

# Individualized Career Planning for students with significant support needs utilizing the Discovery and Vocational Profile process, cross-agency collaborative funding and Social Security Work Incentives

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**Abstract.** Nationally, less than 8% of students with a disability exit school with a job, enrollment in post-secondary education, involvement in community recreation and leisure activities, or independent living arrangements [8]. Those students most likely to leave school without skills and supports necessary to work in the community are those with the most significant disabilities. The Individualized Career Planning Model provides a transition planning template for these students. The process includes conducting Discovery, writing a Vocational Profile, facilitating a Customized Employment Planning Meeting, and creating a Representational Portfolio. Using the model, students obtain Customized Employment/self-employment, are linked to collaboratively funded supports, and are assisted to access Social Security work incentives such as Plans for Achieving Self Support.

**Keywords:** Individualized Career Planning Model, transition, youth, significant disabilities, customized employment, Discovery, Vocational Profile, Customized Employment Planning Meeting, Representational Portfolio, Plan for Achieving Self Support (PASS)

## 1. Introduction

The Individualized Career Planning Model was developed in response to growing concern about poor transition-to-employment outcomes for students with significant disabilities. Nationally, less than 8% of students with a disability exit school with a job, are enrolled in a post-secondary education institution, are in-

involved in community recreation and leisure activities, or are living in an independent situation [8]. Those students most likely to leave school without skills and supports necessary to work in the community are those with the most significant disabilities. Poor post-school outcomes have been linked to the lack of vocational preparation, transition planning, and linkages to existing adult services and supports prior to graduation. The Individualized Career Planning Model is specifically designed to overcome these programmatic and funding challenges and barriers at the same time that it promotes

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a customized approach to employment.

The Model has been developing since 2001 in Montana with the support of two US Department of Education grants. These funds supported two distinct but integral implementation projects: WISER (Work Incentives and Alternative Resource Development for Student Employment #H324M000089), and Linkages to Employment (#H324M020140). The Model was conceptualized, implemented, and field-tested in nine Montana schools, each with very different challenges, resources, and populations.

This article will introduce the Model and discuss its primary components. Wherever possible, case studies of participating students have been included to illustrate the different ways the Model or its components can be used and integrated into existing services and programs. This is followed by a brief discussion of some of the unique challenges to implementing this Model in rural Montana schools. We close with a candid assessment of the Model's effectiveness and range of applicability, and plans for future development. Generally, the case studies indicate that the Model is effective in gaining employment for students with significant disabilities, that Social Security Work Incentives are an underutilized and highly effective funding option to enhance transition efforts and support employment upon graduation for students who are eligible for this incentive, and that with early creation of linkages, agencies, schools and the student can work collaboratively to fund supports to achieve better quality employment outcomes for less overall cost. This latter feature is particularly important in light of shrinking state budgets and growing waiting lists for adult employment services. The bottom line is that students who have access to real jobs while they are in school and plans in place to meet their ongoing needs upon graduation, not only have a better chance of being employed after graduation but also make fewer demands for services on adult agencies.

## **2. The Model**

The Individualized Career Planning Model is designed to enable students with disabilities – particularly those with a significant impact of disability – to transition from school to work and from student services to adult services without incurring significant loss in employment opportunities, funding, services, or supports. The Model uses Social Security Work Incentives, natural supports, and linkages between Workforce Investment, Vocational Rehabilitation, and other

adult agencies to enhance transition planning and career development for students. The ultimate goal is paid, community-based employment or self-employment for each student upon graduation, regardless of the severity of his or her disability.

The Model offers schools a template for individualizing vocational curriculum and preparation of students with disabilities. One significant advantage of the Model is that its innovative features and focus on the individual can be implemented – either in part or in whole – within existing school services and frameworks.

The innovative features of the Individualized Career Planning Model include:

1. Customized employment opportunities [9,15], work experiences, and transition planning for each student, driven by the student's interests, support needs, strengths, and contributions rather than by generic job descriptions and available openings. Customization implies flexibility, enabling support staff to modify parameters and desired outcomes as the student's interests and skills evolve through additional work experience;
2. Entrepreneurial options or self-employment as post-school outcomes or career-experience options for students, in addition to traditional wage employment;
3. Utilization of Social Security Work Incentives with students to increase consumer choice and family control over services; and,
4. Linkages between agencies such as Vocational Rehabilitation, Workforce Investment, employment vendors and the schools to promote collaborative funding of employment and transition activities.

