Act) and what is required for your IEP in high school. We will:

- Talk about your rights and what you are entitled to under the law
- Review the different parts of an IEP, as well as your existing IEP, to make sure that you understand what goes into an IEP and how it's used
- Review your IEP/transition planning goals from last year, and think about how those goals worked for you in the past and how they work today.

2. *Distribute and review **IDEA Quick Guide*** (See Appendix). This provides an overview for the student about why IEPs are required, what services and supports they are entitled to, and their rights under Federal law.

-  **Be mindful of the disability focus of IDEA language.** The official language of the IDEA is extremely disability focused. While students preparing for an IEP are those officially identified as having a “disability,” you may have students who are unaware that they are identified as having one of the 13 qualifying disabilities under IDEA. Further, this may not be – and should not be – the primary identity of the student. As you go through the lesson plans with students, it's an opportunity to stress that while this is how the legal language is written, that “disabled” is not their primary identifier. This is especially important for students with ED, who all too often are struggling with negative self-images and lack of confidence.
-  On the other hand willingness and ability to describe having a disability and how it affects you is central to accessing civil rights protections afforded to you by statutes like the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act. It is also critical to acquiring accommodations at the job or in college. So a delicate balance is needed between helping the student to recognize that he/she has challenges or barriers to learning, and that


those barriers are called a disability, but that he/she does not have to perceive oneself as a disabled person. Be sure to use “person first” language stressing that the student has an emotional problem or behavioral challenge rather than referring to him/her as a “sick” or disordered person. You can learn more about person first language from this website: <https://www.mhanational.org/person-centered-language> and the included tipsheet titled “How to Talk About Mental Health”.

Say to students:

Today we will be reviewing some important information about the plan for your education. A set of laws passed over the years assure that students who have difficulty in school get the support they need. The most recent law is called the Individuals with Disabilities Education Act – usually called IDEA . Each of you has a plan created especially for you because of this law. You all have these plans because you qualify to have additional attention paid to how your education will happen. I wanted to take a minute to explain that in this case when the word disability is used it means that students have been recognized to have difficulty in school for one (or more) of thirteen reasons. There are actually descriptions of these thirteen ways that students might have difficulty in school. In the language IDEA uses, these different ways students struggle are described as special health conditions, other health impairments, Autism Spectrum Disorders (ASD), emotional disturbance, speech or language impairments, visual impairments including blindness, deafness, hearing impairments, deaf-blindness, and having multiple disabilities. When students have a hard time in school that matches one of these descriptions, they qualify for this attention to planning their educations which we call an Individual Education Program, or IEP for short. So, when we are talking about planning for your education and the word disability comes up, I want you to remember that the language is based on the IDEA definitions and serves as a measure for whether or not students qualify to receive support.

When thinking about the difficulties that you may have in school it may be useful to think about them as barriers in the road. If you have a have a rough road to bike on, you may need wider tires or lower gears to keep moving. Disabilities are like that; you may need different or other supports to get where you’re going. Many famous people and celebrities today and throughout history have had disabilities but have had great success, President Abraham Lincoln, celebrity Elton John and football player Herschel Walker among them. You can find lists of famous people with mental health and other disabilities on the internet, try: <https://www.disabled-world.com/disability/awareness/famous/mood-disorders.php>. You would be surprised how many people you see every day have “hidden” disabilities. These disabilities don’t show on the outside, but they are real. Ask the people you know if they had problems with school or learning and how they got over these barriers. It may help or inspire you! You are not the only one.


The goal of this lesson is for you to learn about the basics of the Individuals with Disabilities Education Act (IDEA), components of the Individual Education Program (IEP), and about planning components of your IEP and Transition plan. I also want you to know about the ways that you can and should participate in planning for your education and future.

-  Be mindful of confidentiality. When working in a group setting remind students of confidentiality, and that they shouldn’t discuss specifics of others’ IEP with other students. Unlike other disabilities, EDs are often less visible or obvious, and may not be readily apparent

to others. Students must respect the privacy of other students about issues like ED that may be sensitive and personal.

3. *Distribute and review the IEP Components document.* Explain and describe the components of an IEP. For some students this may be the first time they have ever learned about an IEP. As you walk through each section, you should encourage students to ask questions, and prompt students to see if they understand the different IEP components. Components to describe are:

- Present levels of performance
- Measurable annual goals
- How progress will be assessed
- Special Education and related services and supplementary aids and services
- The extent of exclusion from the general student population
- Individual assessment accommodations
- Dates (beginning to end) the current IEP will be in effect
- Transition plan developed beginning at age 16 (or earlier depending on state requirements)

 **Take your time.** For many students, including those with ED, they may have had limited exposure to the contents of their IEP. All too often students are passive participants in the IEP process, and as such they may not be familiar with the ins and outs of their IEP. These may be new concepts and constructs that may take some time to digest, so be sure to allow the time necessary to properly review the IEP and encourage students to ask questions.

4. *Review the key components of IEP in detail.* Give each student a copy of his or her IEP. Give students a chance to review it independently, and then walk through the general components of the IEP. For some students, this may be the first time they've ever read their IEP so they may have lots of questions. You may ask a student to restate what is in the IEP in their own words, or ask them to offer new ideas or suggestions for specific components. Once the student is oriented to all components of the IEP, work with your students to do an in-depth review of two components of their IEP:

- Present levels of performance
- Measurable annual goals (both academic and behavioral)

A review of these components allows students to be able to describe where they are as a learner. This understanding can help a student formulate their goals for their upcoming IEP and the transition plan component.


5. *Discuss students' impressions of the IEP.* Students discuss their impressions of performance and goals with questions that could include:

- Is your level of performance what you thought it would be?
- Is there anything surprising?
- Are there other things you would (or would not) include if you were writing these goals?
 - **Acknowledge behavioral goals.** Students with ED will often have a behavioral goal in their IEP, and sometimes a behavior intervention plan. Discuss with your student that behavior goals may be present in addition to other types of goals, and that behavior goals can be important to supporting the achievement of other goals.
 - **Present data** (as needed). It may be helpful to share evidence (work samples, data sheets, grades, transition assessment results) to help the student articulate their present levels and be able to contribute to the discussion about their annual goals.

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6. *Briefly discuss the next lesson plan – Build-self determination.* End the lesson by acknowledging that learning about all the components of and their legal rights regarding an IEP is a lot to do in one session. Over the next few sessions you'll be continually returning to these ideas, and practicing around what goes in an IEP, what's appropriate, and thinking together about how to make the most out of their IEP. You can also remind students that during their next meeting they will be thinking about their strengths and interests to get ready for preparing their IEP goals.

Additional resources:

1. [“Disclosure...What Is It and Why Is It So Important?” Worksheet](#)
National Collaborative on Workforce and Disability

This worksheet defines disclosure, presents things to consider when deciding whether or not to disclose one's disability, and offers examples of situations in which a student may choose to disclose. This document also includes an activity for students in which they write down descriptions of their needs to help them be prepared to communicate these needs during disclosure conversations.

2. [“Weighing the Advantages and Disadvantages of Disclosure” Worksheet](#)
National Collaborative on Workforce and Disability

This worksheet offers lists detailing some of the advantages and disadvantages of a student disclosing their disability. The worksheet also includes an activity where students are presented with scenarios in which a student may disclose and asked to think about the advantages and disadvantages of disclosure in these scenarios.

3. [“Rights and Responsibilities under the Law” Worksheet](#)
National Collaborative on Workforce and Disability

This worksheet describes the systems and protective laws available to guard students with disabilities against discrimination. It also outlines how these systems and protective laws change when a student leaves high school and enters the “real world”. It is emphasized that after high school, a young person must be able to advocate for themselves to continue receiving needed supports. Several activities are included to reinforce these concepts.

IEP Components

See Appendix L for more information

This document describes the different components of an IEP.

Present levels of performance. This is a statement of a student's present levels of academic achievement and functional performance describing:

- How a student's disability affects the involvement and progress in the general curriculum.
- A description of benchmarks or short-term objectives (for students taking alternate assessments aligned to alternate assessment achievement standards).

Measurable annual goals. This is a statement of measurable goals, including academic and functional goals for:

- Meeting the needs of the student resulting from their disability to enable them to be involved in and make progress in the general curriculum.
- Meet each of a student's other educational needs resulting from their disability.

How progress will be assessed. This is a description of how the student's progress toward annual goals will be measured and when periodic reports about their progress will be provided.

Special Education and related services and supplementary aids and services. This details how services should:

- Be based on peer-reviewed practices to the extent practicable.
- Include a statement of program modifications or supports for school personnel to be provided to the student.
- Ensure that the student has the opportunity to advance appropriately toward reaching goals.
- Be involved in and make progress in the general curriculum and participate in extra-curricular and other non-academic activities.
- Allow students with disabilities to be educated and participate with their peers with and without disabilities.

The extent of exclusion from the general student population. This describes the amount of time students will spend separated from their peers for instruction in the general curriculum and non-academic activities.

Individual assessment accommodations. This describes:

- Any appropriate accommodations that are needed to measure the academic and functional performance of the student.
- If a student cannot participate in state or district-wide assessments and the alternate assessment chosen for the student and why it is appropriate.

Dates (beginning to end) the current IEP will be in effect

- Describing the frequency location and duration of services and modifications.
- Including information for students who are 16 years of age and older about how the student's transition from school to adult life will be supported.

IDEA Quick Guide

What is IDEA???

The Individuals with Disabilities Education Improvement Act (IDEA) is a United States law which says:

- Students like you must have access to a free education which is appropriate for your needs
- Your education must prepare you for the education, employment, and independent living goals you have for after high school.

What are my rights with IDEA

IDEA law promises you 6 things:

1. A free and appropriate public education (FAPE)
2. An invitation for you and your parents to participate in the planning of your education
3. An Individualized Education Program (IEP) designed to help you achieve your goals.
4. A free evaluation to see if you have a disability that has a substantial impact on your learning or behavior, if your teacher thinks you might have a disability
5. The right for your parents (or you if you are legally an adult) to challenge your current educational services
6. As much time in a regular education classroom during school days as possible while still meeting your needs.

Things to know! Important IDEA details

- When you become an adult according to your state's laws (usually sometime between the ages 18 and 21), the right to challenge the educational services you are receiving can be moved from your parents to you. For this to happen, your IEP must say that you have been informed that these rights will be transferred to you at least one year before they are transferred.
- Your educational program must be linked to the general curriculum that all high school students complete. Your IEP must include a description of how you are involved in the high school curriculum.
- You are expected to complete all state- and district-wide testing. You can get modifications and/or accommodations to these tests if you need them. Or, if you are unable to complete these tests, alternate tests will be created for you.
- You should be invited to all IEP meetings about your transition plans for after high school. If you do not go to one of these meetings, your preferences and interests should still be talked about in the meeting.
- Your IEP team must include at least one of your regular education teachers, and this teacher should participate in the development, review, and revision of your IEP.

Lesson 2 – Build self-determination

Building on Lesson Plan #1: Now that students have a better understanding of their IEP and their rights under IDEA they can begin preparing to take a more active role in leading their IEP meetings. The goal of this lesson is for students to consider and identify what they do well, things they like and don't like, and to begin thinking about how their strengths and interests can be part of their IEP/transition plan goals for the coming year. Students will complete worksheets that can help them think about their strengths as well as any challenges they might be concerned about. (See Appendix M for more information)

What will be learned: Identification of what students do well and areas where they need support. Identification of strengths, interests, and needs. The skills that are part of self-determination are also those that are valuable in engaging in/leading their IEP meeting.

Capacities built: *Self-awareness* from identifying needs, interests, strengths, challenges, and values; *Shift the locus of control* by presenting opportunities for students to take beginning steps of more independence.

Time: 45 - 60 minutes

Materials:

- Copies of the Self Determination Student Self-Assessment worksheet
- Copies of the Goal Setting Practice worksheet
- Copies of the Statement of Strengths, Interests, and Needs worksheet
- A set of various colored highlighters, enough for 2 per student


Teacher activities:

1. *Introduce the lesson.* Say to students:

Last time we met we worked on understanding your IEP – with a focus on your performance and goals. We also talked about your rights under the IDEA law. (Students may have additional questions that you can briefly answer at this point regarding the last lesson.)

The goal of this lesson is for you to think about yourself, what you do well, things you like and don't like, and to start thinking about how your strengths and interests can be part of your IEP/transition plan goals for the coming year. We will complete a few worksheets that can help you think about yourself and your strengths as well as any challenges you might be concerned about.

2. *Ask students to complete the **Self Determination Student Self-assessment worksheet**. The purpose of this worksheet is for the student to be able to think about themselves: what they do well, their likes and needs, their understanding of the impact of their ED, their sense of control in their life and decision making, and their understanding of how to set and achieve goals.*

 **Remember that the impact of an ED may be less visible.** Simply knowing a student's ED diagnosis or diagnoses is not enough to know what challenges they face. This is one way ED is distinct from other disabilities (e.g., a mobility disability), where the impact may be more


obvious (e.g., inability to negotiate stairs). You may need to spend time learning from students about their experiences and challenges to best understand the impact of their ED.

3. *Summarize findings from the Self-Determination Self-assessment worksheet.* Have students highlight or otherwise mark items they ranked as “doing always/most of the time” in one color and then have them highlight or otherwise mark the “rarely/never” items in another color or way. Have students circle two or three items from the “sometimes” or “rarely/never” items that represent areas where they would need support.
4. *Have students share what they learned about themselves.* Take turns to share what students identify as “doing always/most of the time” as well as which items they “rarely/never” do. This is a great first step towards thinking about the individual’s strengths as well as areas where they need support.
 - 📘 **Help students identify their strengths.** It is not uncommon for students with ED to have real challenges identifying their own strengths. This may be related to how a student’s ED presents itself symptom-wise (e.g., pervasive negative self-talk) and/or may result from negative experiences with peers, family, or professionals. If a student has difficulty identifying their strengths, you may suggest strengths you see in the student or ask other students to suggest strengths. It can help your students with an ED to hear from others about their strengths. These strengths can be referenced throughout the lesson plans and the student-led IEP meeting.
5. *Ask students to complete the **Goal Setting Practice worksheet** to practice setting a goal.* The purpose of this worksheet is to start to think about what kind of goal a student might be interested in. Using the information from the Self-Determination Self-assessment, ask students to think about a goal they may like to set for the coming year. While this may or may not be a final goal on a student’s IEP, it’s an opportunity to practice thinking about goals in general, and the steps and supports one may need to help reach a goal. This worksheet will ask students to identify a goal and discuss the strategies and supports existing and needed to achieve these. These are important skills as students prepare to lead their IEPs.
 - 📘 **Emphasize developing independence.** Students with ED often have much of the decision-making in their lives done by adults (parents, teachers, doctors, social workers, etc.). For many, behavior challenges that can come with ED may discourage adults in their lives from promoting their independence. This beginning discussion of what students have learned about themselves, their areas of confidence and where development is needed can be the first step towards students understanding their capacities and their ability to perform decision-making. This will in turn increase their confidence and self-determination abilities as well as promote increased feelings of independence.
6. *Ask students to complete the **Statement of Strengths, Interests, and Needs worksheet**.* The purpose of this worksheet is for students to spend some time reflecting on their strengths, interests and needs. This information will serve as the foundation for thinking before and during a student’s IEP meeting with the team about IEP goals. Asking a student to reflect on these questions is also a way for the student to build competence, confidence and identify areas for growth.
 - 📘 **Anticipate and counteract negative messaging.** Students receiving special education services for ED often have experienced discrimination from adults and their peers both in and outside of the school setting. Many students with ED have come to believe the negative messages they

have received from others. Use this opportunity to remind students that they do not need to be defined solely by their disability and diagnosis. Work with students to identify and practice strategies for resisting being labeled, being told and treated like they are not able to do things, or being given the message that people don't expect much from them.

