

Facilitator's Guide for Backwards Planning Start Where You Want to “End”

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Introduction

Planning for the transition a young person makes from school to the adult world requires a **multi-year** plan that bridges the transition from school-based to adult services. The Backwards Planning process provides a **single** plan, managed by a multi-agency team, designed to guide a young person through high school and into the first years of adulthood as they assume adult roles as an employee, a life-long learner and a community member.

Backwards Planning is just what the name implies: focus first on the **adult outcomes** for the youth's future, then 'plan back' from there to the present in order to define a logical sequence of actions providing the youth with the instruction and experiences to achieve the outcomes.

The Facilitator's Guide is intended as a companion to the *Annotated Backwards Planning Template*. *The Annotated Template* provides a step-by-step example of the development of a Backwards Plan for a case study youth named Jeffrey. This Facilitator's Guide elaborates on the 'thought process' of the team as they build and revise the plan. For purposes of illustration, the case study example depicts each step of the process unfolding as a separate discussion, following the steps in order. In practice, many of the conversations are likely to take place simultaneously. And, because this is a process, by nature making it flexible, the steps may not occur in numerical order. The order of the steps gives a general flow to the process. The order in which the team addresses the steps should be guided by the needs, priorities and preferences of the youth.

The Backwards Planning Process

Backwards Planning is a way to think. It is most effective when used by a **multi-agency** team, including the youth and his/her family. Processes are less rigid and more flexible than procedures. Procedures are useful when a uniform or standard result is required. In the context of transition, the ultimate result for each and every young person is the same: a satisfying, fulfilling, meaningful adult life. However, for each young person with a developmental disability, the way along the path will be different, as the plan is designed and evolves to respond to his/her **unique needs** for instruction, services, supports, experiences, agency linkages and opportunities. This requires the use of a flexible planning process.

Every good plan **begins with the end** in mind. The same is true of planning with a youth for his/her transition from school to adult life. Use the Backwards Planning template to document planning ideas, many of which can be incorporated into components of agency required documents. The Backwards Planning process provides a way for a multi-agency team to **plan across several years**. This way, the team can view the plan holistically and look for disconnects or gaps. The process begins with comprehensive team discussions guided by the individualized transition assessment information and data that structures the sequence of the conversation without limiting thinking or decisions.

Why Backwards Planning?

Since the Backwards Planning Template is not an official form or document, it can be revised, changed, or years added at any time and as often as necessary. By using an '**agency neutral**' document, the focus remains on the youth and his/her goals, not limited by any one agency's parameters or requirements. Backwards Planning will capture the necessary information and elements that each agency can utilize in specific agency documentation.

Backwards Planning provides a way to **share ideas and be creative** in defining the youth's journey along the path to community employment and adult life. By first describing the instruction, services, supports, experiences agency linkages and opportunities necessary to address the youth's needs, the team can determine how and when to **combine and blend commitments** from each agency.

Who Can Use Backwards Planning?

The short answer....EVERYONE!

All agencies must gather information and document activities specified by law within certain criteria in order to serve transition youth. However, agency documents do not necessarily reflect the **holistic nature** of the individual's plan for transition to adult life. In the necessary effort to ensure documents such as the IEP, IPE and ISP are compliant with state and federal law, the document's ability to **communicate a long term**, multi-pronged plan is often lost. The Backwards Planning tool offers a way to preserve and communicate to current and future service providers the essence of the youth's desired adult pathway.

Getting Started with Backwards Planning

To be effective, Backwards Planning requires some preparation. A multi-agency team is critical to ensuring that appropriate linkages are made to adult services while the youth is still in school. Depending on current practice, assembling a group of people from different agencies may be simple or take some time. If there are already relationships in place, calling people together is an easier task. A few simple preliminary tasks are described below. Jeff's case study illustrates how each step might look in practice. A copy of Jeff's completed plan is available in the document Backwards Planning Template – Steps. It may be helpful to have a copy of Jeff's completed plan as you work through the Facilitator's Guide. All of the Backwards Planning tools are available at the Employment First website, www.ohioemploymentfirst.org.