The Model is designed for students aged 14 (or younger if appropriate) through 21, or graduation from high school. It promotes individualized vocational planning within recommended benchmarks and timelines for vocational activities. To ensure individualization, vocational activities – whether school-based jobs for students under the age of 16 or community-based jobs for students 16 and older – are guided by the student's support needs, strengths, and contributions. Thus, the first step in the Individualized Career Planning process is to answer the question, "Who is this student?" What are her interests, preferences and passions? What environments, supports, and teaching strategies enable her to be at her best? What skills and abilities does she possess? What job tasks does

she currently perform? The process of gathering this information is called Discovery [2].

Discovery culminates in the writing of a qualitatively rich and detailed Vocational Profile – a written picture of the student [3]. The information from the Profile is then summarized and compartmentalized in a person-centered, Customized Employment Planning Meeting. During this meeting several things happen: a plan to develop a customized job is formulated; the actual terms of employment – the Ideal Conditions – are identified and agreed upon and then translated into language understandable to future employers; and information describing the student’s skills and abilities – her Contributions – is captured [2].

Following the meeting, the information is translated into a picture and narrative format called a Representational Portfolio. The job developer uses this Portfolio to represent the job seeker to potential employers, or in those instances where self-employment is chosen, to develop self-employment alternatives with appropriate supports [3]. Throughout this process, the Individualized Career Planning Model promotes creative funding arrangements, either by supporting students to access Social Security Administration (SSA) Work Incentives or utilizing funding in more collaborative ways, such as blending funds from schools, SSA, Workforce, and Vocational Rehabilitation.

Entrepreneurial and self-employment alternatives, collaborative funding agreements, and non-traditional agency linkages are especially important in places like Montana where resources and opportunities are significantly limited by demographics and geography. Indeed, a primary impetus for developing this Model arose from a need to get beyond or around the constraints and limitations imposed upon students with disabilities, their families, service providers, and schools by shrinking funds, lack of options for students with significant disabilities, and the inherent economic and geographic challenges in a rural state.

### 3. The case for customization

The traditional labor market approach (matching people to existing job openings) does not typically result in jobs for people with more significant disabilities. When required to compete against applicants without disabilities for job openings, or when one’s skills and abilities are compared against an existing job description, people with a more significant impact of disability simply do not measure up [2]. However, if an individu-

alized approach is used to represent a person’s contributions to employers needing those contributions, skills, abilities, and personal characteristics, a satisfying employment experience becomes much more likely for both employee and employer.

For this reason, the ultimate goal of the Individualized Career Planning Model is to tailor employment experiences and paid jobs to fit the skills, interests, strengths, and abilities of students, while at the same time meeting the needs and expectations of the employer. This includes unpaid school-based experiences for younger students, or paid, community-based experiences for older students. “Customized employment” essentially means “individualizing the employment relationship between employees and employers in ways that meet the needs of both” [2, p. 17].

Why customize? For students with a significant impact of disability, customizing an experience or employment setting enhances their opportunities for participation. By tailoring a position – removing or avoiding tasks a person cannot do well or at all, creating supports and environments wherein we know a student is at his or her best – we can maximize a student’s independent and competent performance. This not only increases the student’s self-esteem, but also promotes her as a competent employee to coworkers and employers. If, on the other hand, we place a student in a job environment or ask the student to perform a task that does not match his ideal conditions, we set the student up to be perceived as less productive and competent, and more dependent upon specialized, external supports than is actually the case. Inevitably, employer and employee dissatisfaction or frustration ensues, or worse yet, the employee becomes labeled “unemployable.”

### 4. Discovery

In order for schools to customize work experiences or post-school employment, the first step is to get to know the student. The Individualized Career Planning Model uses the process of Discovery. This process answers the question, “Who is this student?” and the information gathered provides direction for all subsequent career development activities.

In Discovery, information is gathered about a student’s interests and strengths, the types of environments and activities in which a student is at his or her best, the types of supports that are most effective, and the present level of performance in actual life activities. This information is gathered through a series of interviews,

activities and observations. Information is collected from family members, friends, teachers, neighbors. . . anyone who knows the student well. The person facilitating the Discovery process spends time at the student's home and school, and in the community with the student, observing the student in familiar as well as unfamiliar activities.