Also, take the opportunity to talk about students in honest (respectful) ways about behavior they have goals about- often these behaviors are the things that others notice and that lead to some of the discriminatory actions. Help them identify more appropriate substitute behaviors for the ones that are causing them problems. If they have behavioral supports in the IEP, this conversation is justified and appropriate to have. Learning more pro-social behaviors is just as important as finding strategies to help with any academic difficulties they may experience.

7. *Have students share what they learned about themselves.* Take turns having students share what they learned about themselves through the Statement of Strengths, Interests, and Needs worksheet.

 **Learn from others who have lived with ED.** Many youth with ED may be overwhelmed and disoriented by not having a clear path for their future as they struggle with challenges that may impact their hopes and desires. Having young or mature adults who lived through high school with an ED, and have found successful pathways, can provide motivation and encouragement for your students. Ask former students who are adults or even older students who have not graduated yet, to come and speak to your students about how they have addressed their ED in their lives and acted to be successful despite challenges. Alternatively, there are videos available on YouTube where people talk about their experiences with ED and strategies to make positive decisions in their lives moving forward.

Learning from others with lived experience may not be as challenging as it might seem- former students, students who are attending adult education to get their diplomas or GEDs may be willing to come in and talk about their difficulties.

8. *Briefly discuss the next lesson plan – Create goals for your IEP.* End the lesson by reminding students of the importance of being able to identify their strengths, interests and needs, and that this – thinking about strengths – can be a challenge for many students, not just those with IEPs. Foreshadow the next meeting and let students know that the next step is to take all this information and start thinking about concrete goals to include in their IEP. Ask students to be thinking about this between now and the next time you meet and come to that meeting with some ideas about what would be achievable goals that meet their strengths, preferences, and needs.

Additional resources:

1. [Goal Plan](#)

I'm Determined – Virginia Department of Education

A graphic to use with students to set goals and strategize about how their goals can be attained. This graphic can be used for post-secondary goals or for shorter-term goals.

2. [My Good Day Plan: Implementation Guide](#)

I'm Determined – Virginia Department of Education

A guide for how a student can achieve a “good day.” A student can think about what usually happens during a “good day” and if those things are happening today. If those things are not happening, a student can identify what needs to be done to make today a “good day” and who can help them achieve a “good

day.” This is a particularly helpful tool to assist students in achieving their behavior goals.

3. Kyle – My Good Day Plan, Sample I
I’m Determined – Virginia Department of Education
A sample ‘My Good Day Plan’ of a high school student.
4. Sarah – My Good Day Plan, Sample II
I’m Determined – Virginia Department of Education
A sample ‘My Good Day Plan’ of a high school student.

Self-Determination Student Self-Assessment

Student Name _____ Date _____

Self-Determination Skills help you to know

Yourself

Your goals

The supports you need to reach your goals

Use the following scale to rate the statements below

3 = almost always/most of the time 2 = sometimes 1 = rarely or never

Rating			
3	2	1	I set goals to get what I want or need.
3	2	1	I make plans for reaching my goal.
3	2	1	I check my progress on how I am doing toward reaching my goals.
3	2	1	I attend my IEP Meetings.
3	2	1	I know the goals listed in my IEP.
3	2	1	I participate in my IEP Meetings.
3	2	1	I know what my disability is and how it affects me.
3	2	1	At school, I can communicate with educators about what I want or need.
3	2	1	At school, educators listen to me when I talk about what I want or need.
3	2	1	At home, I can communicate about what I want or need.
3	2	1	At home, my parents listen to me when I talk about my wants or needs.
3	2	1	I have people in my life that I can ask for help with dealing with my disability.
3	2	1	I ask for help when I need it.
3	2	1	I know what I need, what I like, and what I enjoy doing.
3	2	1	I tell others what I need, what I want, and what I enjoy.
3	2	1	I help to make choices about the supports (social, emotional, behavioral, and educational) supports that I need in school and school-related work environments.
3	2	1	I can describe the difficulties I have due to my disability.

Rating			
3	2	1	I recognize the triggers that lead to difficulty with my disability.
3	2	1	I can make choices to keep from reacting to triggers that cause difficulties for me.
3	2	1	I believe I have control to direct my life.
3	2	1	I take care of my personal needs (clothes, chores, meals, grooming).
3	2	1	I make and maintain friendships with others my age.
3	2	1	I make good choices.
3	2	1	I believe that working hard in school will help me get a good job.

Adapted from 2008 Commonwealth of Virginia Department of Education
 Training and Technical Assistance Centers - I'm Determined Project
 Self-Determination Checklist ~ Student Self-Assessment

Goal Setting Practice

See Appendices
N & O for more
information

One goal that I have for myself is ...

Three things I can do to reach my goals are ...

1

2

3

Ways people around me (teachers, family, friends, etc.) can help support my self-determination. (Check all that apply)

- Help me to take responsibility with my disability
- Give me the freedom to make some choices for myself
- Respect my decisions
- Help me learn from my mistakes
- Understand when I want to try new things
- Suggest different strategies I could use to succeed
- Remind me of my strengths and abilities
- Help me make decisions, know what my options are
- Help me solve problems
- Help me to set and work towards my own goals
- Other: _____

Adapted from 2008 Commonwealth of Virginia Department of Education
Training and Technical Assistance Centers - I'm Determined Project
Self-Determination Checklist ~ Student Self-Assessment

Statement of Strengths, Preferences and Needs Worksheet

Student Name: _____ Date: _____

Knowing your strengths, preferences, interests, and needs can help you make decisions in your life (what kind of job you would like to have, what you like to do for fun, what you want to study in school, etc.) By writing down your strengths, preferences, interests, and needs all on this page will help you with telling others in your support team about yourself quickly and clearly.

My statement of my strengths, my preferences, my interests, and my needs	
<i>My Strengths</i>	<i>My Preferences</i>
What do I do well in school?	When I am trying to do work, do I like it quiet or with noise? Do I like to work alone or in a group?
What do I do well at home or in my community?	What activities or organizations do I enjoy participating in?
What do other people say are my strengths?	What works for me? What helps me be successful?

My statement of my strengths, my preferences, my interests and my needs	
<i>My Interests</i>	<i>My Needs</i>
What do I like to do when I am not at school?	What are accommodations that help me?
What activities or organizations do I enjoy participating in?	How can others help me?
What are my hobbies?	What things are difficult for me?

Lesson 3 – Create goals for your IEP

Building on Lesson Plan #2: Now that students have a better understanding of themselves, what they do well, things they like and don't like, they can begin to think concretely developing goals for their IEP/ transition plans, as informed by their identified strengths, interests and needs.

What will be learned: Students will learn a strategy for creating and working towards their goals. These goals will be the foundation of the IEP meeting. Having students intimately involved in developing their own goals will support the “buy-in” of their goals, and will facilitate student’s involvement/leadership in their actual IEP meeting.

Capacities built: *Self-efficacy* and *self confidence* in the ability to set one’s own goals; *Decision making* in setting goals, considering options, and developing plans. *Self-monitoring* to assess goals and progress over time.

Time: 45 -60 minutes

Materials:

- Copy of student’s IEP to review previous IEP goals (including previous goals from the transition component of the IEP if available) from lesson plan #1
- Completed Strengths, Interests and Needs worksheet from lesson plan #2
- Copies of the Creating SMART Goals Worksheet (included)
- Copies of the Practice Writing SMART Goals worksheet (included)

Teacher Activities:

1. *Introduce the lesson.* Say to students:

Last time we met we worked on working to understand ourselves, including our strengths, interests and what supports we need. We completed some worksheets and practiced setting a goal for ourselves.

The goal of this lesson is to begin to create goals for your transition out of high school to share at your IEP meeting. We want to make sure these goals are related to your strengths and interests and that we have a plan you can follow to achieve them. We must make goals that fit into the areas your IEP must cover (that is education, employment, and independent living). We’ll also discuss how we can monitor your progress towards these goals.

2. *Review the previous year’s IEP goals.* Briefly review student’s IEP from lesson plan 1. Ask the student:
 - Did you like these goals?
 - Do you feel like you achieved these goals?
 - Are these goals you’d like to continue to be a part of your IEP?*see Appendix F for more information
3. *Review the Strengths, Interests and Needs worksheet.* Briefly review the Strengths, Preferences and Needs worksheet from lesson plan 2. Begin discussion of how strengths and interests could be turned into goals. Discuss how these strengths, interests and needs may map onto career and education areas of interest to the student. (You can refer to the TEST companion curriculum, *Incorporating Career and Technical Education (CTE) for Students with Emotional Behavioral Disturbance*, to learn about the process and

strategies to use to include Career and Technical Education in a students' high school career).

- Use positive language. Much of the language and experiences of students with ED can be deficits-based. Make sure that students are thinking about and working from a place of strength.

4. Ask students to complete the **Creating SMART Goals worksheet** to practice designing a robust goal.

The goal of this worksheet is to help students identify goals that are reasonable and attainable. A detailed, well-designed goal has the best chance of being achieved. Using the **Creating SMART Goals worksheet**, walk through an exercise where you work together as a group to create a SMART goal.

SMART goals are those that are:

- **Specific** – What am I going to do? (Who, What, When, Where, Why and How)
- **Measurable** – How will I know I have done it? (What will I measure? How much, how often, etc.)
- **Achievable** – What steps do I need to take to make this happen?
- **Relevant** – How does this relate to my plans and needs? (Is it realistic?)
- **Timely** – When will I have done it?

An example of a SMART goal would be, “Upon graduation, Peter will be able to manage needed medications by scheduling doctor appointments, requesting refills, ordering refills, picking up prescriptions from the pharmacy and using the MediSafe app for tracking medications as prescribed.” This is a SMART goal because it is:

- **Specific** – focuses on Peter’s management of needed medications
- **Measurable** – identified outcomes i.e., were refills ordered? Were prescriptions picked up?
- **Achievable** – concrete steps i.e., using an app to manage medications
- **Relevant** – adhering to a medication schedule is linked to the capacity to achieve IEP/transition planning goals
- **Timely** – upon graduation

As part of the SMART goal exercise, be sure to brainstorm potential barriers and possible solutions to this example goal. This information should be used to complete the final version of the goal.

- **Be concrete.** Students with ED are particularly in need of having expectations be clear and simple. A SMART goals framework is a strategy that is both concrete and manageable.

If you determine that students need more support in preparing their SMART goals, you can use the Practice Writing SMART Goals worksheet to practice setting a goal. The purpose of this worksheet is to start to think about what kind of goal a student might be interested in. While some students may be ready to use the Creating SMART Goals worksheet, others will not be ready and may require more preparatory work before setting actual goals. If this is the case, we suggest that you may want to add meeting time with a student to complete the Practice Writing SMART Goals worksheet, before beginning to set the SMART goals that will become part of the IEP.

5. Write one to three SMART goals that would be appropriate for a student’s IEP. Once the example is completed as a small group, help students to each write one to three personal SMART goals on their worksheet.

- **Build confidence.** Students with ED often struggle with feeling confident in their abilities. Emphasize the importance of creating a shorter-term, more easily achievable goal. This is a nice way to build confidence in students with ED, by creating opportunities for success.

6. *Discuss the goals as a group.* Ask students to share their goals with the group.
 - 1 **Provide constructive feedback.** For students with ED just as goals need to be simple and concrete, so does feedback. Providing a laundry list of what does not work about a goal can be unhelpful and overwhelming, and can trigger emotions that discourage individuals from trying new things and working towards their goals. Model for and encourage students to be concrete and constructive in their feedback. For example, “I like that you’ve prioritized wanting to get a job in the hospitality industry when you graduate. That sounds like a great and achievable goal. I noticed you have not talked about how you might pay for that – is that something you should identify as a barrier? Should we talk about potential solutions to that problem?”
7. *Briefly discuss the next lesson plan – Preparing to lead your IEP.* End the lesson by acknowledging the huge accomplishment of identifying IEP goals, and remind students that their contributions and ideas will be the foundation of their upcoming IEP meeting. Suggest to students that they think about the goals they identified between now and the next time you meet and that it is possible to change these goals before the IEP. Remind students that at the next meeting you will be preparing to actively participate in and/or lead their IEP meeting.

Creating SMART Goals

Use this worksheet to practice writing a SMART goal, and to draft your own SMART goals for your IEP. Remember, SMART goals should be:

- **Specific** – What am I going to do?
- **Measurable** – How will I know I have done it?
- **Achievable** – What steps do I need to take to make this happen?
- **Relevant** – How does this relate to my plans and needs?
- **Timely** – When will I have done it?

GOAL EXAMPLE

Draft Goal Example:	
Specific - What I am going to do?	
Measurable - How will I know I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal Example:	

GOAL 1

Draft Goal 1:	
Specific - What I am going to do?	
Measurable - How will I know if I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time-bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal #1:	

GOAL 2

Draft Goal 2:	
Specific - What I am going to do?	
Measurable - How will I know if I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time-bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal #2:	

GOAL 3

Draft Goal 3:	
Specific - What I am going to do?	
Measurable - How will I know if I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time-bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal #3:	

Practice Writing SMART Goals

Still having a hard time coming up with a goal for your IEP? Use one of these questions to “jump-start” your thinking about a goal:

- What is something you want to accomplish soon (the next 3-6 months)?
- What goal from your IEP is something you think would be somewhat of a challenge, but great to accomplish?
- What is something you want to be able to accomplish by the time you graduate?
- What is something that you think would be helpful to be able to know to do for a future job?
- What is something you are already good at but want to take it up a notch and do even better?
- What is something that you would like to do to help grow in your ability to take responsibility for your own choices, decisions, or problem-solving?
- What learning or study strategy would you like to work on?

First, just write out your goal idea (or answer the question above), in your own words. Then start making your goal into a SMART goal by answering the following questions.

1. Write the general idea for your goal here, in your own words:

2. Now, turn your goal into a SMART goal by asking yourself:
 - a. Is my goal SPECIFIC? – Does it tell what I want to be able to do, see, hear, or accomplish in specific terms?
 - If your goal isn't specific, make it more specific by writing a definite statement about what actions you will take to do your goal.
 - b. Is my goal MEASURABLE? – How will anyone be able to know I have done my goal? What will I use to be able to keep track of what I am going to do?
 - If your goal isn't measurable, make it more measurable by putting some numbers to it (for example, once a day, every month, each week, etc.).
 - c. Is my goal ACHIEVABLE? – Is this something I will be able to do? Will I need help, supplies, or any other steps in order to do my goal?
 - If your goal isn't achievable, make it more achievable by making sure it is the next step that needs to happen to reach your goal. (HINT: If you need to do something else first, that's a good indication that another step should be your goal first!)

- d. Is my goal RELEVANT? – How does this relate to my IEP or overall plans for the near term or the short-term?
 - If your goal isn't relevant, make it more relevant by making sure it is realistic and in line with what you need to accomplish.
- e. Is my goal TIMELY? – When will I expect to accomplish this goal?
 - If your goal isn't timely, make it more time-bound by stating when or how often you expect to accomplish your goal (for example, by the time I graduate, my first summer after graduation, next fall, etc.).

Now gather each of the pieces of your goal and write it as a single sentence SMART goal here. You may need to write several versions of your goal sentence several times until you get it just right.

Lesson 4 – Preparing to lead your IEP

Building on Lesson Plan #3: Students will now have a draft list of IEP goals that they can bring to their IEP meetings. These goals will be Specific, Measurable, Achievable, Relevant and Timely (SMART). With this base, you can now begin working with students to prepare for their leadership/active participation in their upcoming IEP meeting.

What will be learned: Students will walk through the actual steps of the IEP and think about how they want to participate in/lead the IEP meeting.

Capacities built: *Self Advocacy to communicate wants and needs and conduct one's affairs; Adjustment to be able to moderate strategies to improve performance; Independent Performance to be able to use self-management strategies and follow through on tasks, and decision-making to consider options and develop plans.*

Time: 45 -60 minutes

Materials:



- Preparing for My IEP worksheet

Teacher Activities:

1. *Introduce the lesson.* Say to students:

Last time we met we worked on our SMART goals. If you remember, SMART stands for Specific, Measurable, Achievable, Relevant and Timely. SMART are goals that are more reasonable for you to do and are more achievable. There is little use in setting goals that are impossible to meet – using SMART goals is one strategy to make sure we set goals that are right for you.