Multi-agency Team

A team of people that represent and provide information about both the school and adult services expands the potential of the team to insure a smooth transition to adult life. It provides the youth and family an introduction to a contact person in adult service systems. This also affords the school-age youth and his/her family the occasion to learn about how adult systems have different eligibility standards and differing ways of providing services. A team will likely include people that know the youth well and others that can provide services and support for now and in the future. Teams frequently include the youth, family, members of the IEP team, representatives of career-tech education, adult services, County Board of Developmental Disabilities, Opportunities for Ohioans with Disabilities Agency (formerly RSC), mental health, One Stop Centers, etc. depending on the student's needs and plans. Listing the team members' names and agencies creates a record that can be useful for continuing communication and into the future as the youth moves into adulthood and agency personnel change. The Backwards Planning Team Contact List can be used for this purpose.

Jeffrey's team includes his mom and dad, Mr. Thomas, Intervention Specialist at his high school, Ms. Leland, Intake Coordinator, County Board of Developmental Disabilities, Mr. Griffin, Vocational Rehabilitation Counselor for the local Opportunities for Ohioans with Disabilities Agency (formerly RSC) office and Ms. Perez, Transition Coordinator from the Educational Service Center.

Mr. Thomas hosts a Transition Fair for parents and students every year and knows all the individuals involved.

Assessment Information and Data

A solid transition plan is dependent on valid and rich assessment data and information. For youth still in high school, the primary source for that information will come from the school, youth and family. The youth's IEP must contain Age Appropriate Transition Assessment in the IEP in effect when the youth becomes 14 years of age. This, and information from other areas of the IEP as well as information from the youth and family, will provide information and data as a starting point for the team to develop a Backwards Plan.

Adding to and becoming more focused in gathering data and information will naturally become part of the Backwards Plan. The data and information serve two critical purposes:

- Describes the youth's preferences, interests, needs and skills so the team can 'get to know' him or her

The team will be able to start by reviewing the current information and data available about Jeffrey.

Jeff's family may consider a community living situation at some point in the future; for now he will live at home. They are concerned about his safety and ability to make daily living decisions on his own. His family sees him employed in the community doing work that uses his skill with his hands and his interests in tools, computers and plumbing. He likes to attend sporting events in the community.

Jeff has good eye-hand coordination and achieves high scores on video games that he enjoys playing with friends. He is also perfectly content by himself, playing games or watching TV. He is adept at using hand tools to take things apart, such as computers and plumbing, and will do so without close supervision at home and school. He does not put them back together.

- Provides baseline for the team to gauge progress and effectiveness of the plan and forms the basis for making data-based decisions about needed services and supports

The team will be able to get started by reviewing the current information and data available. Engaging in Backwards Planning will allow the team to identify what additional information is necessary and be able to plan as a team for effective strategies for gathering it. The Transition Assessment Planning Guide may be helpful in this process.

Jeff does not monitor his own appearance or remember to wear clean clothes, shower or comb his hair. His speech is limited and often unintelligible to strangers, although that doesn't prevent him from attempting to engage people at the mall, for example, in conversation. Jeff acts out when he can't engage in or continue a favorite activity. Transition to a new activity is very difficult. Jeffrey is scheduled to complete a career assessment this year.

He is currently included in general education classes for English, Gym and Math, working on a modified curriculum in core subject areas. He is easily distracted in larger classes and tends to get caught up in watching others rather than attending to his own assignments. He will stay on task and complete his work when rewarded with video game or television time.

Adult Goals

Backwards Planning is dependent on having a "destination" or outcome. By first assisting the youth to identify his or her intended adult outcomes, the team can make better decisions about what and how much needs to be accomplished each year along the way. With outcomes to anchor the plan, the team has a context for determining the priorities for the youth's high school program. They can consider the academic and independence skills critical to achieve the youth's post school intentions.

If the youth is 14 or older, the team starts by reviewing the post school goals that must be written in the IEP for employment, continued education and independent living (when data indicates a need).

Early in the process, adult outcomes may be more general in nature. Over time the outcomes will become more focused and specific through implementing the Backwards Plan and continuing discussions with the youth and family. Backwards Plans may include activities to further refine or revise the goals and to identify the youth's preferences, interests and skills in adult environments.

After completing high school, Jeffrey will work in the community at a job that allows him to use his interests and skills in working with hand tools.

After graduation from high school Jeffrey will attend adult education classes that extend his ability to live safely on his own.

As an adult, Jeffrey will live at home immediately after high school but will move into a supervised group home in the future.

Team Meeting and Discussion

In some situations, individuals may be coming together as a group for the first time to Backwards Plan. People may need a chance to get to know each other, build professional relationships and learn about other systems' requirements and practices. The group will need time to become a 'team'.