## **5. The Vocational Profile**

The information gathered in Discovery is then recorded in a written format called the Vocational Profile. This information about the individual student guides the negotiation and creation of school and community-based jobs.

Vocational Profiles are an alternative to standardized vocational evaluations [3,11]. The advantage of the Vocational Profile for a student with a more significant disability is that it provides concrete direction toward employment and furnishes a detailed picture of the ideal employment conditions and settings. The Profile also provides information on and examples of supports, accommodations, or adaptations that a student currently uses to be successful within his or her school, home, or work environments.

The Profile differs from a traditional vocational evaluation in that it does not numerically measure skills or abilities, compare the individual student's performance against some standardized norm, or attempt to predict employment success or failure. Instead, the Profile qualitatively describes a student's performance, the activities and environments best suited to success, and the supports currently in use in familiar environments. Most importantly, perhaps, the Profile is not a tool for weeding out "unemployable" students; its sole purpose is to identify those situations in which a student can be most successful and to aid in the customization of an employment relationship that will foster that success. In other words, the ability to work in the community is presumed; the task for the job developer is to locate employment settings which match the person, and negotiate the appropriate supports and job tasks to make the work experience successful.

## **6. The Profile and the Individual Education Plan (IEP)**

The Individualized Career Planning Model timelines suggest beginning a Vocational Profile for students at

age 14 for the benefit of utilizing this information to guide transition planning, career exploration and vocational preparation. The Discovery process complements the IEP process in that strengths, preferences, and interests are identified and support needs and successful accommodations are described. The Discovery process also identifies skills that a student needs to master or enhance, which enables them to increase participation or independence in activities in their home, school or community. These skills form the foundation of the instructional plan and drive the goals and objectives outlined for instruction in the IEP.

The ultimate objective of the IEP is the desired post-school outcome (employment), and the instructional plan is tailored accordingly. Some schools have begun substituting the Vocational Profile for some of the assessments traditionally used to measure student capabilities because the Profile provides more meaningful information and a better indication of the skills a student needs to learn to achieve their desired post-school outcomes.

For students aged 16 and older (since students without disabilities are setting their sights on paid employment), the Profile guides the development of individualized, paid, community-based jobs or, in some instances, the development of a student-owned business. Additionally, the Vocational Profile would make an excellent "summary of student performance" document which could transition with the student from school to adult services.

## **7. Customized Employment Planning Meeting**

Once the Profile is complete an Employment Planning Meeting is held. The student and his or her family have the final vote in who is invited to this meeting. Participants generally consist of family members, school staff, friends, employers, Vocational Rehabilitation staff, the future job developer, and anyone who knows the student well. The meeting works best if the number of professionals is more or less equal to that of friends, family, and community members. The purpose of the meeting is to establish a road map for developing a specific job for the student which identifies: (a) the parameters needing negotiation to customize a successful job, (b) a list of Contributions the person can bring to an employer, (c) a list of Job Tasks that the employee can perform, and (d) a prospecting list of employers within the person's community who may meet the Ideal Conditions and be in need of the services identi-

fied in the individual's Job Tasks. In this meeting, the information gathered during Discovery and captured in the Profile is summarized into the following categories: Ideal Conditions, Preferences, Contributions, Job Tasks, and Potential Employers. It is essential that the person who will be developing the customized job attend the Employment Planning Meeting.

Ideal Conditions for employment include a description of any critical factors which must be present (or absent) for the student to be successful. Included might be necessary supports, environmental conditions, and teaching strategies. This section defines the parameters of the job for which the job developer will be negotiating on behalf of the individual student. Preferences are the areas of interest identified for or by the student. These may or may not be work-related but could potentially lead to the job developer to an employment site or an employment connection. Contributions are the skills, experiences, personal attributes, or credentials that a student brings to an employer. Job Tasks are those tasks that the student can perform, or based upon what was learned in Discovery, what the interviewer believes the student is capable of performing with training.