The goal of this lesson is to start preparing for the actual IEP meeting. For some of you, this may be your first IEP meeting. For others, you may have attended IEP meetings previously. Given the importance of this meeting, and knowing that it only happens once a year, it's a good idea to prepare together for this meeting. We'll also want to start thinking together about how you can participate and/or lead parts of the IEP meeting.

-  **Be strengths-based.** As noted earlier, students can internalize the identity of “being disabled.” This is particularly true for students with EDs, where their challenges may be more hidden and their impact may be less apparent. Emphasize the IEP as an opportunity to identify and plan for what's important to the student and remind students that their IEP team members are there to help.
2. *Walk through the steps of what happens before and during an IEP meeting.* The purpose here is to walk through the steps of what needs to happen to prepare for the meeting, as well as what happens during the actual meeting. By discussing this with your student ahead of time it will allow everyone to be on the same page in terms of knowing what to expect. Use the **Preparing for My IEP** worksheet and walk through each “Activity” to highlight each step of the process.
 -  **Preparation is key.** Students with ED, like many students, do better when they know what to expect. Knowing what to expect from any situation – particularly a meeting as important as the IEP – can go a long way toward alleviating feelings of anxiety and anxiousness that may present for students with ED.

3. *Review the ways students can participate/lead their IEP.* This is an opportune time to remind students, as you've likely been doing throughout these lesson plans, of the importance of student engagement and/or leadership during the IEP meeting itself. You can refer back to earlier parts of this curriculum that discuss the value of having students more involved/leading their IEPs, and the benefits to students in doing so, e.g., better rate of working and going to school, feelings of accomplishment, practice for other adult situations where you have to advocate for your own goals, etc. Use the **Preparing for My IEP** worksheet and walk through the "Person Responsible" column to review the range of options.
 - 📘 **Ask students to stretch themselves.** Students with ED often have less choice and control of their life choices than their non-ED identified peers. As such, they can become complacent and accustomed to others making decisions for them and taking the lead on activities that are about planning for their future. Getting concrete about how students are going to be engaged and/or lead their IEP is a wonderful opportunity to break that cycle of complacency, and get students re-engaged in planning for their future. You will know these students better than many, particularly their strengths and what they struggle with. When reading through the "Person Responsible" column, be mindful of what students are good at and could easily do, and what would be a small to medium stretch for them to accomplish. We encourage that each student have at least 1-2 stretch activities built on top of what they already do well, as an opportunity to practice new skills, and demonstrate their capacities.
4. *Identify how students will be engaged and/or leading their IEP.* Ask students to begin completing the **Preparing for My IEP** worksheet by starting with the "Person Responsible" column. You'll see there are some suggested options for completing these. Use these categories or create your own. The goal here is to a) create clarity about who will be doing what to prepare for and during the IEP meeting and b) to remind students that regardless of how much leadership they assume in planning and implementing the IEP meeting, that you continue to be engaged as an active support person.
 - 📘 **Be concrete about what students can do well.** Students with ED often are not used to thinking about what they do well. A key part of your role is to remind them of their strengths and to think concretely about which of the activities listed to prepare for your IEP would build on their strengths, as well as which would stretch a strength that they have, or begin to build a new one.
5. *Make a plan and timeline for the IEP preparation activities.* Now that you've identified what needs to happen for the IEP, and who is going to do what, it's time to begin to plan the actual IEP meeting. Practicing what happens during the IEP will happen in the next lesson, but there are other concrete activities (e.g., picking an IEP date, inviting participants) that can start at any time. Work with your

Time Management

All students, regardless of having and ED, can benefit by developing essential time management skills. Begin by creating a calendar and discussing deadlines for major tasks. Once a deadline is confirmed, the calendar will be useful as the student keeps track of those important dates and allow them to plan ahead to reach their goals. You and the student can then work together to break down their time on major tasks into smaller, more manageable chunks to be added to the calendar. As important as time management is, it should not be rushed into. Students who are preparing to lead their IEP might feel overwhelmed and/or intimidated by the process, therefore extra support may be needed as this skill is being developed so as not to cause added stress. As the student **becomes more comfortable with this time management process, additional task deadlines can be added into a student's calendar.**

student to complete the “Notes” column of the **Preparing for My IEP** worksheet to begin work on who to invite, a date, sending invitations, and preparing how to present the IEP (PowerPoint, handouts, etc.), as well as what will happen during the actual IEP meeting. For the activities that happen during the IEP meeting, you and your student may decide to create a PowerPoint or use some other technology to identify the steps.

6. *Briefly discuss the next lesson plan – Practice participating in/leading your IEP.* Remind students that they’re getting close to their actual IEP meeting. Congratulate them for all the work they’ve done up to this point, and for having done much of the preparation for the IEP – they’re almost there! Now it is about practicing and preparing for the actual IEP, and that’s what the remaining lesson will focus on.

Additional resources:

1. [Self-Directed IEP Student Workbook, 3rd Edition](#)
Martin, J.E., Marshall, L.H., Maxson, L. & Jerman, P. (2016).
Choicemaker Instructional Series

This workbook provides a step-by-step guide for actively engaging students in the development and implementation of their IEPs.

Preparing for my IEP

What needs to happen before the IEP meeting

See Appendices
N & O for more
information

Activity	Person responsible (student, teacher, both)	Notes
Select date for the IEP meeting		Date and time for the IEP Meeting:
Identify IEP meeting participants (e.g., parents, teachers, adult agency representatives, other supports)		Who should come to my IEP meeting?
Invite IEP meeting participants		How will participants be invited?
Secure room for IEP meeting		Where will the IEP be held? Is the room reserved for the date and time needed?
Prepare portfolio/materials for the meeting (e.g., PowerPoints, handouts)		What materials are needed? How many copies?
Other not listed above		As I think about the IEP meeting is there anything I haven't thought about that I need to be prepared?

What happens during the IEP meeting

Activity	Person responsible (student, teacher, both)	Notes
1. State the purpose of the meeting		The purpose of this meeting is to...
2. Introduce everyone		I would like to introduce everyone [OR I would like for everyone to introduce yourself and tell your role]...
3. Review past IEP goals and performance		First, we will look at my IEP goals and performance. Please turn to page ____ or look at the screen...
4. Ask for feedback from others		Now I invite you to make any comments or suggestions about what we have reviewed...
5. State your proposed IEP and transition goals		Here is a goal that I propose for IEP and transition... Then share any other goals you have prepared.

Adapted from: Martin, J. E., Marshall, L. H., Maxson, L., & Jerman, P. (2016). *Self-Directed IEP: Teacher's Manual* (3rd ed.)

What happens during the IEP meeting

Activity	Person responsible (student, teacher, both)	Notes
6. State what support you'll need		Based on this goal/these goals, I believe I will need the following supports to help me reach them...
7. Ask for feedback from others		Now I invite you to make any comments or suggestions about what I've shared...
8. Summarize your goals and what was happened at the meeting		To summarize, we have discussed my goal(s) and made the following decisions...
9. Thank everyone for attending		Thank you for attending my IEP meeting!

Lesson 5 – Practice leading your IEP

Building on Lesson Plan #4: Now it's time to practice. Throughout the previous 4 lessons, students have learned about their IEP and their legal rights to supports and accommodations. They have completed exercises to work on their self-determination, and have identified their strengths, interests, and needs. They have learned how to set SMART goals and started to think about how they want to be actively engaged during their IEP meeting. All of this work is the foundation for the actual IEP meeting. The skills learned in previous lessons, and the preparations leading up to the IEP, will all contribute to a more engaged and hopefully productive IEP meeting.

What will be learned: Students will practice the activities they identified during the previous lesson to facilitate their participation/leadership of the IEP meeting.

Capacities built: *Independent Performance* to be able to perform tasks to standard and follow through on one's plans and *Adjust* to change strategies to improve performance.

Time: 45 -60 minutes

Materials:

- Any materials that will be used during the IEP meeting (e.g., PowerPoint, handouts, talking points)
- Completed Preparing for my IEP worksheet (from lesson 4)
- Copies of the Leading My IEP worksheet (included)

Introducing the lesson: Now it's time to practice.


Teacher Activities:

1. *Introduce the lesson.* Say to students:

Last time we met we talked about how to prepare for the actual IEP meeting. We made some decisions about how we were going to work together to prepare for the meeting (e.g., who is sending out invitations, who is reserving the meeting room). We also made some decisions about who would lead each part of the actual IEP meeting.

The goal of this lesson is to practice and get ready for the actual IEP meeting. You have done all the hard work leading up to and preparing for the IEP, so now we're going to focus on practicing, and getting comfortable for the actual day.

2. *Give a pep talk!* Students may understandably be nervous about their IEP but may not identify this feeling. Remind students that it is ok and natural to have these feelings and remember that there are things you can do to create a supportive environment during the IEP. Part of this is about preparing for the meeting, which you've been doing together over the last few months. There are also things such as thinking about the physical environment (e.g., the layout of the chairs) that you can address, all to help the student feel as comfortable and at ease as possible.

-  **Identify triggers or stressors.** Oftentimes symptoms of a student's ED can be exacerbated by triggers that can lead to heightened anxiety, agitation, or depressive symptoms. Triggers can include encountering something unexpected or being put in a situation where a student feels unprepared or uncomfortable. This could include practicing and role-playing the IEP meeting. Be mindful of what you know about a student and try as much as possible to create

an environment where the student has the best chance of succeeding.

3. *Roleplay for your students the steps of an IEP meeting.* It can often be helpful to watch someone else roleplay actively participating in/leading an IEP before trying to do it oneself. Roleplays can happen with former students (see below) or other teachers.
 - 📘 **Model what leading an IEP looks like.** Find a current or former student, preferably one with an ED themselves, who is willing to role play what leading the IEP process can look like, and talk with students about their experiences of this. These students can also provide strategies to your current students about what helped them to prepare for the IEP, including strategies that specifically helped them address issues and/or concerns specific to their ED.
4. *Review the completed *Preparing for my IEP worksheet*.* Take time for a quick review of the worksheet to revisit what you decided during the previous lesson regarding which portions of the meeting the student is going to lead. Check in again with students to make sure this is still accurate, and then get to work.
5. *Complete the *Leading My IEP Meeting worksheet*.* You will need to decide with your student how you'd like to present information in your IEP. Some students prefer to use technology and create a PowerPoint. Some may want to write notes and have an outline of the steps as well as what they'd like to say. Some may prefer to use note cards. What method you use is a choice for you and your student. We've included the **Leading My IEP Meeting** worksheet in this lesson plan as an option. It is a blank template your student can use as a roadmap for the IEP meeting, to remind them of who is doing what, how much time you have for each section, to keep notes, etc.
6. *Take turns practicing for the IEP meeting.* So now it's time to start. A few hints that can help.
 - ✓ It can help to have more confident students go first – ones who are more natural leaders. This can set a positive tone for the other students to emulate.
 - ✓ Provide positive verbal feedback and encourage the same from other students. If there are constructive critiques, be mindful of how to relay these in ways that fit with that student's strengths and challenges.
 - ✓ Be aware of your non-verbal cues, including having "open" body language e.g., sitting upright and facing your student, not having your arms crossed.
 - ✓ You may want to videotape sessions and review together as a group or one-on-one, to celebrate what the student does well as well as see if there are areas for improvement.
7. *Personalize IEP preparation.* You'll need to work with your students to determine how much preparation is needed to support them in participating in/leading their IEP meetings.
 - 📘 **Some students will need more opportunities to practice.** Anxiety and sensitivity to stressors are very common among students with ED. Anticipate that there are students who will need additional time to prepare, and this is ok. The goal is not how quickly you and your students can work through the lesson plans, but rather how comfortable and confident your students can be as they participate/lead their IEP.

Additional resources:

1. “Using Technology to Enhance Student Presentations” Webinar
Communicating Interagency Relationships and Collaborative Linkages for Exceptional Students (CIRCLES)

A short webinar (approximately 12 minutes) about web-based tools (e.g., www.animoto.com, www.toondoo.com) students can use when preparing presentations for their transition planning meetings. The utilization of these tools can help alleviate anxiety about speaking in front of a group, and make the transition planning meeting more exciting and engaging.

▲ Success Story

Respondent started by saying the training for the TEST protocols in August was one of the best trainings that they had been to in a long, long time.

“*The materials were so well-developed and put together, the presentation was amazing. I’m actually looking at all three of the little binders, right here... I keep them handy because I sometimes refer to them and oftentimes need them.*”

The school has a significant population of students with emotional disabilities that are receiving IEP services. They had five people go to the training and three are still there, but only two are actual service providers.

“*It’s been tough in many ways, because I was so excited about all this stuff, but we didn’t do a great job of rolling it out in the most robust way that we could have. Both of the teachers that attended have moved on to other jobs, which is, unfortunately, not uncommon. They were working more on the Career and Technical Education piece.*”

“*I decided, because of my relationship with some of my kids, that I was going to work on the Student-Led IEP component. I will say that the guidelines and the templates and the protocols in this booklet were amazing and I was literally able to sit down with this student who never thought they would be able to pull this off, but were willing to give it a shot. We essentially spent about 8 weeks going through each of the steps that were laid out in the process and helped the student identify all of their goals and objectives. Then we did a mock run-through of the IEP meeting.*”

“*When we got to the meeting itself we were all emotional. I just said “OK, it’s all yours!” and it was so perfect, they just went right through it and did a great job. Their parent was, I think, completely blown away that this student had grown to the level to be able to do this.” Over the next 18 months, the student successfully pursued post-secondary training and is now holding a job.*”

Fall 2020: Respondent has spoken with a new teacher in emotional behavior classroom, who came in the middle of last year as the other two teachers were leaving. Has talked with the teacher about the

protocols TEST has developed and suggested one of the simple things is to get them to all be in charge of their own IEPs. The teacher said “I have wanted to do that forever! It’s their IEP, it’s not our IEP, they should be doing that.” Respondent is trying to figure out, without overwhelming, how to tease out pieces of all three of the areas, and see if they can integrate some of the curriculum that TEST has already developed into their classroom.

The respondent would love to hear stories from some of the other school districts that have used components of this, to possibly get best practice options.

“ I’m not aware that there was ever a group in Maine, there may have been. They had the consult calls, but those were not available to a lot of us, because it seems like they were always right at the time of day when there were always IEP meetings scheduled. One of the team members could go be part of the conversation but the rest couldn’t, and you never get really good information when one person is reporting out what happened. So, I feel like we dropped the ball, and the ball got dropped a little bit, with just not being able to be consistent in the follow through piece. But I have carried this around, I had this at home all summer when we were doing remote work, and I love these protocols!”

Leading My IEP Meeting

See Appendix M for more information

Activity #1	Person Responsible	Time Allotted
State the purpose of the meeting		

The purpose of the meeting is to ...

Activity #2	Person Responsible	Time Allotted
Introduce everyone		

I would like to introduce everyone [OR I would like for everyone to introduce yourself and tell your role] ...

Activity #3	Person Responsible	Time Allotted
Review past IEP goals and performance		

First, we will look at my IEP goals and performance. Please turn to page or look at the screen...

Activity #4	Person Responsible	Time Allotted
Ask for feedback from others		

Now I invite you to make any comments or suggestions about what we've reviewed...

Activity #5	Person Responsible	Time Allotted
State your proposed IEP and transition goals		

Here is a goal that I propose for IEP and transition... Then share any other goals you have prepared.

Activity #6	Person Responsible	Time Allotted
State what support you'll need		

Based on this goal/these goals, I believe I will need the following supports to help me reach them...

Activity #7	Person Responsible	Time Allotted
Ask for feedback from others		

Now I invite you to make any comments or suggestions about what I've shared...