Team members need to have a shared understanding about the youth's adult plans. This means that for purposes of planning, team members imagine the young person as an adult, learning, living and working in adult environments

Mr. Thomas emailed some possible dates and times to the team members to schedule a transition team meeting in March 2013. Jeff's dad is only able to get off work early on Wednesday's so the team agreed on a date on that day. Mr. Thomas arranged for Jeff to miss Gym class that day.

The purpose of this meeting is for all group members to get to know each other and Jeffrey and to review assessment information and post school goals. Mr. Thomas suggests that the team begins working from a Backwards Plan in the fall when school begins. The team

that are aligned with the youth's preferences, interests, needs and skills. All team members need to agree that they are willing to commit to implementing a plan that affords the youth all the opportunities necessary to realize his/her intended outcomes.

Some youth, especially those that are younger, may have what some consider 'dream' or 'unrealistic' aspirations for adult life. Often this is an indication of lack of exposure to careers and the world of work. Regardless of how 'out of reach' a youth's adult plans may seem, any stated outcomes afford the opportunity to explore the youth's interests and preferences. Further discussion with the youth and family can help the youth sort of viable career options from those that will enrich his/her life as hobbies or leisure activities.

Before starting to plan, assure all team members understand and support the direction of the identified outcomes.

agrees that they should schedule at least two more hour-long meetings to pull the details of the plan together. With the summer school break and everyone's schedule this will take a couple months to accomplish.

The team reviews the assessment information gathered so far and post school goals on Jeff's IEP and agree to support Jeff in achieving these outcomes. As a team, they agree that the Backwards Plan needs to include more assessment to learn about Jeff's skills, needs and interests as an employee, to better define his post-school employment goal. The team schedules the next meeting for 3 weeks later.

Using the Backwards Planning Template

The Backwards Planning Template structures a Person-Centered thinking process for the team to develop a single transition plan that guides activities and services provided by all team members. Follow along with the example of Jeffrey's Backwards Plan by reading the text at the right. The Annotated Backwards Planning Template provides a more complete example of the Jeff's Backwards Plan.

Step 1 – Youth's Name and Birthdate

Backwards Planning is a person-centered process and it will be important for the team to remain focused on the youth and his/her future. That means that the services and commitments made by the agencies represented by the team members are determined based on data and information about the youth and not based only on what is 'typically' done or 'available'. Planning in a manner that is person-centered often means the team needs to be creative and collaborative in providing services and supports the youth needs instead of providing only what any single agency might have the capacity or resources to provide. Listing the birthdate will help the team, whose members may change over time, keep sight of the youth's age. This plan is being developed to cover a span of years and the birthdate will be a quick reference for the youth's current age.

Mr. Thomas convenes the team's second meeting for the purpose of beginning to Backwards Plan. Jeff's dad was unable to attend. Jeff and his mom will share the plan with him and he can email Mr. Thomas with any questions or input.

In the time scheduled for the meeting, the team agrees to complete as much of the plan as they can and meet at another time to finish it.

Mr. Thomas filled in Jeffrey's full name and birthdate from his records. Jeffrey is currently 14 years old and a 9th grader, at the time of this meeting. He will turn 15 in May.

Step 2 – Discuss and decide the duration of this plan

A Backwards Plan needs a starting and ending point. The template provides several columns to use. Backwards Planning can begin and end at any point and for transition planning with youth of any age. A good time to start is when youth are still in school and about to turn age 14, the age by which transition must be formally documented in the IEP. That affords an optimal amount of time for a multi-agency team to provide the youth with the instruction, services, supports, agency linkages, and experiences to prepare him/her for adult life. When the duration of a Backwards Plan continues beyond graduation, it also offers the opportunity to provide continuity of service while transferring primary responsibility from the school to adult service providers. The beginning and ending dates define the number of years for the plan. The end date of the plan becomes the starting point for Backwards Planning.

The team agrees the plan will begin in the fall and list a date near the beginning of the school year. They discuss if the plan should end when Jeff graduates or if Jeff will benefit from having a plan in place for the first few years beyond graduation.

They determine it will be in Jeff's best interest for the plan to end in 2019, 3 years after Jeff intends to graduate from high school. Mr. Thomas filled in the agreed upon dates on the Backwards Planning Template, making this a 6 year plan for Jeff.

