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## Synopsis

I began teaching junior high special education three years into my career, and discovered a desire to not only help my students succeed in adolescence, but in adulthood as well. I quickly found many parents and students felt lost and hopeless when looking toward the future, and I didn't have the tools to help them. I chose to further educate myself so that I could help them understand the possibilities that were available. The Transition Specialist Master's Program has taught me best practices which I have used to help my students plan and practice for success in adulthood. I have the tools now to better educate parents and teachers in the many possibilities for these youth with disabilities.

During my career in junior high, I have been able to provide many transition assessments. This is the first introduction to transition planning for my students and their families, and I enjoy being able to discuss with them their hopes and dreams for the future, and help parents realize the strengths and skills their child has, based on these assessments, which will benefit them in their future goals. I have been able to use transition assessments not only to make appropriate transition plans, but also to set up work experiences that meet my students' strengths and preferences.

I have provided professional development to other teachers working in transition. I enjoy passing on the information I have learned and researched to my colleagues. I often collaborate with other teachers, especially general education teachers, in making goals and plans for my students to help meet their individual needs.

My career goals include working at an adult transition program, providing training to other educators and parents on transition planning and programming, and creating a program where students can be successful in their postschool outcomes. My vision is to continue to educate students, parents, and teachers on best practices in transition planning and programming, and to implement those best practices in my teaching and interaction with individuals with disabilities.

# Research Literature Review

Introduction and Research Literature Review

Alternatives to Guardianship

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## Introduction

The Individuals with Disabilities Education Act (IDEA, 2004) promotes high expectations, self-determination, and autonomy especially in transition planning. Specifically, IDEA states that children with disabilities should “be prepared to lead productive and independent adult lives, to the maximum extent possible” [33(5)(A)(ii)]. Guardianship, although a well-intentioned concept, may be viewed in some instances as a restriction of productivity and independence for adults with disabilities. Both presently and in the past, research has shown that full guardianship is primarily recommended to parents of youth with intellectual disabilities (Jameson et al., 2015) and full guardianship limits, or removes, the choices of individuals with disabilities. Full guardianship is a legal process in which the courts appoint a person or organization to make all of the decisions for the person whom the courts have termed incompetent (Jameson et. al., 2015; Rood, Kanter, & Causton, 2015). The promotion of full guardianship, or the inability to make choices for oneself, and the ideals presented in IDEA, especially self-determination, or the ability to make choices for oneself, are in direct opposition of each other (Millar, 2007; Rood et al., 2015).

Rood et al. (2015) recommended that transition planning include planning for age of majority (or transfer of rights), specifically examining and planning for alternatives to guardianship. They recommend as part of this process, teachers, along with parents and families, need to know alternatives to guardianship in order to meet the goals of IDEA for each student. Alternatives to guardianship “provide support to people who may need help making decisions, rather than deny them their right to exercise decision making over their own lives” (p. 321). In their research, Payne-Christiansen and Sitlington (2008) stated that discussions of guardianship need to occur during the transition planning process and should be based on transition assessments which focus on students’ strengths, preferences, and weaknesses. The transition team should use these assessments to drive goals that will prepare students for adulthood, including “the demands upon the individuals to act autonomously and to self-

advocate as well as to assume the legal rights that are given at the age of majority” (p. 8). This research indicated that the transition teams should be planning for alternatives to guardianship that will help the individual successfully navigate their adult lives based on their individual strengths, needs, and weaknesses.

There are many alternatives to guardianship. These include a representative payee to help with budgeting and spending, joint bank accounts, power of attorney for specified decisions, case management services, limits on credit cards, etc. One option that much of the research discusses is supported decision-making, which incorporates a range of models but allows the individual with disabilities to make the final decisions. In supported decision-making, people use trusted family members, friends, or professionals to give them the help they want in understanding situations and making decisions. With supported decision-making the person with disabilities has the final say and retains control over their lives (Jameson et al., 2015; MacLeod, 2017; Millar, 2007; Payne-Christiansen & Sitlington, 2008).

In their study, Jameson et al. (2015) stated that only 12 out of 305 responses of parents interviewed reported any sort of training or education regarding guardianship as coming from school professionals. Researchers reported that the individualized education program (IEP) process prompted parents to seek out information about guardianship but were not provided training or alternatives in the school setting. These results indicated that school professionals, especially teachers in transition, needed education and training about alternatives to guardianship. Payne-Christiansen and Sitlington (2008) reported that teachers involved in their study only recommended full guardianship and reported to know very little concerning guardianship. Each teacher assumed that one or more of their colleagues knew more about guardianship than they did.