Using all of this information, meeting participants either identify Potential Employers in the community or identify training activities that can be created in the student's school, depending on the student's age. Employment activities of nondisabled peers serve as the reference point for students with disabilities. Job tasks, work or learning environments, as well as supports and on-the-job training are structured according to the information provided in the Profile which was summarized in the Planning meeting.

The Individualized Career Planning process complements the IEP process in that information gathered during Discovery helps support staff to form a picture of each student's present level of performance, strengths and interests, and provides a vision of the student's post-school outcomes. It also highlights areas or skills where instruction is needed and identifies transition goals which are functional for each individual student.

For students 16 and older, once the Profile is completed and the Ideal Conditions of employment are identified, a list of Potential Employers is compiled. Potential Employers are those employers within the community who match the Ideal Conditions of employment described for the individual and who may have a need for the skills or Contributions that the individual can provide. This list directs the job developer in her efforts on behalf of the job seeker.

## 8. The Representational Portfolio

The Representational Portfolio is one marketing tool job developers can use to represent job seekers to employers when making presentations on their behalf. The Portfolio translates the information gathered during Discovery, captured in the Profile, and summarized in the Employment Planning Meeting into a presentation format for an employer. It is a narrative and pictorial representation of the individual's contributions and capabilities, and is comprised of two components. The first half of the Portfolio introduces the concept of Customized Employment to the employer, thereby paving the way for the job developer to negotiate those terms of employment that best meet the individual's necessary or ideal conditions for success. The second half of the Portfolio uses narrative and pictures to introduce the job seeker and to share information about her potential contributions. Schools, agencies and families report that both the Vocational Profile and Representational Portfolio are useful tools for sharing information about students with adult agencies who may be serving the student upon graduation from high school.

Below is a very brief sketch of how information collected in Discovery leads to the identification of Contributions and Ideal Conditions. These, in turn, guide the job search and establish the parameters of employment.

Katie had participated in a few school and community-based work explorations prior to looking for a paid job. Based on these experiences and the information gathered during the Discovery, we learned that Katie's Contributions included:

1. The ability to memorize the layout of large stores, including where items in various departments are housed;
2. Meticulously returning items to their appropriate spots;
3. Recognizing when stock was out of place; and
4. Asking for help when she needed it.

Katie is a dedicated worker, her attendance is good and she is a reliable employee. She is also friendly and outgoing, and works well and collaboratively with many coworkers and customers. Some of the Job Tasks that she can perform for an employer include:

1. Returning items to the appropriate shelves;
2. Facing items on shelves;
3. Performing quality checks to ensure that displays in the store are neat and accurate;
4. Scanning merchandise for price checks or inventory; and

#### 5. Assisting customers in locating desired items.

Katie's Ideal Conditions include an environment that can accommodate her electric wheelchair. If she is to return or handle merchandise it must be light, small and easy to grasp. When interacting with coworkers, supervisors or customers, she needs time to respond using her Delta Talker, an augmentative communication device. It is best for her to have a structured routine of familiar job tasks that she feels confident she can physically perform; however, new tasks can be introduced to the routine. Katie does best when the supervisor takes time to help her figure out ways to perform pieces of tasks differently in instances where some physical limitation prevents her from performing the task in the typical way.

Wal-Mart, an employer in Katie's town, needed someone to stock merchandise that customers had returned to the store. They valued having an employee who returned items to the correct place rather than replacing the merchandise incorrectly in any convenient spot. A strong work ethic, positive attitude and good attendance were desired employee traits. Wal-Mart hired Katie after recognizing that she could make a valuable contribution to their workplace. Katie worked at Wal-Mart for over a year and then chose to resign from this position to pursue her next job.

### **9. Promoting self-determination and informed choice**

At age 16, few students – with or without disabilities – have much firsthand experience with employment. They often do not know what their preferences and interests are in a job, much less have a clear, singular vision of what they would like to do for a job after high school. Work exploration allows a student to investigate an area or job type in which he may have some interest. The experience enables the student to make more informed choices about environments, features of work, and job tasks in future employment decisions and it has the added benefit of providing the job developer with more information about an individual's skills, performance, and support needs within various environments.