Activity #8	Person Responsible	Time Allotted
Summarize your goals and what has happened at the meeting		

To summarize, we have discussed my goal(s) and made the following decisions...

Activity #9	Person Responsible	Time Allotted
Thank everyone for attending		

Thank you for attending my IEP meeting!

III. RUNNING THE STUDENT-LED IEP MEETING FOR STUDENTS WITH ED

- ✓ **Considerations for your students the day of the IEP**
- ✓ **What happens during the meeting**
- ✓ **What happens after the meeting**
- ✓ **Measure outcomes/impact of student-led IEP**

III. RUNNING THE STUDENT-LED IEP MEETING FOR STUDENTS WITH ED

Together, you and your students have worked hard to prepare them to actively participate in/lead an IEP meeting. The next step is putting that preparation into practice during the IEP meeting. Considerations for how to do this are described in this section.

Considerations for your student the day of the IEP

Listed below are some considerations for you to be mindful of the day of the IEP. These are particularly relevant for students with ED, who may require additional effort to ensure that the meeting runs smoothly and as rehearsed.

- **Anticipate contextual factors that may derail the meeting.** Anticipate and attend to possible environmental or contextual factors that may cause the student to get “off track” and contribute to the meeting not going as planned.
- **Take it easy the day of.** Plan low-key activities and instruction before the meeting to be such that the student does not experience elevated stress due to new task demands.
- **Plan a day that is interesting to the student.** If possible, avoid engaging in low preference activities with the student before the meeting that may create conflict.
- **Get support from friends.** Enlist other students in the classroom (if self-contained) to encourage and support the student conducting the meeting that day.
- **Inviting others.** Students should have the opportunity to invite other individuals who support them. This could be a guidance counselor or their favorite teacher.

What happens during the meeting?

A student-led IEP meeting will follow the same pattern as any IEP meeting. With the preparation you and your student have done ahead of time to incorporate student involvement, it should be an uncomplicated process. Your student can facilitate the meeting to the extent to which you and your student have prepared – again, the level of facilitation will vary based on a student’s comfort level and abilities. A few strategies that can be helpful to consider during the actual student-led IEP include:

- **Coming prepared.** Students should be reminded to write down any questions that come up and to ask for clarification if they need it. Making room in the meeting will help students take a moment to reorganize without the stress of making the step to ask for a small break.
- **Be early.** Make sure you and your student arrive at the meeting at least 15 minutes early to be able to acclimate to the room, and arrange chairs and other equipment as desired. This will also give your student a moment to pause before the beginning of the meeting, and to prepare his/her thoughts.
- **Set expectations for student role in the IEP meeting.** As part of the introductions, be sure that the student identifies for the group the leadership role he/she will be playing during the meeting. This will set the expectation and tone for the meeting, and will avoid any confusion if this meeting appears different from previous IEP meetings.
- **Model strengths-based communication.** It’s important to set a positive tone for the meeting, and to help participants focus on the student as an individual rather than as a “case or client.” Traditionally, the language around disabilities including ED has focused on what people are unable to do, or their barriers. In more recent years there is an emphasis on strengths-based communication, and focusing on the individual’s capacities and what they do well. We strongly encourage you to be mindful of being strengths-based during this meeting. This can be explicit in modeling language or how you frame issues. It can also be more subtle, for example ensuring that the voice of your student is always asked for and heard. As the educator who has worked most closely with your student on their IEP, you have

a wonderful opportunity to model this strengths-based communication approach, so that others can learn from your example.

- **Be an active partner with your students.** Once the meeting has started, you as an educator can act as a facilitator to keep the meeting going and work with the student to guide the meeting process as you and the student have previously discussed and practiced. You can judge when the student needs you to jump in to assist, and when you can let your student lead the way. You can use your presence to help everyone stay focused on the IEP and transition plan goals.
- **Have an identified note taker.** It is a good idea to have a member of the team designated as the note taker. This helps to ensure that the meeting is staying on track, that everyone has the same understanding of the plans being made for activities, resources, and services and supports.
- **Document any changes to the IEP.** Any changes or modifications to the IEP must be added to the document for everyone to sign. If this cannot be done while all participants are still at the school on the day of the meeting, the signatures will need to be collected before the IEP is in effect.
- **Summarize and celebrate.** Too often we don't take time to reflect on big accomplishments or to celebrate achievements. Completing an IEP, especially if a student has taken a more active and/or leadership role, is one of those times. Acknowledge this work and congratulate and thank everyone for their participation, especially your student. This positive messaging is particularly important for students with ED, as they may receive a few positive messages about their accomplishments and achievements.

What happens after the meeting?

Students should read and review their new proposed IEP with their transition educator. Reviewing the new IEP will provide the opportunity to clarify anything that was missed or was not clear to the student and/or other individuals that were involved in the meeting.

Measure the outcomes/impact of student-led IEP

Once the student led IEP is complete, you can measure your student's satisfaction with the IEP itself, as well as the process of leading their IEP. Your student can complete the **Student-Led IEP Experience and Satisfaction** worksheet after the IEP meeting. Make sure when you next meet with your student you take time to discuss how the IEP meeting went. Together, you can review the completed **Student-Led IEP Experience and Satisfaction** worksheet, and talk about what worked well during the IEP, and areas where there could be an improvement. These findings can both a) help as you prepare other students to lead their IEPs and b) help your work with this specific student, if they have additional IEP meetings in the coming years.

After the IEP is completed be sure to show the student the outcomes of the work and congratulate him/her on working on this important plan for their success at school. Follow-up meeting with the student to discuss how the IEP is going and to monitor progress will reinforce the value of the IEP and can strengthen the learning process.

Student-Led IEP Experience and Satisfaction

When preparing for my IEP on _____, I had an active role in:

Activity	Yes/No	Notes
Selecting a date for the IEP meeting	Yes/No	
Identifying IEP meeting participants (e.g., parents, teachers, adult agency representatives, other supports)	Yes/No	
Inviting IEP meeting participants	Yes/No	
Securing the room for IEP meeting	Yes/No	
Preparing a portfolio of relevant materials for IEP	Yes/No	
Preparing materials for the meeting (e.g., PowerPoint, handouts)	Yes/No	
Other not listed above	Yes/No	

During my IEP meeting I had an active role in:

Activity	Yes/No	Notes
Stating the purpose of the meeting	Yes/No	
Introducing everyone	Yes/No	
Reviewing past IEP goals and performance	Yes/No	
Asking for feedback from others	Yes/No	
Stating my proposed IEP and transition goals	Yes/No	
Stating what support I needed	Yes/No	
Asking for feedback from others	Yes/No	
Summarizing my goals and what happened at the meeting	Yes/No	
Thanking everyone for attending	Yes/No	

During my IEP meeting:

Activity	Yes/No	Notes
I was comfortable leading/actively participating in my IEP	Yes/No	
I felt like my concerns were addressed at my IEP	Yes/No	
I felt like I participated in selecting my goals	Yes/No	
I felt like the accommodations chosen are appropriate for my needs	Yes/No	

Future IEP meetings:

Activity	Yes/No	Notes
I would like to see some parts of my IEP meeting changed or done differently for next year	Yes/No	

IV. Implementation Guide

- ✓ Determine which Student You are Targeting
- ✓ Develop an Implementation Plan
- ✓ Building Buy In
- ✓ Readiness
- ✓ Logistics
- ✓ Training and Coaching
- ✓ Ready, Set, Go!
- ✓ Evaluate

IV. Implementation Guide

Before embarking on *Supporting Student-Led Transition Planning for Students with Emotional Disturbance*, you should complete certain steps to ensure a successful process. If you are reading this Guide, you are likely planning to coordinate or “facilitate” the Guide’s use, or you will actually be serving as an “interventionist” directly working with students. Whether facilitating or intervening, it is suggested that the “implementer” (counselor, teacher, transition coordinator, administrator) who has determined to use this resource do the following:

1. Determine which Student You are Targeting

You may have looked at your data regarding the students in your school and determined that you want to target this intervention with 12th graders, or incoming freshmen, or all students with emotional or behavior disturbance (ED) served by a specific case manager or transition coordinator or educator. You may have determined with your colleagues that this is a new way of engaging with all students with disabilities and will implement the guide full-scale across your school, or even your school district. However, you intend to proceed, it will help to think through some possible barriers and align your allies in implementing the work.

2. Develop an Implementation Plan

As you consider activities and associated components (see the chart below), it may be useful to skim the sections that follow this chart on buy-in, readiness, and logistics. The content in these sections may help you and your colleagues plan steps that otherwise might be overlooked. This is a good time to review Tables 2 and 3 in Section I of this Guide regarding “Barriers” and “Strategies”.

Below is a chart which may be useful as you organize your resources to facilitate a student-led IEP development process in your school or program.

Sample Implementation Plan

Names of Team Members (includes those who help implement the work, school/distract/agency partner staff, youth leaders or parents involved in the initiative):
 Sarah Stalwart, Jeremiah Jacobs, Ann Armstrong, Belinda Bryce, Carl Childers, Donovan Diaz, Erika Estevan

Start Date	Activity	Person(s) Responsible (names)	Materials Needed?	What Documentation is Expected?	Anticipated Completion Date	Differentiation for Students in Varied Settings
11/15/20	Prepare for training meeting implementation team: <ul style="list-style-type: none"> • Schedule space & time • Complete readiness questions • Invite lead special education teacher from each pod • Share email or letter overviewing purpose • Have conversations with each invited teacher (build buy-in) 	Sarah Stalwart (asst. principal) Jeremiah Jacobs (transition coordinator)	NA	Training meeting invitation	12/1/20	NA
12/1/20	Conduct training meeting: <ul style="list-style-type: none"> • Present rationale • Explain selection of initial implementation team (garner buy-in) • Walk through guide • Respond to questions • Assign "homework" (see teacher implementation plan @ end of Guide) 	Jeremiah Jacobs (transition coordinator)	Supporting Student-Led Transition Planning for Students with Emotional Disturbance (Guide) PowerPoints of handouts highlighting specific parts, as needed Teacher Implementation Plan copies Chart paper, post-its	Meeting attendance List of upcoming IEP reviews (with dates) for spring semester	12/1/2020	Discuss during guide review
12/2-12/5	Collect individual checklists (for planning)	Initial implementation teachers: <ul style="list-style-type: none"> • Ann Armstrong • Belinda Bryce • Carl Childers • Donovan Diaz • Erika Estevan 		Completed Teacher Implementation Plans	12/5/2020	Should be evidence in checklists for planning

Start Date	Activity	Person(s) Responsible (names)	Materials Needed?	What Documentation is Expected?	Anticipated Completion Date	Differentiation for Students in Varied Settings
12/5 – 12/15/20	Review and revise teacher implementation plans	Sarah Stalwart (asst. principal) Jeremiah Jacobs (transition coordinator) 1 implementation teacher volunteer		Finalized teacher plans	12/16/2020	Pacing of lessons reflected in teacher plans
12/16/20	Planning Meeting: <ul style="list-style-type: none"> Confirm spring calendar for guide implementation Any supplemental materials needed? Schedule coaching pairs & whole group coaching meetings for late January and every 2 -4 weeks through April 	Sarah, Jeremiah, Ann, Belinda, Carl, Donovan, Erika and paraprofessionals as appropriate	Chart Paper & Markers Full calendar from individual teacher plans (handout) Coaching pairs assigned (each teacher will observe and be observed at least twice [once by a fellow teacher and once by Sarah or Jeremiah])	Spring calendar: <ul style="list-style-type: none"> Teaching schedule Observation schedule Meeting schedule IEP Meeting schedule 	12/16/2020	
1/8/2021	Implement Instruction <ul style="list-style-type: none"> Follow Teacher Plans & Guide Conduct observations Conduct planning meetings (combine suggested coaching and team planning agendas) 	Jeremiah (oversee and support) Ann, Belinda, Carl, Donovan, Erika and paraprofessionals as appropriate	Guide with copies of necessary worksheets Copy of students' IEPs Teacher Implementation Plans to be used during observations	<ul style="list-style-type: none"> Student work Observation notes Team Planning notes Completed Implementation Checklists* 	4/30/2021	
1/8/2021	Conduct student-led IEP meetings	IEP team meeting coordinators		<ul style="list-style-type: none"> IEP Participation Rating Form* Parent Survey* Student Satisfaction* 	4/30/2021	Varied types of participation, depending on student

Start Date	Activity	Person(s) Responsible (names)	Materials Needed?	What Documentation is Expected?	Anticipated Completion Date	Differentiation for Students in Varied Settings
1/10/2021	Evaluation data collected	Jeremiah	Survey of implementation teachers	<ul style="list-style-type: none"> Rating forms and surveys compiled Completion of "Readiness" measure after final IEP meeting 	5/10/2021	
5/15/21	Debrief meeting: <ul style="list-style-type: none"> Invite participants Share evaluation results Invite additional feedback on pros, cons, next steps for whole school implementation in 2021/2022 	Sarah, Jeremiah, Ann, Belinda, Carl, Donovan, Erika, and other names, as appropriate willing parents willing students	Compiled evaluation data Agenda for meeting	<ul style="list-style-type: none"> Notes from meeting Tentative schedule for fall implementation 	5/17/2021	

* forms within lessons or at end of Guide (don't need to create)

3. Building Buy In

You are planning to engage students and their IEP teams in a more student-led process because you understand the importance of this. You have done the research and understand the rationale presented in the Guide to know that students with higher levels of self-determination are more likely to succeed in school and after high school. You know that participation and leadership in the IEP development process is a tangible mechanism for teaching and developing many of the component skills of self-determination such as goal setting and attainment, problem solving, and self-advocacy. Do other stakeholders understand the importance of this effort?

These meetings may take more time. Will your school administration support this? Student involvement requires that parents (of students younger than 18) accept the idea of the student attending the IEP meeting and reviewing a copy of their IEP. How will you communicate about this new effort with parents? Often students with ED and other disabilities have full course schedules of rigorous academic courses, with little time for instruction on anything additional. Reviewing Section I of this guide should provide you with some snippets to share with other stakeholders to ensure their support of *Supporting Student-Led Transition Planning for Students with Emotional Disturbance*.

With any new intervention or initiative, it is critical to identify allies or champions of the work. As you and your team complete your implementation plan, consider which teachers or counselors are likely to be most receptive to *Supporting Student-Led Transition Planning for Students with Emotional Disturbance* and bring them on board to assist in planning. Individuals with intimate knowledge of students' schedules and course demands will be important in planning the logistics of implementation. Additionally, individuals with a deep knowledge of each student's skills and skill deficits will be able to assist in identifying additional instruction (e.g., what is my disability?) that may need to occur.

4. Readiness

What is your school/program's current culture regarding student leadership? What are the status quo practices for IEP development meetings? Is implementing this new process in alignment with other initiatives in your school/district or a major sea change in practice?

Answering the questions below with your partners may help you plan for implementation.

Question	A few (0-25%)	Some (26-50%)	Most (51%-75%)	Almost all (75%-100%)
How many students (with ED) in your classroom/school/district know what their disability is and why they receive special education services?				
How many students (with ED) in your classroom/school/district can share information about their preferences, interests, strengths, and needs?				
How many students (with ED) in your classroom/school/district attended their IEP meetings in the past year?				

Question	A few (0-25%)	Some (26-50%)	Most (51%-75%)	Almost all (75%-100%)
How many students (with ED) in your classroom/school/district participated by talking and sharing during their IEP meetings in the past year?				
How many parents of students (with ED) physical attended their child's IEP meeting in the past year?				

5. Logistics

To implement *Supporting Student-Led Transition Planning for Students with Emotional Disturbance* will require instructional time. For most students with ED – and students, in general – instructional time is tight. Will the lessons be delivered during a specific period of the day in a specific course – as part of Social Studies or Language Arts, for example? Will one teacher or more than one teacher deliver the lessons? Will a counselor engage with individual students or small groups of students during an advisory or club period? Will these lessons be administered across several days in advance of a student's IEP meeting or delivered weekly or monthly across a semester?