From the research, it is clear that full guardianship is most often recommended for people with disabilities, and that educators need to receive training on the full range of alternatives (Jameson et al., 2015; Millar, 2007; Payne-Christiansen & Sitlington; Rood et al., 2015). School professionals, specifically those teaching students with disabilities, need to know the alternatives to guardianship and plan for them in their transition planning. Understanding the alternatives will allow them to better support their students in reaching goals to live self-determined lives as stated in IDEA, and better support parents and families in planning for alternatives for guardianship that will be successful for their individual student.

### **Research Literature Review**

Using EBSCOhost, Education Source, and Google Scholar, I searched for articles about alternatives to guardianship for people with disabilities using search terms including *alternative to guardianship and disability or disabilities or disabled*. This search brought up 25 articles. I found three additional articles by reviewing the literature and reference sections of related articles. Of these 28 articles, I examined eight which seemed most relevant to alternatives to guardianship for youth with disabilities, and only four of the eight involved experimental research. I limited my research to four studies concerning alternatives to guardianship with transition-aged youth (Jameson et al., 2015; MacLeod, 2017; Millar, 2007; Payne-Christiansen & Sitlington, 2008).

Millar (2007) investigated the perspectives of six focus groups which were comprised of students with disabilities, their parents, and the educators that worked with these students, regarding guardianship and young adults (age 18 years) with disabilities. The participants were chosen from a mid-west school district, which had a reputation of providing quality transition services. The district had a diverse student population, many high schools, and a transition center for students age 18 years and older to focus on transition. The participants with disabilities all had the same criteria for eligibility which included a classification of moderate cognitive impairment, at least 18 years of age, and parents who were willing to be involved in the study. All special educators selected worked with students who

were at least 17 years and older and were considered by the district to be experienced in transition services. From the participants selected six focus groups were formed. The first focus group consisted of six students who had an appointed legal guardian (a parent). The second group consisted of seven students who did not have an appointed guardian. The third group consisted of the parents of group one (they were the legal guardians). The fourth group consisted of the parents of group two (they were not the legal guardians). The fifth group consisted of seven special educators who worked at the transition center. The sixth group consisted of 10 special educators who worked in a high school setting.

Each focus group was given consent forms and a list of the focus group questions.

The focus questions were:

1. What is the first thing that comes to mind when you hear the term guardian?
2. How does someone 18 years of age and older get a guardian?
3. What are your experiences, if any, with someone who is of legal age and has a guardian?
4. What, if any, guardianship alternatives are you aware of, and how did they work?
5. What type of curriculum does your school emphasize? (academics, life-skills, self-determination skills).
6. Where did you first learn about guardianship as it relates to adults?

The answers given were then transcribed and coded by the author and assistant to show inter-coder reliability. Main themes and sub-themes for each group were determined, and data was compared across groups.

The findings were categorized into common results across the groups and unique results to each group. The common results included ideas of what a guardian is and how to obtain a guardian. They also included a limited awareness of alternatives to guardianship, especially in the two groups which had a guardian or had obtained guardianship and both groups of educators. The unique findings included the

reasons why Group Three obtained guardianship and why Group Four did not. The major findings of the study, as stated by Millar, were that the majority of participants believed they exhibited and/or promoted self-determination, but they did not recognize the disconnect between self-determination and guardianship. Also, the majority of participants had limited understanding of guardianship and alternatives to guardianship. Millar concluded that based on the findings of the study, transition planning needed to include guardianship and its alternatives, and that to do so educators, students, and families needed to have information about guardianship and alternatives to guardianship (Millar, 2007). This research was furthered by Payne-Christiansen and Sitlington (2008) who used the findings of Millar (2007) and focused their research on the importance of transition planning and guardianship.

Payne-Christiansen and Sitlington (2008) investigated three questions related to guardianship: (a) the beliefs of the people involved in deciding the need for guardianship for young adults with disabilities, (b) the main theories that could explain some of these beliefs, and (c) the relationship of transition assessment and planning, self-determination, and age of majority to the process of guardianship. The participants of this study included one student (Evan) who had developmental disabilities and had just gone through the guardianship process, Evan's family, current teacher, two school staff members, and the lawyer who helped the family obtain guardianship. The student was selected from a school specifically for students with more significant disabilities. The researchers chose to use a qualitative methodology and focused solely on one student and those involved in his guardianship process. The researchers used interviews, archival records, and observations to collect and analyze data. The participants were each asked close-ended questions and open-ended questions to gain understanding of general opinions and attitudes, beliefs, and sociological frameworks. The researchers used archival data to review court documents and handouts given by the school, and they observed Evan and his interactions with his family.