Step 3 – Discuss and determine the youth's graduation year

The Graduation Year (or year the youth will exit high school services) may, in many cases, be the same as the Milestone year (plan end). However, graduation may occur at some other point in this plan. Discuss and decide at what point graduation will occur.

Make a thoughtful, informed decision about options to complete graduation requirements and gain the academic background/skills/experiences needed to achieve post school outcomes. This decision gives clear definition to the number of years of high school education that will allow the youth to complete graduation requirements and achieve the milestones critical to realizing his/her post school intentions. The 'graduation year' decision helps set the priorities and the pace of the plan activities. Review this decision often and adjust the graduation year as necessary. No matter where in the plan graduation occurs, it will be important for the team to determine how services might change and how they will continue to be funded and provided after graduation.

Jeff is currently on track credit-wise to graduate in 3 more years. His curriculum is modified for core subject areas. He will participate in the Ohio Graduate Test (OGT) Alternate Assessment for Students with Significant Cognitive Disabilities (AASCD) during the coming school year. Jeff's IEP team will revisit this decision. Mr. Thomas added the year '2016' to the Graduation Year space on the Backwards Planning Template.

Jeff's plan includes 3 years when the school will have primary responsibility for services and three years when adult serving agencies will have primary responsibility. The team makes a note that consideration of Jeff's eligibility for adult services will be critical for his success.

Step 4 – List Team Coordinator's Name and Contact Information

To truly operate as a team, someone needs to assume responsibility for 'coordination' for the entirety of the plan and all activities within it. If the youth is still in school, a school employee is likely the logical choice since they would be able to coordinate services within the Backwards Plan with the IEP and the school has legal responsibility for the youth's school program. As the youth approaches graduation and when the Backwards Plan spans beyond graduation, team members representing other agencies may be in a better position to provide entire plan coordination. The Team Coordinator may change over time.

Mr. Thomas called together the team initially and facilitated the first couple meetings. However, Ms. Perez, Transition Coordinator for the Educational Service Center, offered to provide coordination from this point forward. The team agreed. Ms. Perez put her name and contact information on the Backwards Planning Template.

As they move forward, the team will need to discuss who will coordinate the plan after Jeff graduates.

Step 5 – Identify the youth’s intended outcomes

The youth’s adult outcomes are the focal point for the Backwards Plan. They provide the point of reference for the activities the plan will contain. The activities listed in each column on the template are the intended steps to achieve the outcomes. If the youth is still in school and at least 14 years of age, his/her IEP will include post-secondary goals. The team should start with these goals as the adult outcomes.

For Backwards Planning with youth who are already out of school or younger than age 14, the team should review other information available about the youth, and most importantly discussing future plans with the youth, family and others who know him/her well.

To move forward with planning, the team will need to have a shared understanding of the youth’s intended outcomes and agree to support them. The team may need to continue discussion or modify the outcomes until consensus is reached.

The team had briefly reviewed the post school goals listed in Jeff’s IEP at the initial meeting. They agree to support Jeff in achieving these goals. The team discussed the need to better define specific types of jobs for Jeffrey that are a vocational match with his preferences, interests, needs and skills. They agree to keep this in mind as they build the plan. They also want to get more information about his functional limitations as they relate to working and living in the community.

Mr. Griffin suggests expanding on Jeff’s Adult Education Outcome by adding job specific training. The team agrees.

Mr. Thomas will take this amendment to Jeff’s IEP team for consideration.

Step 6 – Identify Milestones

In the column at the far right of the Backwards Planning Template labeled ‘Milestones to be achieved’ identify what the young person needs to accomplish by the ‘end year’ of the plan in order to move towards the adult outcomes. Answering the questions below will help the team identify the ‘milestones’. Think into the future and imagine what will need to be in place for the youth to be successful in achieving the adult outcomes. The team should discuss the current assessment information to determine the priorities that are vital to the youth gaining the skills and experiences to achieve the adult goals.

In relation to the adult goals:

- What will he/she need to know and be able to do?
- How independent will he/she need to be?
- At what level of skill will he/she be expected to perform?
- Will he/she require ongoing and long-term supports and services?
- What referrals or linkages to adult or community agencies will provide needed supports and services?
- At what point in the plan should any linkages be made?