The school's daily schedule structure and the student's course load and program of study must be considered when planning for implementation. Section II of this guide is the content to be covered. A careful examination of the lessons, suggested timing for each, and the expected student outputs should help you and your team make decisions about the best mechanism for implementing. Student pre-knowledge is also an important factor here. It may be necessary to divide specific lessons or pre-teach specific information to establish prerequisite skills. Plan for these modifications to the *Guide* in your Implementation Plan.

Planning for implementation may take you and your team one intense week, a month, or an entire semester. As with any new endeavor, thoughtful planning will be critical for your success.

6. Training and Coaching

We suggest identifying a point person (a facilitator) who is knowledgeable about the Guide and student-led IEP processes as a coach for other interventionists. Just as Section II indicates, it is important that each adult who is facilitating the student led process (teaching or guiding the lessons) cover all the material. Coaching and Technical Assistance can be available through the TEST website (<https://www.umassmed.edu/TransitionsACR/models/test/>). While the precise length of lessons or setting for implementation may vary, if the material is not taught, intended outcomes cannot be expected. Research indicates that professional development to teach educators how to do an intervention results in only 5% of teachers using the new skills in the classroom, while the addition of coaching in the classroom increases the likelihood of implementation considerably (Joyce & Showers, 2002).

Training materials should reflect the school or program's context. Depending on the size of the implementation group, a facilitator may (a) develop a formal presentation with slides to operationalize each section the Guide; (b) assign pre-reading to interventionists and lead a working meeting to develop scripts or supplemental materials for the 5 lessons; or (c) meet with a very small group of interventionists and discuss each section of the Guide, sequentially. Section II of the Guide is intended to lead practitioners

through the steps of preparing students to participate in and lead their IEP meetings with minimal pre-training. However, if practitioners are unfamiliar with the concept of self-determination or new to instruction of students with ED, a facilitator may need to provide additional pre-teaching, based on Sections I and III in the guide. Further, if interventionists will be counselors, coordinators, or service providers who do not typically provide instruction, a facilitator may need to provide additional supports regarding classroom management and effective instruction.

While the content and sequence of lessons 1 – 5 in Section II address the learning necessary for students to be prepared for their IEP meetings, students will enter this instruction with different levels of knowledge and needs for support. Interventionists (and a facilitator) may plan to augment a lesson with pre-teaching on a topic or break one lesson into mini lessons to accommodate students' needs, classroom structures, or school schedules. Each component of the Guide, including the student worksheets and resources for planning and evaluation should be a component of the training, whether formal or informal. If the Guide will be implemented with a large number of students across a range of grades or settings, representing a range of needs and strengths, training may need to include a deeper study of methods for differentiating the delivery of information for students.

Once the lessons are being taught a plan for coaching should be part of implementation. Ideally, the coach would observe the lesson or activity, viewing the Teacher/Class Implementation Plan or a specific lesson plan, developed for the lesson taught. Time should be scheduled for the interventionist to reflect aloud on the session and the coach react, provide feedback, and both identify any necessary next steps. In the absence of live coaching, an interventionist might audio or video record a session, so that the individual and a colleague could both review the session later. If coaching sessions cannot occur, due to the logistics of staffing or timing in the school it is important to establish some form of a professional learning community or team meetings to monitor progress and problem solve barriers.

Below are some questions and tips that may be useful for the coaching sessions.

Possible coaching session agenda

- Interventionist self-reflection on successes during session
- Interventionist self-reflection on errors or concerns during the session
- Interventionist self-reflection on potential corrections or solutions

Possible team meeting agenda

- Report out on progress (i.e., lessons completed, and student progress data)
- Report out on successes
- Report out on concerns, barriers, challenges
- Group discussion of potential solutions
- Action plan for next meeting

7. Ready, Set, Go!

Once interventionists have completed the Teacher/Classroom Implementation Plan and organized the necessary materials for instruction, get started. If the school has a required Lesson Planning form, information from the Guide can be transposed to that form. Either document should be followed and used during observations by colleagues, as well as self-reflection on implementation.

In addition, an Implementation Checklist should be updated at least weekly – or after instructing each lesson – during intervention. This checklist will ensure that each component of the Guide was, in fact, instructed and increase the likelihood that students will gain the intended skills. After lesson 5 is completed the Implementation Checklist should be finalized. Depending on the context of the Guide’s implementation and the number of interventionists and students participating, an interventionist might maintain one Implementation Checklist or may monitor a separate Checklist for each student participating in the instruction.

Schedule and coordinate IEP meetings, embracing the idea of student-led IEP development.

Finally, provide feedback. Through coaching and/or team planning meetings, the interventionist(s) and facilitator(s) should maintain a regular feedback loop to ensure the Guide’s components are being implemented accurately and supporting students’ skill development. As noted in the section below, there are formative evaluation components that are also part of this feedback loop.

8. Evaluate

Section II of the *Guide* provides suggestions and resources for monitoring student progress through an initial *Self-Determination Student Self-Assessment* and students’ work samples. This Chapter includes a *Readiness* rating which may be completed before and after using the Guide as a measure of impact. The chart below may help an implementation team or a single interventionist determine what and when to evaluate for both individual student progress monitoring and overall impact of the use of *Supporting Student-Led Transition Planning for Students with Emotional Disturbance* on student participation in their IEP meetings.

Measure	Of	Collected By	When
Formative Measures			
Section II Worksheets	Student(s)	Interventionist	As part of instruction/ each lesson
Implementation Checklist	Interventionist	Interventionist/ Facilitator	As each lesson is completed/ at least weekly
Observation Notes/ Fidelity of Implementation of Lessons	Interventionist/ Observer-Coach	Interventionist/ Facilitator	At least twice during intervention (coach)/ recommend one-third of lessons (coach or self- reflection)

Measure	Of	Collected By	When
Implementation Team Meeting Notes	Students/ Interventionists/ Program	Facilitator	During/ immediately following each meeting during intervention
Summative Measures			
Readiness Rating	School/Program	Facilitator(s)	Pre/ Post
Self-Determination Student Self-Assessment	Student	Interventionist	Part of Lesson 2/ could also complete after IEP meeting end of instruction (Pre/Post)
IEP Participation Rating Form	Student	Meeting Coordinator	At end of each student's IEP meeting throughout intervention
Parent Survey	Parent	Meeting Coordinator	At end of each student's IEP meeting or at end of intervention (after Lesson 5)
Student-Led IEP Experience & Satisfaction	Student	Interventionist/ Facilitator	End of intervention
Completed Implementation Checklist	Interventionists/ Program	Interventionist/ Facilitator	End of intervention
Interventionist Satisfaction Form	Interventionists	Facilitator	End of intervention

Teacher/Class Implementation Plan

(this document may be used to guide observations by colleagues and self-reflection on the fidelity of implementation and any necessary mid-course adjustments to instruction)

Content	Date(s)/Time (class period)	Target Student(s)/ Setting	Materials	Evaluation/ Outputs	Differentiation Anticipated
Lesson 1: Understand your IEP					
IDEA requirements			IDEA Quick Guide		
Structure of an IEP			IEP Components document		
Past goals and performance			Student's IEP		
Lesson 2: Build self-determination					
Self-Awareness				Self-Determination Self-Assessment worksheet	
Setting Goals				Goal Setting Practice worksheet	
Strengths, needs, and interests				Statement of Strengths, Interests, and Needs worksheet	
Lesson 3: Create goals for your IEP					
SMART Goals			Student's IEP SMART Goals worksheet(s)	Completed SMART Goal(s) worksheet with feedback from others	

Content	Date(s)/Time (class period)	Target Student(s)/ Setting	Materials	Evaluation/ Outputs	Differentiation Anticipated
Lesson 4: Preparing to lead your IEP					
IEP meeting parts			What Happens During the IEP Meetings worksheet		
Student's possible role in each meeting part					
Preparation for IEP meeting				Preparing for My IEP worksheet	
Lesson 5: Practice leading your IEP					
Anticipating the actual meeting			Completed Preparing for My IEP worksheet		
Final preparation for IEP meeting			Possibly PowerPoint or other presentation software Possibly flip charts or poster board and markers Possibly camera or audio/video recording device	Leading My IEP Meeting worksheet	

Implementation Checklist

Content/ Materials	Component was Initiated	Component was Completed	Adaptations made to delivery	If not completed, explanation	Outcome data from this component
Lesson 1: Understand your IEP					
IDEA requirements/ IDEA Quick Guide					
Structure of an IEP/ IEP Components document					
Past goals and performance/ Student's IEP					
Lesson 2: Build self-determination					
Self-Awareness/ Self-Determination Self-Assessment worksheet					
Setting Goals/ Goal Setting Practice worksheet					
Strengths, needs, and interests					
Lesson 3: Create goals for your IEP					
SMART Goals/ SMART Goals worksheet(s)					
Lesson 4: Preparing to lead your IEP					
IEP meeting part/ What Happens During the IEP Meetings worksheet					
Student's possible role in each meeting part					
Preparation for IEP meeting/ Preparing for My IEP worksheet					
Lesson 5: Practice leading your IEP					
Anticipating the actual meeting					
Final preparation for IEP meeting/ Leading My IEP Meeting worksheet					

IEP Participation Rating Form

Check all that apply

Student Name: _____

Attended

Introduced Self and Others at the Meeting

Presented* on Preferences, Interests, Needs & Strengths

Presented on Post-School Goals and Dreams

Presented on Progress toward Annual and/or Post-School Goals

Engaged in Discussion with Other Team Members

Led Most Aspects of the Meeting

* Presented = presented or shared information

Parent/ Family Member Survey

(this can be converted to SurveyMonkey © or some other survey program typically used, if preferred)

Student's Name (optional): _____

Student's Grade: _____

I attended the IEP meeting in person, online, by phone, did not attend.

This school year, your student had the opportunity to learn about their IEP and how to lead the IEP meeting. Please mark how much you agree or disagree with the following statements:

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
My student learned how to lead their IEP meeting					
My student knew more about IEP their IEP than they knew before					
My student understands their rights as a student with disability					
My student is able to identify their strengths					
My student is able to describe their goals for the future					
My student led parts of their IEP meeting					
The most recent IEP meeting was different than previous IEP meetings I've attended					

If the meeting was different, please describe what was different about it.

What did/do you like about your student learning more about their IEP and transition planning?

What did/do you not like about your student learning more about their IEP and transition planning?

Teacher Satisfaction Survey

(this can be converted to SurveyMonkey © or some other survey program typically used, if preferred)

Interventionist Name (optional): _____

Interventionist Role
(e.g., social studies teacher, transition coordinator, social worker): _____

Number of students taught using the Guide this grading period: _____

Number of students attended IEP meetings this grading period: _____

Primary instructional makeup for Guide use: (e.g., 1:1, small group, whole class, dyads): _____

Primary instructional context for Guide use: (e.g., counseling session, advisory period, Civics 3rd period):

Please rate your agreement with the following statements:

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
<i>Supporting Student-Led Transition Planning for Students with Emotional Disturbance</i> (the Guide) increased my skills for teaching students about their IEP					
The Guide increased my skills for promoting specific self-determination components for my student(s)					
The Guide increased my skills for teaching students to develop measurable goals					
The Guide increased my skills for teaching students how to lead their IEP meeting					
The Guide was helpful in working with students ED, specifically					
The Guide is easy to understand					
The Guide is easy to use					
Students increased their level of participation in IEP meetings, following use of the Guide					
I increased my confidence in my student(s) ability to lead their IEP meeting(s), following use of the Guide					

What were the most useful aspects of the Guide?

What adaptations did you make to the guide (that could help other educators)?

What were the least useful aspects of the Guide?

Were there any particular successes with student(s) you want to share?

Resource List

National Collaborative on Workforce and Disability

http://www.ncwd-youth.info/wp-content/uploads/2016/10/411_Disability_Disclosure_complete.pdf

- » Unit 2: “Disclosure...What Is It and Why Is It So Important?”
- » Unit 3: “Weighing the Advantages and Disadvantages of Disclosure”
- » Unit 4: “Rights and Responsibilities under the Law”

I'm Determined – Virginia Department of Education

- » Goal Plan
https://www.imdetermined.org/wp-content/uploads/2018/04/180130_IMD_Goal-Plan.pdf
- » My Good Day Plan: Implementation Guide
https://www.imdetermined.org/wp-content/uploads/2017/10/good_day_plan_implementation_guide.pdf
- » Kyle – My Good Day Plan, Sample I
https://www.imdetermined.org/wp-content/uploads/2017/10/gdp_kyle_11.12.pdf
- » Sarah – My Good Day Plan, Sample II
https://www.imdetermined.org/wp-content/uploads/2017/10/gdp_sarah_11.12.pdf

Self-Directed IEP Student Workbook, 3rd Edition

- » <https://ou.edu/content/dam/Education/zarrow/ChoiceMaker%20materials/Self%20Directed%20IEP%20Teacher%20Manual%202016.pdf>

Tip Sheets

- » YOU GOT THIS: Taking a Leadership Role in Your IEP Meeting
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1151&context=pib>
- » Becoming an Adult: Challenges for those with MHC
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1064&context=pib>
- » Strategies for Engaging Young Adults
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1132&context=pib>
- » Teen on IEPs: Making my “Transition” Services Work for Me
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1067&context=pib>
- » How to Speak UP and Be Heard: Self-Advocacy
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1092&context=pib>
- » Supporting the Education Goals of Young Adults with Mental Health Conditions
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1131&context=pib>
- » Supporting Employment for Young Adults living with Mental Health Conditions
<https://escholarship.umassmed.edu/cgi/viewcontent.cgi?article=1130&context=pib>

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Appendix A IDEA Quick Guide

What is IDEA???

The Individuals with Disabilities Education Improvement Act (IDEA) is a United States law which says:

- Students like you must have access to a free education which is appropriate for your needs.
- Your education must prepare you for the education, employment, and independent living goals you have for after high school.

What are my rights with IDEA

IDEA law promises you 6 things:

1. A free and appropriate public education (FAPE).
2. An invitation for you and your parents to participate in the planning of your education.
3. An Individualized Education Program (IEP) designed to help you achieve your goals.
4. A free evaluation to see if you have a disability that has a substantial impact on your learning or behavior, if your teacher thinks you might have a disability.
5. The right for your parents (or you if you are legally an adult) to challenge your current educational services.
6. As much time in a regular education classroom during school days as possible while still meeting your needs.

Things to know! Important IDEA details

- When you become an adult according to your state's laws (usually sometime between the ages 18 and 21), the right to challenge the educational services you are receiving can be moved from your parents to you. For this to happen, your IEP must say that you have been informed that these rights will be transferred to you at least one year before they are actually transferred.
- Your educational program must be linked to the general curriculum that all high school students complete. Your IEP must include a description of how you are involved in the high school curriculum.
- You are expected to complete all state- and district-wide testing. You can get modifications and/or accommodations to these tests if you need it. Or, if you are unable to complete these tests, alternate tests will be created for you.
- You should be invited to all IEP meetings about your transition plans for after high school. If you do not go to one of these meetings, your preferences and interests should still be talked about in the meeting.
- Your IEP team must include at least 1 of your regular education teachers, and this teacher should participate in the development, review, and revision of your IEP.