The researchers found that all participants in the study believed that due to Evan being in a “special school” his need for full guardianship was already decided. They also believed that they were recommending and choosing full guardianship for Evan’s protection, so he could not be taken advantage of. All participants had a lack of knowledge concerning guardianship and its alternatives. Lastly, the process of planning for guardianship was separate from the transition planning process for Evan.

Based on these findings, the researchers offered six recommendations: (a) the guardianship process should be based on assessments of the individual’s strengths, needs, preferences, and interests along with transition planning; (b) the school needed to realize students were emerging young adults to prepare them for variety of adult roles; (c) the school needed to help students develop and practice self-determination skills to prepare for adulthood; (d) the transfer of rights at age of majority should not have been seen as threat or warning, but a key point in the transition process; (e) the staff needed to be aware of alternatives to guardianship and all of the options therein to prepare students for adulthood; and (f) the guardianship and the transition process must go hand-in-hand and be discussed simultaneously. This study, and the one previously discussed, took place in 2008 and 2007 respectively. Both only examined guardianship in one state. Jameson et al. (2015) built on this information and furthered the research by conducting a study which included participants from 48 states, the District of Columbia, and several participants who lived outside of the United States. They used the survey results to gain a more recent and expansive capture of guardianship with regards to individuals with disabilities.

Specifically, Jameson et al. (2015) conducted a study to investigate guardianship and people with disabilities on a national level. The researchers framed their study around four research questions:

1. What is the prevalence of guardianship among people with disabilities?
2. What information was presented to respondents on the range of adult support options for people with disabilities?

3. What influence did the disability label have related to what guardianship alternatives were discussed?
4. Did educational placement have any impact on guardianship recommendations?

The researchers recruited participants for the survey through two organizations, The Association for the Severely Handicapped (TASH) Human Rights Committee and the Alliance to Prevent Restraint, Aversive Interventions, and Seclusion (APRAIS), which encompassed 31 organizations. The participants were notified about the survey through email, a notice on one of the organization's websites, or received information from someone else aware of the survey. In total, researchers had 1,225 respondents complete the entire survey. The respondents included individuals with a disability who were at least 18 years of age and parents of an individual with a disability across 48 states, the District of Columbia, and some outside of the United States. The data collected by the researchers were all descriptive and were analyzed and coded. The authors tested for intercoder agreement (ICA) by having two of the authors code 32% of the responses, and then created a common coding system. Their rate of ICA was 92%. The survey included 13 questions to answer the four research questions listed above.

The results of the survey showed that the majority of individuals with disabilities had full guardianship recommended to them, but 60% received no education or training related to guardianship. The data indicated that only 12 out of 305 responses reported receiving any information or education from school personnel. It also reported that full guardianship was most often discussed, and supported decision-making least often discussed. Finally, the data reported the disability category or level of inclusion did not matter, i.e., the same guardianship options were discussed. Based on the survey results and data analyzed, the researchers recommended that professionals who worked with individuals with disabilities approaching the age of majority needed to be trained on the full range of options in regard to guardianship. They also recommended the need to develop supported decision-making standards that can be universally adopted, and the need to develop better resources to promote independence,

autonomy, and self-determination. This study recommended that further research needed to be conducted on supported decision-making and a full range of guardianship options. Building on the research of Jameson et al. (2015), MacLeod (2017) focused on one person who was successful in using alternatives to guardianship, and especially supported decision-making, to live a self-determined life.

MacLeod (2017) investigated four topics related to guardianship: (a) the beliefs of individuals involved in determining alternatives to guardianship; (b) the attitudes and skills needed to develop transition plans that address alternatives to guardianship; (c) the skills to be taught to develop self-determination; and (d) the best practices needed to maximize self-determination skills and implement alternatives to guardianship. The researcher conducted her study by using a case-study, qualitative approach. As stated above, she focused the study around one individual who had experienced success with alternatives to guardianship, and the attitudes and skills of the team that helped plan for and implement a plan for success. The main participant was a young adult named Brian with intellectual disabilities. Brian was chosen because of his success with supported decision-making and because he had transitioned to adulthood without a guardian. MacLeod also included Brian's parents, teacher, and friend who were crucial in helping Brian navigate to adulthood successfully using supported-decision making rather than full-guardianship.

The research was conducted over 6 months using in-depth interviews and document analysis. The interview questions focused on general background information, knowledge of guardianship and its alternatives, and specifics related to Brian's transition. The document analysis was mainly of archival IEP documents, including transition plans, and the minutes of nine Circle of Support meetings. Circle of Support is a supported-decision making process where individuals important in Brian's life met together to listen to Brian and support him in the decisions he was making (Blumenthal & Campbell, 2012). All interviews and data were transcribed and analyzed for ideas related to the research questions of the study.