The work exploration is not an attempt to "evaluate" an individual's "readiness" to work. The philosophy of the Model is that everyone is "ready" and has some contribution to make; it is simply a matter of discovering the individual's contributions and desires,

and matching those to an employer's needs. Building a model that incorporates flexibility as a fundamental feature provides students with disabilities the same latitude to explore possible career alternatives and to grow and change over time as that enjoyed by those without disabilities. As a student gains experience and skills, their preferences, the parameters which need to be negotiated on their behalf, and the job tasks they can perform will also evolve and change.

One word of caution in regard to work experiences is that the more significant the impact of disability on a student's performance, the more critical it is to customize and individualize their employment experiences. Customization allows the student to experience maximum independence and participation and leads to job performance that promotes a positive and competent image of the person to the community and future employers.

Matt's Profile identified characteristics of an ideal job which led to placement in a paid position at a local video and music store. But it also identified an interest in working around dogs and animals as another potential career goal. In addition to his paid job, Matt chose to volunteer at a local Humane Society to explore whether or not he would like to pursue some type of work with animals and possibly start his own dog boarding business. Matt was able to explore two very different types of work simultaneously. Each experience was customized for him. The experience was valuable not only because it provided Matt with information he could later use to make informed choices about what he wanted to do, but also because it enabled him to make connections with others in the community who might be helpful in his future job searches.

Before graduating from high school, Matt's teacher developed several part-time jobs for him which totaled 20 hours a week. He worked at the local video store on Friday nights; and at the courthouse, the school administration building, and the city library during the week. All of these jobs were customized and developed using the information provided in Matt's Profile.

### **10. Self-employment as a post-school outcome or career experience**

Data from a Rehabilitation Services Administration (RSA)-funded Choice Projects found that when given the option of self-employment or traditional wage employment, people with disabilities chose self-employment at the same rate as people without dis-

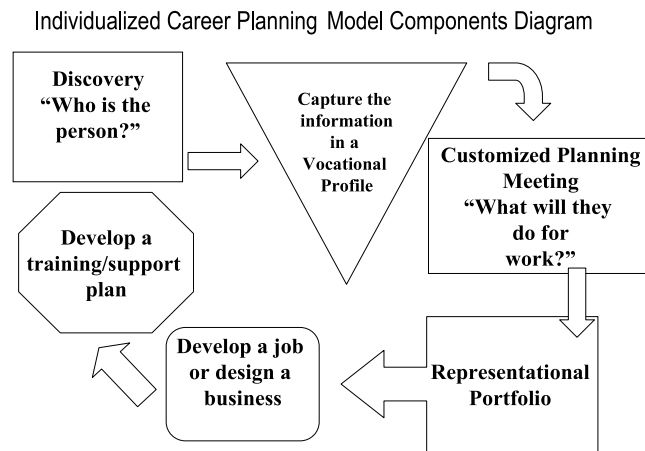


Fig. 1. Individualized career planning model components diagram.

abilities [1]. Self-employment is a growing trend, especially in more rural areas where limited job opportunities exist for everyone [6]. People choose to be self-employed for a variety of reasons, including a lack of existing employment opportunities, a desire to customize work schedules and tasks to fit lifestyles, or a passion for a product or service that cannot be realized in any other employment setting.

For students with a more significant impact of disability, the list of Ideal Conditions—those factors that must be present (or absent) in order for a student to be most successful—will likely be longer than that of someone with less impact of disability. This means that finding a suitable employment match in existing markets may be more difficult. In some cases, supported self-employment could be an alternative, but the inability to locate traditional employment should not be the only factor involved in this decision.

While the self-employed person has more control over the design of the work environment, definition of job tasks, use of time, and a host of other factors that can be tailored to best meet the needs of the worker rather than the demands of the product or employer, it is not for everyone. There are a multitude of additional factors which need to be considered prior to choosing this option, including: What supports will the person need for their business (such as marketing, sales, or bookkeeping)? Does the person or their family have experience or expertise in small business? If not, are there local resources that could provide assistance? How much will the person need to earn to support himself or herself and grow the business? While independent performance of these activities is not a prerequisite to becoming self-employed, these are supports that will

need to be negotiated on behalf of the individual or provided by a family member, friend, or employee to ensure that the business is successful.

Self-employment can serve as both work experience and as a post-school outcome. The strategies and principles intrinsic to supported employment also apply to a supported self-employment model [5]. And, as is the case for small business owners in the mainstream workforce, students or adults with disabilities need not master all components or perform all tasks of owning and running their own business for self-employment to be considered a feasible option. Partial participation with ongoing supports is by no means out of the ordinary.