Appendix B

Self-Determination Student Self-Assessment

Student Name _____ Date _____

Self-Determination skills help you to know:

- Yourself
- Your goals
- The supports you need to reach your goals

Use the following scale to rate the statements below:

3 = almost always/most of the time 2 = sometimes 1 = rarely or never

Rating			
3	2	1	I set goals to get what I want or need.
3	2	1	I make plans for reaching my goal.
3	2	1	I check my progress on how I am doing toward reaching my goals.
3	2	1	I attend my IEP Meetings.
3	2	1	I know the goals listed in my IEP.
3	2	1	I participate in my IEP Meetings.
3	2	1	I know what my disability is and how it affects me.
3	2	1	At school, I can communicate with educators about what I want or need.
3	2	1	At school, educators listen to me when I talk about what I want or need.
3	2	1	At home, I can communicate about what I want or need.
3	2	1	At home, my parents listen to me when I talk about my wants or needs.
3	2	1	I have people in my life that I can ask for help with dealing with my disability.
3	2	1	I ask for help when I need it.
3	2	1	I know what I need, what I like, and what I enjoy doing.
3	2	1	I tell others what I need, what I want, and what I enjoy.
3	2	1	I help to make choices about the supports (social, emotional, behavioral, and educational) supports that I need in school and school-related work environments.
3	2	1	I can describe the difficulties I have due to my disability.
3	2	1	I recognize the triggers that lead to difficulty with my disability.
3	2	1	I can make choices to keep from reacting to triggers that cause difficulties for me.
3	2	1	I believe I have control to direct my life.
3	2	1	I take care of my personal needs (clothes, chores, meals, grooming).
3	2	1	I make and maintain friendships with others my age.
3	2	1	I make good choices.
3	2	1	I believe that working hard in school will help me get a good job.

Adapted from 2008 Commonwealth of Virginia Department of Education Training and Technical Assistance Centers - I'm Determined Project Self-Determination Checklist ~ Student Self-Assessment

Appendix D

Statement of Strengths, Preferences and Needs Worksheet

Student Name: _____

Date: _____

Knowing your strengths, preferences, interests, and needs can help you make decisions in your life (what kind of job you would like to have, what you like to do for fun, what you want to study in school, etc.) By writing down your strengths, preferences, interests, and needs all on this page will help you with telling others in your support team about yourself quickly and clearly.

My statement of my strengths, my preferences, my interests, and my needs	
My Strengths	My Preferences
What do I do well in school?	When I am trying to do work, do I like it quiet or with noise? Do I like to work alone or in a group?
What do I do well at home or in my community?	What activities or organizations do I enjoy participating in?
What do other people say are my strengths?	What works for me? What helps me be successful?

My statement of my strengths, my preferences, my interests, and my needs

My Interests

My Needs

What do I like to do when I am not at school?

What are accommodations that help me?

What activities or organizations do I enjoy participating in?

How can others help me?

What are my hobbies?

What things are difficult for me?

Appendix E Creating SMART Goals

Use this worksheet to practice writing a SMART goal, and to draft your own SMART goals for your IEP.

Remember, SMART goals should be:

- **Specific** – What am I going to do?
- **Measurable** – How will I know I have done it?
- **Achievable** – What steps do I need to take to make this happen?
- **Relevant** – How does this relate to my plans and needs?
- **Timely** – When will I have done it?

Goal example

Draft Goal Example:	
Specific - What I am going to do?	
Measurable - How will I know I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal Example:	

Goal 2

Draft Goal 2:	
Specific - What I am going to do?	
Measurable - How will I know I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal 2:	

Goal 3

Draft Goal 3:	
Specific - What I am going to do?	
Measurable - How will I know I have done it?	
Achievable - What steps do I need to take to make this happen?	
Relevant - How does this relate to my plans/ needs?	
Time bound - When will I have done it?	
Possible Obstacles:	Solutions
Revised/Final Goal 3:	

- d. Is my goal RELEVANT? – How does this relate to my IEP or overall plans for the near term or the short-term?
- If your goal isn't relevant, make it more relevant by making sure it is realistic and in line with what you need to accomplish.
- e. Is my goal TIMELY? – When will I expect to accomplish this goal?
- If your goal isn't timely, make it more time-bound by stating when or how often you expect to accomplish your goal (for example, by the time I graduate, my first summer after graduation, next fall, etc.).

Now gather each of the pieces of your goal and write it as a single sentence SMART goal here. You may need to write several versions of your goal sentence several times until you get it just right.

Appendix G Preparing for my IEP

What needs to happen before the IEP meeting

Activity	Person responsible (student, teacher, both)	Notes
Select date for the IEP meeting		Date and time for the IEP Meeting:
Identify IEP meeting participants (e.g., parents, teachers, adult agency representatives, other supports)		Who should come to my IEP meeting?
Invite IEP meeting participants		How will participants be invited?
Secure room for IEP meeting		Where will the IEP be held? Is the room reserved for the date and time needed?
Prepare portfolio/materials for the meeting (e.g., PowerPoints, handouts)		What materials are needed? How many copies?
Other not listed above		As I think about the IEP meeting is there anything I haven't thought about that I need to be prepared?

What happens during the IEP meeting (taken and modified from Self-Directed IEP)

Activity	Person responsible (student, teacher, both)	Notes
1. State the purpose of the meeting		The purpose of this meeting is to...
2. Introduce everyone		I would like to introduce everyone [OR I would like for everyone to introduce yourself and tell your role]...
3. Review past IEP goals and performance		First, we will look at my IEP goals and performance. Please turn to page or look at the screen...
4. Ask for feedback from others		Now I invite you to make any comments or suggestions about what we have reviewed...
5. State your proposed IEP and transition goals		Here is a goal that I propose for IEP and transition... Then share any other goals you have prepared.

Activity	Person responsible (student, teacher, both)	Notes
6. State what support you'll need		Based on this goal/these goals, I believe I will need the following supports to help me reach them...
7. Ask for feedback from others		Now I invite you to make any comments or suggestions about what I've shared...
8. Summarize your goals and what was happened at the meeting		To summarize, we have discussed my goal(s) and made the following decisions...
9. Thank everyone for attending		Thank you for attending my IEP meeting!

Martin, J. E., Marshall, L. H., Maxson, L., & Jerman, P. (2016). *Self-Directed IEP: Teacher's Manual* (3rd ed.)

Appendix H Leading My IEP Meeting

Activity #1	Person Responsible	Time Allotted
State the purpose of the meeting		

The purpose of the meeting is to...

Activity #2	Person Responsible	Time Allotted
Introduce everyone		

I would like to introduce everyone [OR I would like for everyone to introduce yourself and tell your role]...

Activity #3	Person Responsible	Time Allotted
Review past IEP goals and performance		

First, we will look at my IEP goals and performance. Please turn to page or look at the screen...

Activity #4	Person Responsible	Time Allotted
Ask for feedback from others		

Now I invite you to make any comments or suggestions about what we've reviewed...

Activity #5	Person Responsible	Time Allotted
State your proposed IEP and transition goals		

Here is a goal that I propose for IEP and transition... Then share any other goals you have prepared.

Activity #6	Person Responsible	Time Allotted
State what support you'll need		

Based on this goal/these goals, I believe I will need the following supports to help me reach them...

Activity #7	Person Responsible	Time Allotted
Ask for feedback from others		

Now I invite you to make any comments or suggestions about what I've shared...

Activity #8	Person Responsible	Time Allotted
Summarize your goals and what has happened at the meeting		

To summarize, we have discussed my goal(s) and made the following decisions...

Activity #9	Person Responsible	Time Allotted
Thank everyone for attending		

Thank you for attending my IEP Meeting!



Translating Evidence to Support Transitions

YOU GOT THIS:

Taking a Leadership Role in Your IEP Meeting

Tip Sheet 11

Transitions to Adulthood Center for Research

June 2020



What is an IEP and who is it for?



An IEP is an individualized education program for students like you (ages of 3 to 21) who receive special education services in public schools. An IEP is a legal document that describes the help that you and other students with disabilities will receive at school.

What is an IEP meeting?



Once a school year, an IEP meeting is set up to help you and your support team review and update your IEP. The meeting goes over your goals and plans, as well as the services you will receive.

What is the transition plan in your IEP?



In high school, a transition plan is added to your IEP. By law, you must have a transition plan by age 16 at the latest. A transition plan includes your goals for after high school and picks out support services to help you achieve your goals. The transition plan is based on your needs, strengths, skills, and interests.

Benefits in leading your IEP



There are benefits linked to taking a leadership role in your IEP meeting. High school students who lead their IEP meetings tend to have higher graduation rates, go to college more often, and make more money in jobs after high school.

What can help you lead your IEP meeting?

There are 5 steps you can take that will help you to lead your IEP meeting:

1 Understand your rights & your IEP. The more you know and understand about the IEP process, the more active you can become in your leadership role. Ask an adult in the school like your counselor, teacher, or case manager to help you know more about your IEP. Learn about the legal rights you have as a student with a disability (bit.ly/idea-quick-guide) and read your IEP (including your transition plan).



2 Know yourself. Make a list of your strengths and interests. Also, write down what things help you and what things make it hard to do well in school and in life. This will help you clearly say what you want from your high school at your next IEP meeting.

3 Create goals for your IEP. Create goals for school, work and living on your own, you can discuss these with your school team. Your goals should be based on your strengths, interests, and needs. The goals that you create will be the basis for your IEP meeting.



4 Prepare to lead your IEP. Think about what parts of the IEP you feel comfortable leading. For example, you can create a PowerPoint about your goals to share during the IEP meeting. Remember, you do not have to lead the whole meeting.

5 Practice leading your IEP. Practice the parts of the IEP that you are going to lead with someone you are comfortable with.



CONCLUSION

The most important thing to know is that your IEP and the IEP meeting is about YOU! Remember that having a disability does not define you and doesn't limit what you can do in and with your life. You can have a bright future and your IEP can help you succeed!

This tip sheet is a sequel to [Teens on IEPs: Making my "Transition" Services Work for Me](#)

Resources

Biebel, K., Golden, L., Huckabee, S., & Ellison, M. L. (2017). Translating Evidence for Successful Transitions (TEST): Supporting student-led transition planning for students with emotional disturbances.

Navigating IEP Meetings. (2020, January 22). Retrieved from <https://www.understood.org/en/school-learning/special-services/ieps/navigating-iep-meetings>

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Becoming an Adult: Challenges for Those with Mental Health Conditions

Research Brief 3

Transitions RTC

2011

Introduction

The transition to adulthood is a continuous process of rapid developmental change that starts accelerating at age 16, and for most, is completed by age 30. It is an important and exciting time for all young people. During this period, most individuals take steps to live more independently and to depend less on family support. These steps, which involve completing school and training, launching work lives, and developing relationships with others, can greatly influence much of their future adult life. However, for youth and young adults with serious mental health conditions the changes during this stage of life are challenging and complex.

Serious mental health conditions (SMHC) result in significant functional impairment. SMHC include both serious mental illnesses and serious emotional disturbances.¹ SMHC do not include developmental disorders, substance use disorders, or mental disorders caused by medical conditions. It is estimated that 6-12% of transition-age youth and young adults struggle with a serious mental health condition (2.4-5 million individuals).²

During the transition to adulthood individuals are neither children nor mature adults; their development, functioning, and service needs are different from those who are older or younger. This brief will describe psychosocial development and family life cycle changes during the transition to adulthood in typical youth and youth with SMHC. We also describe additional challenges this population faces, and what can be done to support them and improve their outcomes.

Typical development

Psychosocial development occurs in five main areas:

- Cognition (thinking)
- Moral reasoning
- Social cognition
- Sexual orientation and gender identity
- Identity formation



Images in photographs contain professional models

Psychosocial development begins in infancy and reaches maturity in adulthood. Increased maturity in these areas underlies increased functional capacities. For example, increased abilities for abstract thinking are needed to have the ability to put oneself in another's "shoes", which is necessary for the development of empathy and embracing the golden rule, which is needed to have increasingly sophisticated relationships, or appropriate social interactions at work. Recent research also indicates that the expression of maturity in these areas is modified by peer presence and impulses, and that this influence diminishes with maturity.^{3,4} Table 1 summarizes the changes in each area of psychosocial development.

Unique aspects for those with serious mental health conditions (SMHC)

As a group, young people with SMHC are delayed in every area of psychosocial development that has been examined to date.¹ Table 1 highlights the typical features of each stage of psychosocial development in adolescence and young adulthood, and describes some of the additional challenges that young adults with SMHC often face. It is important to note that the descriptions below depict this population as a group. Individuals will vary in their level of maturation.

Table 1. Stages of Psychosocial Development in Adolescence and Young Adulthood

Stage of Development	Highlights of each stage	Consequences of developmental delay & potential additional challenges for those with SMHC
Cognitive Development	<ul style="list-style-type: none"> • Increased capacities for <ul style="list-style-type: none"> • Thinking abstractly • Thinking hypothetically (if X, then Y) • Having insight or self-awareness • Simultaneous consideration of multiple ideas • Future planning • Calibrating risks and rewards • Regulating undue peer influence on judgment 	<ul style="list-style-type: none"> • Delays can impede abilities to: <ul style="list-style-type: none"> ○ develop & execute plans ○ weigh pros and cons of actions ○ make changes based on self-awareness ○ regulate peer influence on judgment • Additional challenges; High rates of co-occurring learning disabilities and developmental disorders, which challenge cognitive development & learning
Social Development	<ul style="list-style-type: none"> • Friendships become more complex, involving mutuality, intimacy and loyalty • Increased perspective taking • Influence of peer relationships peak, then decline into adulthood • Social context shifts from lots of daily contact with many classmates to smaller social networks and work social settings 	<ul style="list-style-type: none"> • Delays can impede abilities to: <ul style="list-style-type: none"> ○ Participate in the increasingly complex peer relationships ○ Put themselves in others' shoes ○ Think hypothetically about social actions (i.e. plan and anticipate consequences) ○ Negotiate the nuances of workplace social rules • Combination of social immaturity and symptoms can inhibit quality and quantity of relationships across settings (e.g. school, work, family) • Social repercussions can produce emotional pain
Moral Development	<ul style="list-style-type: none"> • Increased ownership of own set of rights & wrongs • More able to understand "mitigating circumstances" of moral rules • More empathic responses/use of Golden Rule • Ability to see and act on rationale for sacrifice for the greater good 	<ul style="list-style-type: none"> • Delays in understanding and acting on the nuances of peers' social rules and society's moral standards may contribute to: <ul style="list-style-type: none"> ○ Compromised success in school or work ○ Increased criminal behavior ○ Reduced quality and quantity of friendships
Social-Sexual Development	<ul style="list-style-type: none"> • Provides new forms of emotional intimacy • Skills to negotiate sexual relationships typically on par with social development • Sexual behavior can impact roles in peer groups • Sexual orientation and gender identity resolves 	<ul style="list-style-type: none"> • Delays can impede abilities to: <ul style="list-style-type: none"> ○ Have healthy sexual relationships ○ Practice safe sex • Sexual abuse histories can additionally impede abilities to form healthy sexual relationships • Individuals who have alternative gender identities or sexual orientation are at greater risk of physical abuse, homelessness, and suicide
Identity Formation	<ul style="list-style-type: none"> • Seeking answers the question...Who am I? • Is a prerequisite for feeling unique while feeling connected to others • Produces boundary pushing • Some experimentation needed to try out aspects of identify • Rejection of authority facilitates ownership of identity choices 	<ul style="list-style-type: none"> • Delays can contribute to: <ul style="list-style-type: none"> ○ Prolonged experimentation and rejection of authority beyond typical ages ○ Difficulty making role choices; occupation, friend, spouse⁵ ○ Undue influence of others on self evaluation (not sufficiently distinct from others)⁶ • Self-image is often poor ^{7,8}

Typical Family Life Cycle Stages

The transition to adulthood also represents changing dynamics in family functioning. As adolescents begin to exert increased levels of independence and move into adult roles, the role of parents in decision-making and nurturing shifts, parental focus on child-rearing diminishes, and changes in family structure occur.⁹ These changes vary depending on family cultural background and other factors such as divorce or blended families. Many parents or parental figures of youth with SMHC face additional challenges and family relationships may be complicated by youth involvement in public systems. Overall, the issues that face many families of youth with SMHC can make this challenging stage of the family life cycle even more difficult. See Table 2 below for more details.

Why is it important to understand these developmental changes?