The findings of this study included the attitude that all participants presume competency. This is important because to receive guardianship one must be proved incompetent. Brian's team had the belief and attitude that Brian was competent and built from this belief to plan for alternatives to guardianship. Brian's team also purposefully built a community of support. This community allowed Brian to successfully use supported-decision making by having people around him that cared for him and intervened when necessary. Brian and his team also realized that he would need supports in order to be independent and planned for those supports. Lastly, Brian's teacher realized that she was not the expert on every topic and used inter-agency collaboration to make sure Brian had the support and expertise he needed to plan successfully for his life.

From these findings, MacLeod (2017) made five recommendations for schools and families in regard to guardianship and its alternatives for students with intellectual disabilities. First, presume that students should be included in a general education classroom. Second, establish person-centered planning for individuals with disabilities. This should be set up based on ongoing assessments to determine strengths, needs, preferences, and interests. Person-centered planning involves placing the person first and central in planning for their future. Third, create peer and community connections. These connections allowed Brian to move away from his parents and still be successful. Fourth, use all available resources including local agencies, professionals, and networks to connect with families and bring them to the school whenever possible. And lastly, make sure transition planning is individualized and planned for based on student's strengths, needs, weakness, and preferences. This will allow the team to plan for successful supports for adulthood, rather than falling back on full-guardianship.

### **Summary**

As shown in the literature review above, the research related to guardianship and alternatives to guardianship primarily focuses on underlying beliefs of guardianship and lack of knowledge of

alternatives to guardianship. The research states that it is important for educators to understand and know alternatives to guardianship and use this knowledge to plan for alternatives to guardianship during the transition planning process. However, there has been no research on the training of educators on guardianship and its alternatives, and how this training would affect teaching practices in both instructing parents on alternatives to guardianship and planning for such during the transition process. The next research in this area should examine the relation between professional development aimed at guardianship and its alternatives, and educators' beliefs and attitudes concerning guardianship and their ability to use this knowledge to plan for alternatives to guardianship for their students.

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# Personnel Training

Personnel Training Report

Alternatives to Guardianship

October 26, 2018

Instructor: Ali Gunn

## **Participants**

The participants of this training were three junior high teachers who taught special education to individuals with significant disabilities. These three teachers were chosen because they were teaching students who were beginning the transition process and had sought out information pertaining to guardianship. Each of the three teachers had different backgrounds in teaching special education.

The first, Jill, is a woman in her forties. She has been teaching for 2 years. She is currently in an alternative-to-licensure program and has almost graduated. She began working as a substitute in the special education program, then worked for one year as a paraprofessional before being hired as a teacher and beginning her licensure program. The second, Cathy, a woman in her sixties, has also been teaching for 2 years. Before she became a teacher, she was a paraprofessional in a severe/profound unit for 20 years. She then went to school for her degree in special education through a traditional program. The last, Erica, is a woman in her forties. This is her first-year teaching and she is currently in an alternative-to-licensure program. Before this year, she was a paraprofessional in an adult transition program. The three participants attended one session of training and received no credit or credentials.

## **Need for Training**

The three participants were each new teachers (having taught less than 3 years) and had received some training on writing transition plans and conducting an individualized transition plan (ITP) meeting. However, each of the teachers expressed interest in learning more about guardianship. Previously they had only been taught the need to make parents aware of the age of majority, as written in the ITP. They were uncomfortable about what else to say to parents concerning guardianship. All

three felt their knowledge was lacking. I had recently completed a literature review about guardianship and its alternatives, so these three teachers approached me to gain more understanding. I received permission from my principal, and from theirs, to hold a training session about alternatives to guardianship. The training was designed to increase the participants' knowledge concerning guardianship, how parents become a guardian, and the ramifications of full guardianship. It also covered alternatives to guardianship, how to use transition assessments to plan for alternatives to guardianship, and how guardianship and self-determination relate.