Jeff’s team turned their attention to what Jeff would need to have in place at the ‘end’ of the plan in order to have the necessary skills to assume adult roles. Jeffrey’s team discussed what worker and job seeking skills he would need to find and keep a job in the community and the need to provide him with community based experiences to define the types of jobs that are a good fit with his skills and interests.

They also looked at how independent he would need to be in order to be successful in living in a group home and getting around the community and to and from work. They recognize that he will need ways to communicate with co-workers, friends and people he encounters in various everyday places in the community.

Jeff’s mom expressed a concern about Jeff’s untidy appearance. When asked, Jeff said he just had more important things to do than take a shower or brush his teeth.

After additional discussion, the team decided on the Milestones and listed them on the Backwards Planning template.

The team decides to plan for Jeff to have accomplished these Milestones by the plan ‘end date.’

Now that the team has looked into Jeff’s future, the next step will be to focus on the here and now.

The Milestones anchor the entire plan. They provide the point of reference for decisions that are made.

Also project the date when it is expected the youth will achieve the milestones. In most cases this will be the same as the date the plan ends.

Step 7 – Current Assessment

Time to turn attention to the here and now! In the far left column on the Backwards Planning Template labeled 'Current Assessment' describe the youth's current skills, knowledge, abilities, or connections related to each of the milestones identified in the right hand column. By first describing the desired milestone (right column) and then secondly identifying the current status of that same skill or ability (in the far left column), the team can discuss what needs to happen in the years in-between in order to "fill the gap" so the youth can realize success.

"Current assessment" is generally considered to be formal or informal data and information that has been gathered within the previous calendar year.

At the preliminary meeting where all team members first met each other, they also briefly reviewed current assessment information in Jeff's IEP. Now they will consider this information to identify what they can use as baseline or a starting point in relation to the Milestones.

Where there is a lack or absence of information that provides a starting point, they will make note of the need to gather that data. They identify those items that provide baseline for the Milestones and list them in the Current Assessment column.

The hour the team scheduled for this meeting is nearly up and they decide to schedule another meeting to complete the Backwards Plan. Mr. Thomas reviews the rest of the process that will be accomplished at the next meeting. The team will identify the Steps necessary for Jeff to close the gap between his status now in reference to the Milestone and describe what he needs to gain and/or have in place.

Ms. Perez makes copies of the Template for each team member so they can think about possible Steps in the meantime. They are able to schedule a meeting for 2 weeks later.

Step 8 – Steps to Achieve Milestone

Now that the two anchors are in place, the Milestones that define targeted achievements and the Current Assessment that defines the starting point, the team is ready to Backwards Plan. Next the team identifies the Steps needed to move from the youth's current status to how he/she will acquire the skills indicated by the Milestone.

Begin thinking backward. In the year immediately before the Milestone year, what instruction, service, support, experience or linkage should be provided in order for the youth to be on pace to accomplish the Milestone? Write the team's ideas in that year's column.

Continue to plan backwards, addressing each column to the left until the team has identified a progression of steps from the current year to the Milestone year. These

At the meeting, Mr. Thomas used his computer and projector so all could see the plan. Ms. Leland, school-age Intake Coordinator for the County Board of DD was unable to attend in person but is participating from her office via an online meeting platform where she can see the plan and take part in the discussion.

Jeff and his team looked at the gap between his status right now and what he needs to have in place at the end of the plan. Looking into the future, they talked about what Jeff would need to be doing in the year just prior to the end of the plan. For Jeff, graduation will occur in 2016 or three years into the plan. The final three years of the plan, Jeff intends to receive services from OOD (formerly RSC) and the County Board of DD.

elements are the “big picture” features of the year that focus the team on transition related activities as they move forward. The ‘Milestone year’ services, activities, instruction, supports, etc. provide a point of reference for how much and at what pace progress and activities need to be accomplished across the years included in the plan.

Be sure to consider Evidence Based Practices for transition. Find out more about EBP at www.nsttac.org

As the team continues to plan backwards, each column will include information describing what the youth will accomplish within a specific span of time. The team will want to consider how long it will take for the youth to achieve the skills, experiences, activities, and linkages that are listed. The team can base their time line projections on:

- their professional judgment and experience
- knowledge of and experience with the youth
- understanding of how/when the youth will need to connect with various adult serving systems

On the Backwards Planning template, the team can write in the time span at the top of each column. For youth still in high school, the team may decide to use the dates for a school year or for an ‘IEP’ year.