Luke began his small business while he was still in high school. From his Discovery process his planning team knew that he liked to be on the go—driving around, visiting with familiar people. As part of his Transition preparation, he participated in school and community-based work experiences that involved making deliveries. Luke lived in a small rural community. When his job developer could not find a business that matched his ideal conditions of employment, as well as his preferences (making deliveries), his family urged the job developer to pursue self-employment. Luke started a delivery business which delivered lunches for local restaurants. He had a contract with one of the larger businesses in town to provide lunch to their employees twice weekly. As Luke's business grew the goal was to hire a partner who could also meet some of Luke's ongoing support needs. In the meantime, his family used funding from the State Developmental Disabilities Program to pay someone to drive his van, assist with deliveries, and support his participation in his business.

### **11. Social Security Work Incentives: Funding transition planning and ongoing supports**

Perhaps the single most innovative and important feature of the Individualized Career Planning Model is its use of Social Security Work Incentives to fund transition planning and career development activities for high school students. Work incentives such as the PASS (Plan for Achieving Self-Support) plan have been in existence since 1974. PASS plans can be used to fund a variety of services and supports (assessments, job coaching, job development, transportation, education, equipment, etc.) at different stages in the career development and transition planning process for people who are eligible for them. PASS plans can augment what schools and/or agencies provide for student employment; fund interim employment supports between graduation (and the subsequent loss of school services) and the onset of receiving adult agency services; or, purchase tools, equipment, or services needed for a student to begin his own business. Accessing these funds has an added advantage in that it enables students, families and support staff to leverage other funds and services that the individual may need [12].

### **12. The PASS Plan**

PASS plans are one of the Social Security Administration's work incentive programs. PASS plans allow a Supplemental Security Income (SSI) recipient to set aside resources or income, thereby decreasing the amount of the person's countable income and increasing their monthly SSI check. The money that is set aside can be used to fund many items, supports, or services needed to assist an eligible person in reaching a Vocational Goal [14]. Nationally, only four PASS plans exist for people under the age of 18, and only 80 PASS plans are in existence for people age 18–21 [14]. Only two tenths of one percent of those individuals eligible for SSA Work Incentives uses this resource [7]. Reasons for underutilization include: fear of losing benefits, lack of qualified personnel to write PASS plans, and lack of awareness that the resource exists [10].

To be eligible for a PASS plan, a student must meet medical eligibility requirements for SSI, which is income- and disability-based, AND have countable income or resources that reduce her SSI payment below the Federal Benefit Rate of \$623/month (2007 Federal Benefit Rate). As long as the individual is a student, wages do not reduce the SSI checks until the stu-

dent earns more than \$1,510/month, up to \$6,100/year (2007 rates; Student Earned Income Exclusion). However, once an individual graduates, wages reduce the monthly SSI check by fifty cents for every dollar earned over \$85 monthly. This reduction in SSI makes an individual eligible for a PASS plan, which allows the individual to shelter the amount by which the SSI checks are reduced in a PASS plan account. These funds can then be used to furnish the supports necessary for them to work.

Anne was 17 years old when her IEP team discovered she was eligible for a PASS plan. Her SSI check was being reduced by her monthly SSDAC (Social Security for Disabled Adult Children) checks, which she began receiving following the death of her father. She was able to shelter the amount of the SSDAC check (\$290/month) for a period of three years in a PASS which eventually totaled over \$9,000. Her PASS was originally intended to purchase transportation services, job development and job coaching while she was in school and to later bridge the potential gaps in support between school and post-school supports. Since the school and Vocational Rehabilitation funded her job development and coaching she amended her PASS, and with Social Security's approval, purchased a wheelchair accessible van.

PASS plans are a perfect tool for transition planning because they can be used to bridge the gap in services between school and post-school supports. They are flexible in what they fund—anything a person needs to obtain and maintain employment. And PASS plans promote consumer and family choice and control – the individual or their Representative Payee chooses what to purchase and from whom to purchase it and payment is made out of the individual's designated bank account as the individual authorizes. PASS plans can also be modified, with the PASS Cadre's permission, as circumstances and funding or service needs change. If a person's Vocational Goal changes they can also have more than one PASS plan.