### Training Topic and Content of Training Session

The title of the training, and topic covered, was Alternatives to Guardianship. There were three goals for the training: (a) understand what guardianship is, how to obtain it, and the ramifications associated with obtaining guardianship; (b) identify several alternatives to guardianship; and (c) recognize how to plan for alternatives to guardianship during the transition planning process. I began by having the participants think about the ideals of the IDEA which included high expectations, self-determination, and autonomy. Teachers were encouraged to think about (a) their goals for their students, (b) if these goals included high expectations, and (c) if they were teaching self-determination skills. Teachers were introduced to full-guardianship, it's definition, and how parents gained guardianship. The training then discussed why many parents, and the majority of teachers, recommended full-

## Alternatives to Guardianship

Alternatives to guardianship are supports and accommodations that enable an individual with disabilities to lead an independent, self-determined life.

|  |  |
|--|--|
| <p><b><u>Financial:</u></b></p> <ul style="list-style-type: none"> <li>Bill payer programs</li> <li>Representative Payee (SSA)</li> <li>Dual Signature Accounts</li> <li>Joint bank account</li> <li>Direct Deposit Account</li> <li>Power of Attorney (financial)</li> <li>Trusts</li> <li>Prepaid credit/debit cards</li> <li>Venmo card</li> <li>Notifications to 3<sup>rd</sup> party if bills are late</li> </ul> | <p><b><u>Life Skills:</u></b></p> <ul style="list-style-type: none"> <li>In-home care services</li> <li>Free/reduced price meals/food delivery</li> <li>Daily call services with community agency</li> <li>Laundry services</li> <li>Cleaning services</li> <li>Uber/Lift</li> <li>Community transportation services</li> </ul>  |
| <p><b><u>Health/Medical:</u></b></p> <ul style="list-style-type: none"> <li>Power of attorney for medical/health care</li> <li>In-home community services</li> <li>Complete appropriate medical release forms to indicate who can obtain information</li> <li>Establish a living will</li> <li>Establish a healthcare directive</li> </ul>   | <p><b><u>Supported Decision-Making:</u></b></p> <ul style="list-style-type: none"> <li>Use trusted friends, families, or professionals when making decisions to help understand the decision and different consequences of the decision to be made</li> <li>Does not require any legal documents</li> <li>Individual chooses who they want to include in this process</li> </ul> |

guardianship, and the negative ramifications associated with guardianship. Participants were asked to participate in a “Think, Pair, Share” activity to discuss something they learned about guardianship and if their opinions or beliefs concerning guardianship had changed. After this introduction to guardianship, the training moved on to discuss alternatives to guardianship.

In the section about alternatives to guardianship, participants were first introduced to a definition explaining alternatives to guardianship. Then, several alternatives were introduced and discussed. The alternatives discussed were financial, health/medical, and living skills. Finally, the concept of supported decision making was taught and discussed as an alternative. Participants were then encouraged to do another “Think, Pair, Share” activity to discuss some alternatives to guardianship that would be useful to their students and determine if they felt comfortable sharing these ideas with parents.

Finally, participants were trained on how to use transition assessments to determine what supports the student would need to be able to live a successful and independent life when they turn 18 years old. They were instructed that this should take place during the transition planning process and discussed during the ITP meeting. In conclusion, the participants discussed how their previous knowledge and opinions of guardianship had changed and how this increased knowledge could benefit their students.

### **Measurement of Effects of Training**

In order to determine the effectiveness of the training, I had each participant fill out a pre and post-survey. The surveys were the same with the addition of two questions on the post-survey. The surveys covered the following 14 questions:

1. What is the first thing you think of when you think of guardianship?
2. How does someone who is 18 years of age obtain a guardian?

3. How comfortable do you feel talking about guardianship with parents? (5 being very comfortable, 1 being not comfortable at all).
4. Is guardianship something you, as a teacher, need to help parents plan for?
5. Do you know any alternatives to full-guardianship for people with disabilities?
6. If you answered yes to questions 5, please list all alternatives that you know.
7. How comfortable do you feel discussing options for alternatives to guardianship with parents? (5 being very comfortable, 1 being not comfortable at all).
8. How comfortable do you feel planning for alternatives to guardianship to meet the needs of your students? (5 being very comfortable, 1 being not comfortable at all).
9. How do transition assessments and guardianship relate?
10. What is self-determination?
11. Do you encourage and teach self-determination in your classroom?
12. If you said yes, or maybe, on question 10 please write a few ways how you do this.
13. Post-Training: Did the training affect your attitude or beliefs about guardianship? If so, how?
14. Post-Training: Did the training change how you will approach guardianship with parents in the future? If so, how?

Each of the three participants took the pre-survey before the training began. Each participant marked a 1 or 2 when stating how comfortable they felt talking about guardianship, alternatives to guardianship, and planning for alternatives to guardianship in the pre-survey. Each also knew guardianship happened when a student turned 18 years of age. Two of the three knew that parents needed to obtain a lawyer in order to apply for guardianship. However, one believed that if the parents did not apply for guardianship then the state would appoint one. All three teachers reported they knew

of zero alternatives to guardianship. They also reported they felt very unsure if they were teaching self-determination skills.