If a plan also includes time after graduation, a calendar year or another time span that naturally coincides with other timelines in effect may be more useful. For example, a team creates a 6-year plan for a youth who is 15. The youth plans to graduate at age 18, so the first 3 years of the plan reflect IEP years. After graduation, this young adult is served by DODD and OOD (formerly RSC) so the last 3 year time increments of the plan are dated to coincide with ‘phases’ of job search and job support follow-along.

Not all items listed in a column will require the entire span of time listed at the top to complete. For example, instruction on a specific skills make take an entire school year while a referral to an agency, listed in the same column, may only take a few hours.

Step 9 – Implement, Revise and Update Plan

Once the plan is developed, it must be implemented, reviewed, revised and updated as activities are completed, new assessment data and information is gathered and the youth’s Adult Outcomes change or become more focused.

Once all team members have a copy (paper and/or electronic) of the plan, making updates may not require an in-person meeting.

Jeff turns 15 soon. Ms. Leland explained that when he turns 16 Jeff would need to re-establish eligibility for County Board of DD services through an assessment called the OEDI. Mr. Griffin from OOD (formerly RSC) explained that Jeff would also need to complete the referral process to be eligible for transition services through his agency. The team will keep these in mind as they complete the plan.

Once the ‘year before’ the end of the plan Steps are identified, the team continues to plan backwards in the same manner to identify the Steps for the rest of the years in the Plan. Milestone by milestone, they determined what Steps needed to occur during each year to achieve the Milestone listed in that row.

The team needed to define the time span for each year (or column) in the Backwards Plan. Jeff will still be in school for the first 3 years of the plan and dates for those columns coincide with the school year. The team considers the types of activities listed in the columns for the final 3 years and made a projection about appropriate time spans that would logically coincide with the proposed adult service based activities. They agree the time spans might need to be adjusted at a later time.

The time scheduled for this meeting comes to an end, Mr. Thomas makes copies of the completed plan for all members and they agree to meet again in August to assign responsibility to team members to implement all components of the plan. Mr. Thomas will do some informal interests and preferences inventories with Jeff during the remaining weeks this school year.

The team agrees on a date for a meeting in August.

Ms. Perez, ESC Transition Coordinator sends the team a reminder and agenda for the upcoming meeting. The team had decided at the previous meeting, that they needed to meet in person.

Mr. Thomas updated the team about the results of informal preferences and interest inventories Jeff took in the spring. Jeff showed a keen interest in mechanical parts and a clear preference for jobs that required a lot

Someone to coordinate the implementation of the plan is critical at this point to ensure all members stay actively engaged in the plan, with the chance to weigh in on proposed changes and updates. Each member, including the youth and family, will likely have responsibility for implementing some facet of the plan. A coordinator who can stay on top of plan activities acts as the central point person each team member can report to and who then can communicate with all other team members.

A coordinator would also be responsible for ensuring that information required for any adult agency referrals or intake processes is completed.

Establishing a regular schedule of dates for Progress Checks is an effective way to manage plan activity and to keep everyone in the loop. Not every Progress Check will require an in-person meeting. Many times, the coordinator would be able to update members by phone, email or online meetings.

The Backwards Plan is a dynamic document. It is expected that it will change over time. Since it is an informal document, not directly tied to any one agency's procedures or requirements, each team can set its own schedule for updates and/or revisions.

Changes made to the Backwards Plan may impact activities and commitments made within agency documents. For example, additional assessment may reveal that a youth's Adult Employment Outcome is not at all a good fit for the youth's career interests and skills. At the Progress Check meeting, the team makes changes to the Outcome and some of the activities planned for the current and future years to be in line with a different career direction. The youth's IEP and any documents in place with adult agencies may also be impacted by this change. Each professional on the team should determine how and when changes to the Backwards Plan require changes to official agency documents and commitments.

of movement and physical activity, such as operating equipment, lifting, stocking shelves.

Mr. Thomas shared that Jeff attended an orientation with the rest of the school at the Career-Tech Center, where he spent about 2 hours in an Auto Tech lab. Mr. Thomas was concerned, based on Jeff's distractibility in large groups, with Jeff's ability to follow the Lab Teacher's directions. However, even though the lab was a noisy and very busy environment, Jeff was focused and attentive throughout the time. Jeff volunteered and successfully followed the teacher's directions to remove a tire using an air impact wrench. The Lab Teacher was not aware of Jeff's disability but naturally provided him with verbal prompts to complete the task and gave Jeff positive feedback.