1. They help define why services for this age group need to be tailored to their developmental needs.
2. They help us design interventions that are developmentally appropriate.
3. They help differentiate between behavior at these ages that are “typical” aspects of healthy development and ones that are atypical.
4. They likely result in highly compromised educational attainment, under- and unemployment, limited friendships, increased homelessness, and higher rates of incarceration. (See next section)

What else is important to know about the transition period?

Individuals with SMHC face extra challenges to the typical bumps in the road most people face during the transition years. Because of developmental delay along with other contributing factors, successful movement into adult roles and adult role functioning for young people with SMHC is often compromised:

- High school dropout rate: 45% of special education students with SMHC ¹⁰
- Post high school employment: Students with SMHC 42%, same age general population 66% ¹¹
- Homelessness: 33% of adolescent discharged from residential treatment ¹²
- Arrested during transition years: 69% of male, 46% of female intensive MH service users¹³

Effective developmentally appropriate & appealing services are rare.¹⁴ There are few established evidence based practices (EBP) for the full age range of the transition years. Some EBP’s are only for adolescents, others are only for adults and have not demonstrated efficacy with young adults. Because of the developmental uniqueness of young adulthood, “adult” evidence based practices that have not tested whether they are effective specifically in this age group cannot be assumed so. There is also no research assessing the availability of EBP’s or programs that follow systematically designed practice guidelines for this age

Table 2. Stages of the Family Life Cycle

Stage	Family Features	Changes	Potential additional challenges families of children with SMHC may face
Families with adolescents	Increasing flexibility of family boundaries for child’s independence and grandparent frailties	<ul style="list-style-type: none"> • Parent/child relationships shift to permit adolescents’ dependence to wax and wane • Refocus on midlife marital and career issues • Shift toward caring for an older generation 	<ul style="list-style-type: none"> • Stresses of raising a child with a chronic health condition • Many youth involved with public systems have been in out-of-home care, which typically restricts parental roles during the time away, if not implicitly communicating parental incompetence
Launching children & moving on	Accepting a multitude of exits from and entries into the family system (i.e. birth of grandchildren, passing of elders)	<ul style="list-style-type: none"> • Renegotiation of marital system as dyad • Children and parents develop adult-to-adult relationships • Inclusion of in-laws and grandchildren • Loss of senior generation 	<ul style="list-style-type: none"> • Higher family rates of: <ul style="list-style-type: none"> ○ Single parent household ○ Poverty ○ Mental health conditions ○ Substance use ○ Incarceration • Challenges can impede successful “launch” during transition years

group (e.g. 15,16). However, findings about general age-tailored practices indicate that 25% of state child MH systems and 75% of state adult MH systems have no age-tailored services for this age group. The availability of these programs in states that have them are generally limited to a few geographic areas.¹⁷

For youth in transition, services and supports can end arbitrarily. Adolescents with SMHC are often in special education, child welfare, mental health, or juvenile justice systems. Children's systems can complicate the transition to adulthood by terminating eligibility for their services at a specific age designated as the end of childhood (typically age 18 or 21), while failing to adequately prepare adolescents for functional adult roles or ensuring accommodation in the adult service system.¹ The majority of adolescents with SMHC, however, do not receive any services for their mental health condition.¹⁸ Access to public adult mental health services is more restrictive than child services producing an arbitrary barrier to needed services when youth age out of children's services.¹⁹

TAKE HOME MESSAGE

The challenges:

- Young people with SMHC are in a unique stage of development during the transition to adulthood
- Their psychosocial development is often delayed
- Their successful entry into valued adult roles is often seriously compromised
- They need supports and interventions tailored to their unique developmental needs
- These types of services are rare and few evidence-based approaches have been established
- The bifurcated configuration of child and adult service systems pose arbitrary barriers

Remedies:

- More evidence-based practices need to be developed
- EBP's and other well-informed, developmentally appropriate approaches need to be widely available and accessible
- Policies need to ensure continuation of these supports from adolescence into adulthood until adult functioning is well established

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What We Know From the Field

Young adults can be actively engaged and retained in services that are important to them by using proactive approaches. We know that young adults often under-utilize services for serious mental health conditions. The scarcity of treatment resources, the lack of adaptation to young adult culture or needs, and the challenges of navigating the treatment system as adults may explain unmet treatment needs. Moreover, young adults may need to develop self-advocacy skills because their parents or others in their support system may have advocated for them in the past. Simply providing young adults with information about how and where to get care or services does not always work.

Change is a cornerstone of the transition to adulthood. Aside from their mental health needs, young adults living with mental health conditions may need support with obtaining meaningful employment, education, housing, community integration, mentoring and peer supports, and/or developing supportive relationships or social networks.¹⁻⁴ Be aware that their services may need adjusting as their needs and goals change.

Providers need to develop a connection, build trust, and create a working therapeutic alliance with each young adult. See each young adult as a partner. Try to be flexible, and respond according to where the **young adult is at in his or her life**. Utilizing these principles will help providers to develop a strong foundation of mutual respect and the rapport needed to work effectively with young adults.



Guiding Principles for Working with Young Adults

- **Develop a therapeutic alliance with each young adult by:**
 - **Establishing a connection by using a functional and person-centered approach** (rather than a medical approach). Focus on the young adult, their goals, interests, desires, and skills rather than their diagnosis.⁵ Find out what the young adults' goals are and allow them to drive the process. Ask questions and really listen to what they want and which areas they would like support.
 - **Being helpful** by connecting young adults with the services they feel they need to achieve their goals.⁶
 - **Being genuine and likable** (e.g., friendly, empathetic, compassionate, honest, and amiable) with young adults by clearly expressing interest in helping them find the services and supports that meet their goals/needs. Avoid taking on an authoritarian or parental role.⁷
 - **Allowing for flexible meeting times and locations.** Help with transportation, if needed. Young adults may miss appointments more than older adults so try to be flexible with cancellations and missed meetings. Assist young adults in scheduling and setting up reminders about future appointments, and brainstorm with the young adult about ways to hold them accountable to attend their appointments.
 - **Being consistent and following through** on plans and promises.⁶
- **Get to know each young adult by:**⁶
 - **Understanding their** reason or reasons for coming to services
 - **Finding out the importance** of school and work in their life
 - **Discovering who influences** them in their life; getting to know their social influences
 - **Discussing the role of family** biological or otherwise youth-defined
 - **Describing** releases of information and making sure they understand their purpose and need

Some tips for meeting with young adults:

- **Ask one open-ended question such as** “What do you like to do for fun?” or “What do you need help with?” and then STOP to listen to the answer. Do not ask questions in quick succession.⁹
- **If you think the young adult is missing something** or needs more information, ask a question instead of just giving them the answer. For example, if a young adult wanted to take an art class ask him or her “I wonder if there are costs associated with taking the class”.⁹
- **Try to be descriptive when offering praise** or talking about a strength. Say more than “great”. Also offering congratulations for accomplishments (large and small) is important.⁹
- **Provide reflection** when a young adult says something meaningful, important, or personal, or mentions something often.⁹



- **If technology is available to you, use texting and social media to engage young adults.** Young adults rely on heavily on texting and social media (e.g., Twitter, Instagram) to communicate. Checking in using texts and sending appointment reminders via text are good ways to connect with young adults. Discuss with the young adult what his or her preferred communication and establish parameters for using them.
- **Ask the young adult about any desires or goals** they may have to make academic and/or employment changes.⁶ Refer to services that:
 - Focus on career development and exploration that may include resume building, how to apply for a job, how to dress, and how act being in a professional environment.⁸
 - Assist young adults in finishing high school and/or transitioning to post-secondary school education.
- **Identify services and supports that are developmentally appropriate.** Young adults may have stronger skills in some areas than others. Try to find services and supports that match the developmental stage of the young adult.
- **Make and keep connections with other agencies and organizations** to create a more integrated approach and to assist with referrals. Use a proactive, but gentle approach. Do not assume the young adult will follow-up later. Do a warm hand off. Encourage young adults to use their service authorization person or case manager’s telephone number to schedule the appointment.
- **Assist young adults in developing important life-skills** such as advocacy and self-determination.
- **Refer young adults to services and supports** that have been specifically adapted for young adults and that have near-age peer mentors.
- **It takes cultural sensitivity and respect** to relate to young adults effectively.
 - Providers should have sensitivity to the diverse cultural/linguistic values they may come across while working with young adults. Be aware of socioeconomic differences, sexual orientation, and gender identity.
 - Be attuned to the generation you are talking to. In general, young adults have different values, language, technology dependence, and expectations when compared to older adults.

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SUGGESTED RESOURCES

- Achieve My Plan (AMP's) Top Ten Tips for Engaging with Young People: <https://www.pathwaysrtc.pdx.edu/pdf/proj-5-AMP-top-ten-tips-for-engaging-young-people.pdf>
- Davis, M., & Golden, L. (2018). Annotated bibliography: State-of-the-science conference proceedings. Worcester, MA: University of Massachusetts Medical School, Department of Psychiatry, Systems and Psychosocial Advances Research Center (SPARC), Transitions Research and Training Center. Retrieved from <https://www.umassmed.edu/globalassets/systems-and-psychosocial-advances-research-center/images/annbib-sos2018.pdf>
- During Meetings I can't Stand It When...: A Guide for Facilitators and Team Members: <https://www.pathwaysrtc.pdx.edu/pdf/proj3-facilitator-guide-2013.pdf>
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- TIP Case Plan Goal Domains: https://www.pathwaysrtc.pdx.edu/HTItoolkit/files/04-Service_and_Delivery/2-Individualized_Planning/C.TIP_Case_Plan_Goal_Domains.pdf

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Teens on IEPs: Making My “Transition” Services Work for Me

Tools for School - Tip Sheet 4 Revised

Transitions RTC

April 2015

What is an Individualized Education Program (IEP) and “Transition” Services?

An IEP is an individual education plan written in public school for children ages 3 to 21 that by law, describes the special education services and goals for a student with an identified disability. Special ed services involve different techniques that help the student in a way that typical instruction cannot. Transition services are plans within the IEP that address your specific needs in relation to life after high school.



What are my school's responsibilities?

- Determine eligibility for special ed services (If you think you should be getting these services and aren't, ask for help)*
- To conduct an annual review of my IEP to identify my strengths, interests and needs (You can request meeting more often to review goals)
- Summarize my academic and functional levels
- Deliver accommodations, modifications and related services i.e., counseling, occupational and physical therapy, speech-language pathology, and psychological services decided by my IEP team
- At age 16, discuss with me my plans for after high school including “transition” services
- My attendance at IEP meetings on “transition” services or goals

What should my IEP “transition” services include?

- Identification of your interests and ideas for work or school after high school
- Measurable goals related to education, training, jobs and independent living
- Related services or courses needed to reach goals
- Referrals or activities to link me up to adult services to meet my goals; i.e., vocational programs, supported employment or education and adult mental health services
- A specific transition planning form; requirements as described in IDEA, state requirements may vary. *See NSTTAC Indicator 13 Checklist link below for minimum requirements.

*For more information please visit: <http://ed.gov/parents/needs/speced/iepguide/index.html#process> & <http://fcsn.org/parentguide/pguide1.html>

*National Secondary Transition Technical Assistance Center (NSTTAC) Indicator 13 Checklist Form A: <http://www.nsttac.org/content/nsttac-i-13-checklist>

What are my rights on an IEP?

- To ask as many questions as I would like during the IEP meeting
- When my parent signs off or consents to the initial IEP, services and goals will begin
- To request/refuse certain services on my IEP or request goals to be added/changed
- To ask for a team meeting if I want to make changes after the IEP is signed
- To reject any/all of my IEP (The school contacts the Bureau of Special Education Appeals)
- To withdraw from my IEP with documentation in two ways: 1) If I demonstrate during a reevaluation, that the services are no longer needed, or 2) My parent elects to take me out of the special ed program
- Being informed of my rights and responsibilities one year before reaching the age of majority (in some states age 18)

Who can attend my IEP meeting?

- When transition planning starts, I must be invited to the meetings; according to federal law transition planning starts at 16, though for some states it could be earlier (I have the right to attend my annual IEP meeting at any age, but some parents do not want their young children present)
- Special ed coordinator, teacher/s, parent/s or guardian, counselor, special ed advocate, friends, relatives, or community members (A Special Education Advocate is a representative that informs you of your educational rights and assists in negotiating and resolving disputes with the school district, also, there may be a cost involved in getting a Special Education Advocate) For information please visit: <http://www.ed-center.com/specialeducationadvocate>
- Other people or agencies that have special expertise or knowledge about me

Sources

U.S. Department of Education: <http://ed.gov/parents/needs/speced/iepguide/index.html#process>

eHow family: http://www.ehow.com/way_5530520_can-withdraw-child-iep-program.html

UnderstandingSpecialEducation.com: <http://www.understandingspecialeducation.com/IEP-meeting.html>

LD.Org: <https://www.understood.org/en/school-learning/choosing-changing-schools/leaving-high-school/planning-for-college-a-4-year-guide-for-high-school-students>

Federation for Children With Special Needs: <http://fcsn.org/peer/ess/accomodationsfs.html>

Federation for Children With Special Needs: http://fcsn.org/pti/topics/iep/tools/iep_faq.pdf

Maryland Developmental Disabilities Council /Youth Empowerment Alliance "Taking Control of Your Life":

<http://www.md-council.org/resources/resources-council-grantees/>

National Dissemination Center for Children with Disabilities: <http://nichcy.org/schoolage/iep/team>

State of Washington Office of Superintendent of Public Instruction: <http://www.k12.wa.us/SpecialEd/Families/default.aspx>

Iowa Department of Education:

<https://www.educateiowa.gov/pk-12/special-education/iowas-guidance-quality-individualized-education-programs-ieps>



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How To Speak Up and Be Heard: Self Advocacy

Community of Practice, Northeast Massachusetts 2014

SELF ADVOCACY IS THE ABILITY TO SPEAK UP FOR YOURSELF AND FOR THE THINGS THAT ARE IMPORTANT TO YOU. AS YOU BECOME OLDER AND TAKE ON MORE RESPONSIBILITIES IN YOUR LIFE, SELF ADVOCACY HELPS YOU:

- ▶ Get what you need
- ▶ Make your own choices
- ▶ Learn how to say no
- ▶ Express your feelings respectfully

Places to Use Self Advocacy

Putting it Into Words

AT WORK OR SCHOOL

- Adjusting your schedule
- Participating in meetings
- Asking for accommodations
- Requesting tutoring
- During a job interview
- Asking for a raise

• **AT SCHOOL:** E-mail to professor: “I am asking for a week extension for this assignment. I haven’t been feeling well and I fell behind.”

• **AT WORK:** “I can’t work on Sunday, I have a family commitment. Can I work a different shift instead?”

AT HOME

- Managing finances (bills/ roommates)
- Requesting personal space/time
- Renting an apartment
- Sharing food costs
- In a relationship

• **WITH ROOMMATES:** “I have class at 8 A.M. Can you stop playing your music by 10 P.M.?”

• **ARGUMENT WITH A SIGNIFICANT OTHER:** “I need to remove myself from this conversation, could we talk about this later when we are both feeling less angry?”

IN THE COMMUNITY

- Arranging transportation
- Presenting in court
- Making a complaint
- Paying a check

• **AT THE BANK:** “I don’t understand this statement, can you explain the fees to me?”

• **SPLITTING A CHECK:** “I’d love to go out to dinner. Can we split the check?”

AT THE DOCTORS OFFICE

- Making an appointment
- Reviewing a treatment or recovery plan
- Requesting a second opinion
- Asking for clarification

• **AT THE DOCTOR:** “Before we make a final decision, I would like to get a second opinion.”

• **MEDICAL APPOINTMENT:** “The side effects of this medication are bothering me. Can we discuss other options or choices?”