On the post-survey, each participant indicated an increased comfort level in their ability to talk about guardianship, and alternatives to guardianship with parents. They also indicated an increased comfort level in planning for alternatives to guardianship based on transition assessments. The numbers they reported rose from a 1-2 to a 4-5 on the scale. Each participant also reported knowledge of alternatives to guardianship and listed many alternatives that had been discussed. All participants stated that the training had a positive effect on their attitudes and beliefs about guardianship and how they will approach guardianship with parents. One participant stated, "I was very happy to know there are so many more options to help to maintain freedom of choice," and continued by saying, "I will make sure my parents have all the information I can give them, so they can research the options and make an educated decision." Another reported: "I am very happy to understand that there are alternatives to guardianship, that full guardianship should not be the automatic default for the students in my classroom (functional skills). After all, isn't that what we are teaching--independence to the fullest extent possible?" All three stated that they will use the knowledge they gained from the training to discuss the many options of guardianship, and its alternatives, with the parents of the students they are teaching.

### **Summary**

In this training on alternatives to guardianship, I was able to instruct three new teachers that work in transition on guardianship and what full-guardianship entails. I was able to help them identify many alternatives to guardianship that are less restrictive and more appropriate for many of their students and help them know how to plan for these alternatives. I felt that based on the surveys, the information was well received and understood as intended. I had hoped to instruct these three teachers

on alternatives to guardianship so that they could begin instructing the parents they work with, and in turn help shape the future of their students. In the future, I would provide more options for participants to apply knowledge to specific students, helping them formulate ideas for these students. I would also recommend bringing the same group back together to collaborate on what has worked and hasn't worked in helping parents plan for alternatives to guardianship. I recommend providing this training to high school teachers so that parents experience a continuity from junior high school to high school so they can continue to develop an appropriate plan for their child.

# Transition Assessment

Transition Assessment Report

“Orion”

Informal Transition Interview

October 9, 2018

Administered by Ali Gunn

CONFIDENTIAL INFORMATION. THIS REPORT SHOULD BE MADE AVAILABLE TO  
AUTHORIZED PERSONS ONLY.

### **Description of the Assessment**

The assessment that I administered was an informal transition interview and questionnaire. I administered the interview to the student's parent and the student. I chose to omit questions intended for parents only when interviewing the student. The parent, Jane, recorded her answers and I verbally interviewed the student, Orion, and recorded his answers. The purpose of this assessment was to collect information for the first individual transition plan (ITP). Orion is in junior high, and this is the first transition interview/assessment he and his parents have encountered. The interview questions were adapted from *Assess for Success: Handbook on Transition Assessments* by Sitlington, et al. (Year). The assessment questions provide information on both the student's and parent's goals for employment, education, and independent living post high school. It also provides information on the student's hobbies, interests, strengths, and weaknesses. The information gathered was used to create the first transition plan for the student, using student input. The interview results provided insight into both parents' and student's hope for the future and enables the transition goals to be created.

### **Administration of the Assessment**

The interview/questionnaire was administered in two parts. First, I called Jane (Orion's mom) and discussed with her what a transition plan is, why we were beginning the transition planning process, and the types of questions that would be sent home. I also informed her I would be asking Orion the same questions (while omitting ones intended solely for the parent). I asked her to discuss the questions with her husband so both of their input was included in the answering of the questions. The questions were sent home via a private and confidential Microsoft Forms questionnaire. The form was returned 8 days after it was sent home.

The second part of the assessment was administered verbally to Orion. I used the same questionnaire and recorded his responses on the Microsoft Forms questionnaire. This portion of the assessment took place in the student's classroom in a one-on-one setting. The interview took approximately ten minutes with the student, and approximately five to complete the form.

## **Results**

The results were received in two parts – the answers recorded by Jane, and the answers given by Orion. First, the results of the questionnaire answered by Jane were analyzed. In the area of employment Jane indicated that Orion knows about most jobs and has dreams of owning his own landscaping business. She indicated that he talks about having a job at least three times a week. She also said that he prefers working with others and working outside. In the area of post-school education, Jane indicated that she would like Orion to participate in community classes, sports, and classes related to his hobbies. She also indicated she would possibly like him to learn to use public transportation to access the community. In the area of independent living, Jane stated that she would like Orion to continue to live at home, but that he has shown some interest in a group home. She would like him to learn as many independent living skills as possible. Jane also indicated strengths, preferences, and weaknesses for Orion. She stated that he has a strength in knowing what he wants, learning facts, being caring and funny. She stated he enjoys swimming, playing in the hose, going on fun outings, going to the movies, using his iPad, going to grandma's house, mowing the lawn, using his leaf blower, and hanging out with his cousins and friends. She also stated he is interested in leaf blowers, vintage cars, science, and history. Jane said that Orion's behavior, specifically talking at inappropriate times and about inappropriate things, and sleeping all of the time are Orion's biggest weaknesses.