Luke, the young man who began his own delivery business, and his brother combined their PASS plans to purchase a van for their business. Vocational Rehabilitation funds were used to adapt the van to make it accessible and fund some of the initial job coaching. While Luke was still in school, the school provided a paraprofessional as a job coach and driver. After Luke graduated, his family provided supports for his business.

The Individualized Career Planning Model encourages the use and development of PASS plans for eligi-

ble students. The Model recommends that as part of transition planning Social Security Benefits Analyses be completed to identify those students who might be eligible for Social Security Work Incentives such as PASS plans. In some cases, a student could become eligible for a PASS plan and SSI simultaneously by sheltering income or a resource in the PASS. Ideally a student's eligibility is reviewed annually at their IEP, or whenever there is a change which could impact her eligibility for SSA benefits (a parent retires, becomes disabled, or dies; the student's income changes; parents' income changes; family composition changes; the student turns 18 or is about to exit school).

Information about Social Security Work Incentives such as PASS plans is being disseminated to schools, families, Workforce agencies, Vocational Rehabilitation, and Developmental Disabilities case managers with the hopes that more students who are eligible for these work incentives will access them. Vocational Rehabilitation may fund the development of a PASS plan for students who are in their exit year of high school. Some Vocational Rehabilitation offices have committed to utilizing work incentives as a long-term signoff for students requesting extended employment services through Vocational Rehabilitation. Workforce agencies are exploring the option of offering PASS plans as a service for eligible Workforce consumers.

Access to funds such as those provided in a PASS plan give the family and person with disabilities more choices in designing transition plans and selecting career options. And in rural areas where employment opportunities and support services are scarce, creativity and choice are essential.

### **13. Forging linkages: Collaboration between agencies, schools, and individuals**

One of the overarching objectives of the Individualized Career Planning Model is to affect a nearly "seamless" transition from student life to post-school adult life so that the person does not lose—permanently or temporarily—skills and abilities, or employment and established supports acquired while in school. Connecting students and families with appropriate adult agencies, accessing and blending all available funds and striving to place students into permanent jobs prior to high school exit is needed. Fostering interagency collaborative arrangements that support these activities will build community capacity to support better outcomes for exiting students.

A major difficulty in planning for successful transitions from school to adult life for students with ongoing support needs is overcoming the differences in how schools and adult agencies provide services. School-sponsored special education services are entitlements; if a student has a disability, he or she receives the service. By contrast, adult agencies such as Vocational Rehabilitation and Developmental Disabilities Programs provide services based upon eligibility and availability; even when a person is deemed eligible, availability can limit access. Across the country waiting lists for Developmental Disabilities Services average five years [17]. To further complicate matters, available services may or may not fit the needs of transitioning graduates; what they need may simply not be available in their area. Another challenge is in obtaining and administering services. For the student, the necessary services are primarily provided within the school and by the school; school personnel manage and oversee the provision of these services. For adults, the task of identifying, selecting, applying for, and coordinating services from the confusing array of adult agencies is often times left to the graduate and his family.

For these reasons and many others, transition planning that incorporates IEP team assistance in forging early links between schools, adult services, funding agencies, families, and individuals with disabilities is essential to post-school employment success. The Model is specifically designed to encourage the early formation of these linkages.

For Matt, early interagency collaboration and the use of Social Security Work Incentives made the difference between employment and unemployment when he graduated. Prior to his graduation from high school, Vocational Rehabilitation funded his initial wages during the time he was learning the job, and a PASS plan was written and submitted to Social Security with the intent to begin funding follow-along supports and transportation the day after graduation. Matt was referred to Supported Employment Services through the State Developmental Disabilities Program and was on a waiting list for these services for three years. While waiting, his PASS plan funded his follow-along supports.

In Katie's case, obtaining her job at Wal-Mart required the school and Katie's mom to perform the job development. Tribal Vocational Rehabilitation (Section 121 of the Rehabilitation Act), provided funding for the job coach during the summer between her junior and senior year when Katie was not in school, and the school used their paraprofessional to job coach once school began again. By the time she graduated,

Katie was working at Wal-Mart without the support of a job coach. She utilized her Personal Care Attendant funds to pay for some minimal assistance that she still required at the job.