Mr. Thomas has some ideas about updating the plan to reflect new information about Jeff's interests and preferences. He added new ideas and information for the team to review.

Ms. Perez asks if Jeff's lack of effective communication skills may be a barrier to accurately identifying his abilities. Other team members concur and agree it will be critical for him to have a comprehensive speech and language assessment and consideration of the use of assistive technology. Mr. Thomas agrees to stay on top of the speech/AT evaluation that is scheduled for the next week.

The team then reviews the plan to assign responsibilities to various components that require action. Ms. Leland addresses the eligibility process for Adult Services through the County Board of DD and clarifies the procedures for the team. Jeff was administered the COEDI at age 8, found eligible, and an SSA has been working with his family on issues of transitioning from one activity to another at home and on having him take responsibility for his grooming and hygiene. At age 16, Jeff will need to be administered the OEDI to continue services through CBDD. Jeff will turn 16 near the end of next school year and she will arrange for the necessary steps for eligibility at that time. The plan is revised to reflect this change.

She encourages Mr. Thomas to involve the current SSA, Ms. Williams, in future team meetings and IEP meetings. The same behaviors she is addressing with the family are of concern within this plan and they should join forces and use consistent approaches.

Mr. Griffin suggests completing the referral and intake process for OOD (formerly RSC) this year so Jeff could be served, if eligible, for some of the assessment activities specific to exploring jobs through development of a Vocational Exploration IPE. Jeff needs to identify specific occupational areas as the basis for an Exploration IPE.

The rest of the items in the plan for this year are also in Jeff's IEP and Mr. Thomas will take responsibility for referrals to school based related services for speech/language, assistive tech and orientation and mobility for travel training. The district is already working on an FBA regarding the difficulty with transitions between activities.

Ms. Perez suggests that she conduct the ELSA (Employability Life Skills Assessment) to establish baseline and identify skills to target for improvement for Jeff's worker skills and grooming. Ms. Perez has also referred Jeff for a formal Career Assessment, which he is scheduled to complete in October at the Career Center. Mr. Griffin expresses an interest in meeting with the Career Specialist once the report is done as this will assist in developing an Exploration IPE. Ms. Perez will arrange.

With a completed Backwards Plan and a process for sharing information, assigning responsibility and providing regular updates, the team felt they have established a way to work together in the future. They set a schedule for Ms. Perez to inform them of new information and for the team to determine whether or not a meeting was necessary.

Step 10 – Use Backwards Plan Components as the basis for documentation in Required Agency Forms and Procedures

Much of the information in the Backwards Plan can be documented within official agency documents. For example, the Adult Employment Goal could be used as the basis for the Measurable postsecondary goal in the IEP, a Vocational Goal in an IPE and the Community Employment Goal in the ISP. The same is true of services and activities that are identified in the plan. All agencies will be able to make use of assessment information gathered in the Backwards Planning process.

Some restatement of the items in the Backwards Plan using agency terminology may be necessary.

Co-planning the actions within the plan increases the likelihood that items will meet the needs and requirements of various agencies. Often, similar assessments are completed separately by agencies because required types of information are not gathered or documented. For example, a school might arrange for a youth to be observed in a community setting to document on-task behavior. While adult serving agencies would also be interested in on-task behavior, the data would need to document the youth's 'functional limitations' in the community setting to be useful to the agency. By co-planning such an assessment, all parties can gather the information they need, making the process of gathering assessment data and information more time and resource efficient.

Mr. Thomas is using Jeff's Adult Outcomes in all three domains as the Postsecondary Goals for his IEP. He is also restating several of the Steps (referral for vocational evaluation, OOD (formerly RSC), County Board of DD, Speech and AT, Orientation and Mobility) as Transition Services, the Steps concerning transitions between activities and grooming/hygiene as annual goals and everything concerning assessment as Age Appropriate Transition Assessment.

Ms. Leland will share information with Jeff's current SSA to see how she might use it in his ISP.

Once Jeff completes the referral and eligibility process, Mr. Griffin will use the Adult Employment Outcome as a vocational goal for his IPE and information from assessment (including the formal Career Assessment). He feels additional community based assessment provided by OOD (formerly RSC) will be helpful to understanding Jeff's levels of skill and functional limitations.