The answers to the interview by Orion are similar to his mom's in some respects and differ in others. In the area of employment, Orion indicated several specific jobs that he knows about including, police officer, firefighter, doctor, nurse, and fast food workers. When asked about his dream job, Orion

said he wanted to make movies and do landscaping. He also indicated he prefers working inside and with others. When asked about what he would like to do for classes after high school Orion stated he wanted to participate in sports such as soccer, basketball, and football, and to also take science classes. In the area of independent living Orion said he wanted to live at home or maybe an apartment. He indicated specific skills he wants to learn. These are: tying his shoes, cooking, laundry, and money. Orion also indicated what he views as his strengths, interests, preferences, and weaknesses. Orion's strengths were reported as science, math, history, and sports. His interests and hobbies include playing football and video games, watching YouTube, using leaf blowers, mowing the lawn, looking at vintage



cars, and playing sports. He views his strengths as science, math, history, and sports and his weaknesses as reading, writing, and talking too much.

Orion was excited to discuss his dreams and what he would like his future to look like. He was confident in his answers and had an answer readily available to all

questions. Orion had opinions on his preferences and those were included in the interview questions and answers he gave. In talking with Jane, and reading her answers, she was more hesitant and unsure about Orion's future and planning for his future. I analyzed both sets of responses to the questionnaire in creating a transition plan for Orion but gave preferences to his ideas and answers. In looking at both responses, however, it appears that both mom and Orion have similar hopes and plans for his future. Both want him to be employed in something he enjoys, continue his education by attending community classes and participating in recreational sports, and both have similar ideas about where he wants to live post-high school. This analysis was clear in the responses given by both parties.

**Present Level Statement**

According to an interview given to mom and Orion (separately), both mom and Orion agreed that he knew of many jobs and was excited to be able to have a job. Mom relayed that Orion was interested in owning his own landscaping business, and Orion agreed and also added that he wanted to make movies. When asked about future living mom indicated that Orion wanted to live at home and has shown some interest in a group home. Orion said he would like to live at home or in an apartment. Both mom and Orion would like him to learn many independent living skills including shoe tying, laundry, cooking, and money skills. Orion would love to be involved in the community and take sports classes (soccer, football, basketball) and also science classes. Mom agreed that she would like him to participate in as many community activities as possible. Currently, Orion accesses the community with his family driving or with the school on the school bus. Orion is interested in learning to ride the bus and use public transportation. Orion enjoys playing football and video games. He also has interests in vintage cars, leaf blowers, mowing lawns, and sports. Mom also said he likes to swim, go on outings with family, mow the lawn, and use the leaf blower. She indicated similar interests as Orion. Mom indicated Orion's strengths included knowing what he wants, learning facts, being caring and funny. Orion indicated his strengths are science, math, history, and sports. Both mom and Orion feel he has a weakness in talking too much and mom included talking about inappropriate things. Mom also indicated that he sleeps a lot. Orion indicated that he has a weakness with reading and writing. Orion needs to decrease his behavior of talking at inappropriate times and about inappropriate things in order to gain and keep employment. He needs to continue to increase his reading level and comprehension skills in order to participate in community classes. Orion also needs to identify amounts of items and be able to pay for those items in order to increase his independent living skills.

**Measurable Post-Secondary Goals**

As part of the transition plan, three measurable post-secondary goals (MPG) were created which address the areas of employment, education, and independent living skills. These goals were derived based on the results of the transition assessment.

1. Employment: After leaving school Orion will work in a position providing landscaping services, as measured by one paycheck.
2. Education: After leaving school Orion will participate in at least one community class or activity that meets his interests as measured by a class attendance sheet.
3. Independent Living Skills: After leaving school Orion will use a budget to manage his money independently as measured by 1 month of a recorded budget.

The three goals indicated relate to the results of the transition assessment by addressing the desire of Orion and his mom for him to have a job related to landscaping, participate in community classes, and to increase his independent living skills. One of the independent living skills both mom and Orion indicated was money skills. As this skill also relates to having a job, the team felt this was a good place to start.