10 Ways to be Heard

1. Ask questions.
2. Listen! Be interested in what the other person is saying.
3. Think before you speak. People listen when you choose your words carefully.
4. Write down your thoughts and/or rehearse what you will say with a friend or in a mirror.
5. Speak to others in the way you want to be spoken to.
6. Know to whom you are talking. For example, friend, grandparent, or boss and use language and tone that they would find respectful.
7. Know when to stop talking and how to exit a conversation politely.
8. Be willing to compromise and be flexible.
9. Using words like “please” and “thank you” go a long way.
10. Do your research. Find out if what you’re asking for is reasonable.

Questions to Ask Yourself

If you are getting ready to advocate for something you need, think about the questions below. You can review your answers with someone you trust. Role-playing the scenario can also help you to figure out exactly what you want to say and how.

1. What am I advocating for? What do I want?

2. Why is it important?

3. How should I make my request?

4. Who do I need to talk to?

5. Who else will this affect?

6. Is there a compromise or another option?

7. What should I do if my request is denied?

For additional information on self advocacy visit these websites:

<http://www.ncwd-youth.info/tip-sheet/becoming-a-self-advocate>,

<http://www.selfadvocacyonline.org/learning/>

SAMHSA Guide on self advocacy: <http://store.samhsa.gov/shin/content/SMA-3719/SMA-3719.pdf>

Visit us at: <http://www.umassmed.edu/TransitionsRTC>



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Supporting the Educational Goals of Young Adults with Mental Health Conditions



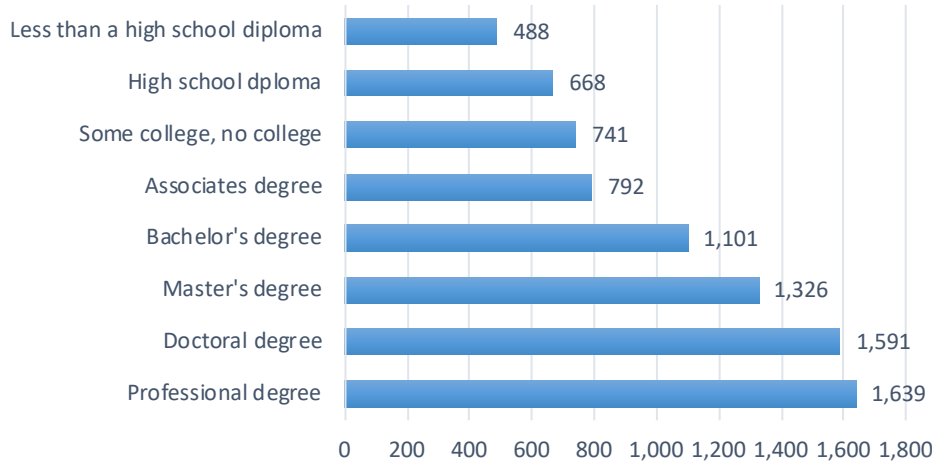
Why Is It Important to Support the Educational Goals Of Young Adults?

College education or training can be the passport to economic self-sufficiency for young adults with a mental health condition. Research has shown that young adults with mental health conditions struggle to complete high school and college more so than any other disability group.¹⁻⁵ However, post-secondary education or training is possible for anyone, especially accompanied by the use of accommodations, assistive technology, and strategic supports. You can help influence a young person to set and achieve a post-secondary education goal.

Post-secondary education is a protective factor that can insulate all people, especially those living with a mental health condition, from long-term unemployment, poverty, and system dependence, including the receipt of Social Security Insurance (SSI).^{6,7} Post-secondary education is not limited to attending a college or university, and includes vocational education, trade school, and on the job training. Any of these types of post-secondary education can provide a pathway out of dead end and entry level jobs and move young adults toward the “primary labor market”, which provides access to jobs that have benefits, such as health insurance and sick time. These jobs also often provide the “informal accommodations” that can make a job a success. It is important to prioritize education for young adults. The sooner a young person can begin to work in the primary labor market the higher the rate of return on their educational investment will be.^{8,9}



Median weekly earnings in 2014 (\$)



Note: Data are for persons age 25 and over. Earnings are for full-time wage and salary workers

Source: Current Population Survey, U.S. Bureau of Labor Statistics, U.S. Department of Labor

Cultivating Motivation Toward Educational Goals

A first step is often to cultivate the interest and motivation to start or go back to school. Sometimes, young adults living with mental health conditions lack role models for completing higher education. Families and others may actively discourage a young person from trying. **Some things you can do to cultivate interest are:**

- Use motivational interviewing skills such listing the pros/cons of college
- Explore what they want to be at age 30; identify any dreams or aspirations related to financial goals
- Tie a young adult's dreams to the education that will be needed to achieve them
- Discuss the benefits of additional education; help young adults recognize the setbacks of not getting additional education

- Learn what are their perceived barriers to higher education and provide solutions
- If the young adult is planning to return to school, discuss their previous experiences to find out what happened. Ask questions such as “Why did you leave” What made school hard? What did you like about school? What did you do well? What did you need help with?” Did you have anything in place before that worked?

Strategies To Help Young Adults Achieve Educational Goals

Refer young adults to programs that have shown success in helping young adults graduate from high school and succeed in post-secondary education. Such programs can work with the young adult to set goals and teach the skills that they may need to develop to do better in school.

These organizations should include some of the following strategies:

- Help young adults to improve their executive functioning skills, that is teach skills essential to college success such as related to calendaring, task management (e.g., to do lists), prioritizing assignments, and breaking down large assignments into smaller manageable tasks.



Other areas to focus on include:

- » Working with the young adult to develop a structured, but flexible schedule for study and class time, develop note-taking & test taking strategies, help to develop/find study groups and tutoring resources
 - » Helping the young to set up a system to maintain organization for individual courses (e.g. 3 ring binders, spiral notebook and folders, setting up laptop folders, Google Calendar, reminders, etc.); and
 - » Teaching the young adult how to put all assignments/deadlines into a calendar/planner and in their phone and help them learn how to prepare for the upcoming week
- Help with financial aid such as completing the required Free Application for Federal Student Aid (FAFSA; <https://fafsa.ed.gov>), identify if there are any loans that are in default, and help to find other sources of financial aid (e.g., scholarships, grants, personal loans, work study, etc.).
 - Check in with the young adult to make sure that they have all of their books and materials by the second week of school
 - Be aware of the add/drop and withdrawal periods. Check-in with the young adult before the end of them to help them assess if the classes and times are a good fit.
 - Let the young adult know that it is common for all students to be stressed by school, especially at the beginning. Explore ways that young adults can reduce stress. Remind them that practicing self-care is even more important during school than when only working.
 - Encourage participation extracurricular activities to develop and promote friendships and social connectedness.
 - Keep on top of grades and attendance in class; do not assume that everything is going well. If the young adult is having problems with attendance, assignment completion, and test taking, ask them what’s happening; for example, ask: “What is keeping you from finishing your assignments/getting to class? Is it always a problem or only sometimes? When is it easy to do it? When is it hard?” Then work with them to find ways to improve.

Acquire Educational Accommodations

- Encourage students to seek out educational accommodations and assistive technology by registering with the Office of Student Disability Services. To do so, young adults may need to explore how their condition affects their ability to perform in classes. If they had an Individualized Education Plan or a 504 plan in high school, ask them to think about what did and did not work.
- Be creative and persistent in acquiring accommodations that are “**outside the box**” of typical accommodations for students with other disabilities and better suited to the unique needs students with mental health conditions.

Some examples of “outside the box” accommodations are:

Advance warning or “pre-processing”:

- ↳ If classes make a young adult nervous, it may help if the professor lays out what is going to happen at the start of class. This allows for “pre-processing” so that s/he can prepare mentally for what’s to come, easing any anxiety about not being prepared for class.



Professors limit or change the way demand responses are requested:

- ↳ Being called upon in class or “demand responses”, can cause a lot of anxiety. Limiting being called upon in class unless a young adult’s hand is raised can be requested as an accommodation. If the professor has established a need for in-class participation that counts towards a final grade, the accommodation can be that the professor prepares the young adult before calling on them in class so that the student has time to ready themselves.

Broken time:

- ↳ If a young adult struggles with having to focus for a long period of time, a “broken time” accommodation may help. “Broken time” is different from “extended time.” Having “extended time” involves having 150% of the time originally given to take an exam, or some call it, “time and a half.” In “broken time,” they work for a period of time on classwork during which they are allowed to take short breaks. They spend the same amount of time on the activity as everyone else, but the time is just broken up.
- * Check out our tip sheet, [Outside-the-Box College Accommodations](#) and [Job Accommodation Network \(JAN\)](#) for more information on accommodations.

What About Going To School and Working?

Some young adults may want or need to work while going to school. Work with them to weigh the pros and cons of both work and school.

Some items to consider during this discussion:

- How much work is needed for income and the ramification for how many classes can be taken
- The flexibility of work and class schedules to accommodate both
- The degree to which work will positively impact their self-esteem and social connections
- The degree to which work hours and energy spent on work will impact school
- Time spent commuting between home, school, and work
- Adequate time for rest, leisure, treatment for mental health or physical health issues, and family/friends
- The important thing for you and the young adult to remember is that s/he can always try out either school only or work and school and then make a different choice during the semester
- Talk about ways that they can strike a healthy work (school)-life balance

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**A Publication of the Systems and Psychosocial Advances Research Center
A Massachusetts Department of Mental Health Research Center of Excellence**



SUGGESTED RESOURCES

Find these other helpful resources at the [Transitions to Adulthood Center for Research Website](#) for publications:

- [Tools for School: Accommodations for College Students with Mental Health Challenges](#)
- [Outside-the-Box College Accommodations: Real Support for Real Students Tools for Schools II](#)
- [What is a 504 Plan and How Can it Help My Teen?](#)
- [My Mental Health Rights on Campus](#)
- [Teens on IEPs: Making my Transition Services Work for Me](#)

Resources for Creating an Education Goal Plan:

- ReachHire - Tapping Campus Resources: <http://reachhirema.org/going-to-school/college-life-pointers-for-success/tapping-campus-resources/>

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Work is Especially Important for Young Adults

Having a job as a youth or young adult is a predictor of long-term work success. Having a job has also been related to improved self-esteem, self-efficacy, and life satisfaction.¹⁻² However, there is a significant gap in work experience for many young adults living with mental health conditions. The lack of experience can become too large to ameliorate later in life.³⁻⁷ Despite this, young adults with mental health conditions are capable of working and they want to work. It is important to encourage and support young adult work efforts as early as possible. Early work efforts can also help foster an identity as a worker and provide experiences that ready young adults for better jobs and more success. Employment builds human capital (skills and experience) that can lead to career paths into the primary labor market, one that provide benefits, informal accommodations, and potential for future financial self-sufficiency. Without human capital, many young adults wind up stuck in dead end, minimum wage and non-benefitted jobs (sometimes called the four F's of food, flowers, filth and filing). Most young adults with mental health conditions are not “too sick to work” and neither is work too stressful for them. Work can contribute to their self-esteem and their long-term success.



The Impact of Receiving Disability Benefits Rather Than Employment Early in Life

Keeping as many young adults as possible off disability rolls and benefits is good for young adults as well as the community. Some clinical providers will encourage young adults to obtain benefits because it provides a safety net. However, in time disability benefits will only support a young adult in poverty. For example, a person receiving Supplemental Security Income would have to pay 133% of their monthly income to pay for a one bedroom rent in Massachusetts. Further, receiving social security benefits can be a disincentive to employment. Less than one percent of Social Security Disability Income and Supplemental Security Income beneficiaries leave the rolls and return to work. There may also be family pressure to remain unemployed if a young adult is receiving disability benefits that the family counts on for income. In these situations, it is best to access benefits counseling for young adults and their families or allies at programs like [Work Without Limits](#) or [Project Impact](#) to allay fears. Help the family understand that while immediate income may be helpful, there are long-term strategies that will provide better income. Educate young adults and families that Medicaid can be continued even when the cash benefit ends; help young adults enroll for Medicaid only and avoid using Social Security benefits as the mechanism for Medicaid (or MassHealth).

Cultivate Motivation Toward Employment Goals

If the young adult is reluctant to seek employment, try these approaches:

- Explore what/where the young adult would like to be at 30 years old; this can help clarify values and preferences in job choices for the present and future and motivate current job search.
- Ask the young adult what they are good at and interested in, because these skills and interests can help identify jobs to try. Identifying good times of day may also be helpful.
- Exposing young adults to peers who are working or have employment goals is critical!
- Discuss the difference between a job and a vocation/career as well as the importance of education and training in starting a career path.
- Explain that college is not the only way to develop job skills. Apprenticeships (usually via trade unions)

- or other skill development courses via job training are also ways to get good jobs with good pay.
- Normalize that work can be challenging and that if one job does not work out, that doesn't mean none of them will. Reference the experience of your own first job or the number of jobs you have held on your own employment journey.
- Use motivational interviewing to help a young person articulate the pros/cons of getting a job.
- Use all opportunities to convey that you believe the young adult can succeed at work and have a career.

Promote Work Experiences

Having an income helps reinforce the value of work, fosters a reliance on work, develops skills (e.g. budgeting), and most importantly, forms an identity that transcends disability. Find ways to promote work:

- Encourage and assist young adults to get work-based learning experiences while in high school (e.g., internship, job shadowing, volunteering, etc.); collaborate with high schools to get related goals onto their learning or special education plan. Find out if they are eligible for Pre-employment Transition Services at school and make the connection.
- Encourage summer employment and other youth-typical jobs like waiting tables, retail, babysitting and landscaping. Every little bit helps to build a resume!
- Encourage consistent work experience; explain that it is a foundation for real career development.
- Provide exposure to and experience with the demands of holding down a competitive job; working through difficult times builds resilience and confidence.
- Encourage attachment to work; not job tenure. It is developmentally normative for young adults to change jobs frequently. With each experience ask: "What did you like about that job? What did you dislike? What are we not going to look for again? Did we learn anything?"
- Over time begin to focus on jobs that will lead to the young adult's intended career goal.
- Don't be afraid to start small. A few hours a week can be a good way to build tolerance and confidence!

Helping Young Adults Get a Job

Sometimes the hardest part is landing those first jobs, these strategies may help:

- Provide concrete direction on how to apply for a job; be familiar with online job boards and application procedures.
- Make sure young adults are taught the basic soft-skills all employers expect them to come in with, such as how to dress, appropriate communication (internal and external), problem-solving, how to ask for help, and time or task management.
- Discuss the pros and cons of disclosing a mental health condition, and what accommodations to ask for.
- Refer the young adult to services and agencies that can provide job coaching and placement, career exploration, and supported employment (e.g., [Clubhouses](#), [One-Stop Career Centers](#)).
- Keeping young adults motivated throughout the process is essential so make sure expectations are reasonable (e.g. Job applicants won't get a call back right away!)
- Check-in regularly and pay attention to any part of the process where it looks like a person might be getting stuck.
- Stay positive and offer encouragement! Getting a job is tough for everyone.

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RESOURCES

For more resources for young adults in this area, go to the ReachHIRE website at <http://reachhirema.org/>.

Find these helpful resources at the Transitions to Adulthood Center for Research website for publications:

<https://www.umassmed.edu/TransitionsACR/publication/#tipsheetEmployment>

- **Do I Tell My Boss? Disclosing My Mental Health Condition at Work**
- **There's More to Young Adult Unemployment Than Mental Health: What to Look For**
- **Workforce Innovation and Opportunity Act and its Application to Youth and Young Adults with Serious Mental Health Conditions**
- **Making it Work: Vocational Peer Mentors for Emerging Adults with Serious Mental Health Conditions**
- **Vocational Rehabilitation: A Young Adults Guide**
- **Supported Employment Adapted for Young Adults with Peer Mentors: A Feasibility Study**
- **Appealing Features of Vocational Supports for Latino and non-Latino Transition Age Youth & Young Adult Consumers: Study Goals & Methods**
- **Entering the World of Work: What Youth with Mental Health Needs Should Know About Accommodations**
- **TAC Priced Out in the United States**

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