### **Annual Goals**

One of the annual goals written to relate to both the assessment results and the MPG of independent living skills is as follows: "Given a monetary amount up to \$50.00, Orion will use the dollar more strategy to pay for items using \$1, \$5, \$10, and \$20 bills with at least 80% accuracy over 3 consecutive trials on 3 different days." This goal was written to address the need for Orion to learn money skills and to meet the MPG of independent living skills which indicates that Orion will use a budget to manage his money. In order to use a budget, Orion first has to be able to use money to pay for items he needs and will be included on his budget. Orion needs to know how to count money and how much equals the amount needed. This goal is an emergent step to using a budget to manage his

money and meets the needs of one of the independent living skills indicated by both mom and Orion on the transition assessment.

A second annual goal written to help Orion meet his post-secondary goals was a behavioral goal. That goal stated, "Orion will increase the amount of time he is quiet when the teacher or peer is talking as measured by staying quiet 8 out of 10 opportunities over 3 data collection sessions on 3 different days." This goal was created to address the behavioral concerns that might impede Orion from gaining and keeping employment, and also participate in community programs.

### **Summary**

Both Orion and his mom, Jane, completed a transition assessment interview/questionnaire. The assessment gathered information about employment goals, education goals, independent living skills, as well as strengths, preferences, and needs. Orion had a crucial part in participating in his transition plan by answering all of the interview questions asked of him with his own ideas, opinions, and preferences. The results of the assessment were used to create the measurable post-secondary goals in Orion's transition plan. In the assessment, mom and Orion both stated that he would like to work in landscaping. The employment post-secondary goal states that Orion will have a job in landscaping. For post-secondary education, both Orion and his mom stated that he would like to participate in community classes that meet his current interests which is what is stated in his post-secondary education goal. Mom and Orion both related interest in him learning many independent living skills. One of the skills that both mentioned was money skills. As this skill related not only to independent living, but also to employment, it was chosen for his independent living skills goal. All three goals were derived from the results of the transition assessment and created to meet Orion's individual needs, goals, and preferences.

# Collaboration Report

Collaboration Report

Ali Gunn

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## Collaboration Activity and Rationale

For this collaboration activity I worked with a science general education teacher to create a measurable annual goal (MAG) for one of my students. The student, "Owen," had a diagnosis of Autism and was also diagnosed with cognitive impairment.

Owen was a male, 8<sup>th</sup> grade student, who attended 50% of his school day in the self-contained special education unit and 50% of his school day in the general education setting with his peers. Owen had previously taken classes such as art, physical education, and choir. Through these classes he had shown the ability to participate appropriately and control his behavior amongst his peers. He had a strength and strong preference in science. As such, the general education teacher and I both felt that he would benefit from



attending a general education science class. Because this is not my area of expertise, I enlisted the help of his future science teacher to write his MAG for science. This allowed him to attend the general education science class while continuing to have a MAG on his IEP in the area of science.

## Participants' Roles and Responsibilities

There were two participants in this collaboration effort. The first was myself. I was the special education teacher in a severe/profound unit and the case manager for Owen. My responsibilities included (a) identifying Owen's strengths that allowed him to attend the general education science class; (b) identifying Owen's weaknesses that would hinder his success in the general education classroom; (c) identifying at what level Owen would be able to independently participate in the general

education class to work toward his MAG; and (d) writing the actual goal in a way that was measurable with the needed objectives.

The second participant was the general education science teacher, Jenn who taught both a regular science class and a science exploration class. Jenn's responsibilities included (a) identifying which class Owen should attend; (b) identifying what the standards-based requirements were in her classroom for her typically developing students; (c) Identifying expectations for Owen in regards to the standards-based requirements; and (d) helping write the content portion of the MAG based on the science standards.

### **Actions Taken**

Jenn first observed Owen in both my classroom, and one of his general education classes to determine his capabilities and which class would be the best fit for him. She also discussed with me his strengths and weaknesses and read his current IEP. After these steps, Jenn recommended that Owen take her science exploration class, as opposed to the regular science class because it was more hands on and experiment based. Jenn then discussed with me the competency standard for the students in her classroom, and we decided together how to modify this to meet Owen's needs and abilities. Jenn and I discussed what Owen would be expected to do in her classroom and wrote a MAG together based on this information. The goal was: "When given a problem to solve, Owen will independently follow the science practices by following the given steps/directions, work within the given requirements to solve the problem, and describe his solution with at least 80% accuracy for each part over 3 consecutive trials on 3 different days". This goal was directly related to the district-wide science standards but was simplified so that it was appropriate for Owen.

### **Outcomes**

The overall outcome of this collaboration was that Owen was able to attend a general education science class with his peers. His science teacher and I created a MAG together which allowed Owen to continue to have a science goal on his IEP while also working toward that goal by attending a general education science class. This allowed for the most appropriate least restrictive environment for Owen and met his individual needs. Owen received a pass in his science class last term and has made significant progress on his MAG.