During Rick's transition planning his IEP team discovered that he was eligible for a PASS plan. His SSI check was being reduced because he also received SSDAC through his father's retirement account. A PASS plan totaling \$7,780 was approved and used to fund job coaching and computer tutoring while Rick was still in school. The PASS continued after he graduated at age 20. Funds targeted for people with disabilities at the local Workforce agency were utilized to purchase computer equipment to support Rick's employment.

Rick applied for Supported Employment Services through the local Developmental Disabilities office but there was a waiting list in the county where he lived. In the meantime, he received funds from a Developmental Disabilities Medicaid Waiver program called Community Supports in the amount of \$7,800 per year. He, his family, and his case manager identified his priority needs to be employment and recreation and leisure supports, and blended the available money to address these needs.

#### **14. The Montana Experience**

California and Maryland piloted a Transition Service Integration Model which combined funds from schools, Vocational Rehabilitation, and Developmental Disabilities agencies to support employment for students during their last year of high school [4]. In Montana, our Model and demonstration projects share the same end-goal of placement into paid employment with necessary supports prior to graduation. However, in Montana we have additional challenges. Montana is a predominantly rural state, and funding for career development and transition planning, to say nothing of ongoing supports, is scarce even in the best of times. Not all schools in Montana provide special education services to students through age 21, so there is less time to prepare students for life as adults and to connect them with necessary adult services. Waiting lists for Developmental Disabilities and Mental Health services are growing and not all agencies are equipped to provide supported employment services to students with the most significant disabilities.

Vocational Rehabilitation has only recently begun funding assessment and employment activities for students during their exit year of high school. (Previous-

ly Vocational Rehabilitation in many towns accepted applications for services only in the second semester of the student's senior year, which did not leave much time for accessing these funds prior to student graduation.) If the student is found to be in need of ongoing supports to maintain employment, Vocational Rehabilitation may not continue to fund employment services until and unless an adult agency such as Developmental Disabilities or VR Extended Employment Services is also serving the student. Some Vocational Rehabilitation offices will accept natural supports or Social Security Work Incentives as a demonstration of long-term support (or long-term signoff) for people who need ongoing supports, but this is not a consistent practice across the state. Thus, the majority of students with ongoing support needs graduating from special education services risk waiting for Vocational Rehabilitation Services AND Developmental Disabilities Services.

#### **15. Putting the Model to work in Montana Schools**

Implementation of the Model or its components varies from school to school. In schools which receive related services from the Bitterroot Valley Education Cooperative, a student may receive a Vocational Profile as an Occupational Therapy service. In Great Falls schools, Vocational Resource Educators (who primarily oversee vocational curriculum for the students) are writing the Profiles. Hamilton High School ran a pilot program which combined the student's Child Study Team meeting (the three-year re-evaluation meeting used to redetermine the student's eligibility for special education services) with an Employment Planning meeting in which identification of Ideal Conditions, Preferences, Contributions, and Job Tasks replaced the usual review of the student's deficits. In addition, instead of the School Psychologist, Occupational Therapist, Physical Therapist, and Speech Therapist submitting independent evaluations as is typically done, each contributed information to the Vocational Profile. The result was a single, rich, detailed, and integrated picture of who the student was, his current levels of performance, and his support needs rather than a collection of disconnected pieces of information detailing test scores.

For students in their exit year in Missoula schools, Vocational Rehabilitation offered the Vocational Profile as one option of a Vocational Evaluation that they would fund, and they provided a limited amount of funding for employment supports such as: job coaching, job

development, transportation, or assessment (which was provided by a VR-enrolled employment vendor). In instances where either of these options was chosen, the school, family and selected adult agency negotiated to decide who would provide each component (the Profile, the Representational Portfolio, Job Development, and Job Coaching), thereby blending their available funds and services and maximizing the supports for the student.

In the Mission Valley schools, the school psychologist and teachers took the lead in performing Discovery and writing Profiles. Adult agencies, including Vocational Rehabilitation, Workforce Investment, and Developmental Disabilities case managers were invited to the Employment Planning meetings. For several students, paid work experiences were developed based upon the information from their Employment Planning meetings. The Workforce Youth Coordinator developed the job sites and paid the student's wages for the length of the job trial. State Vocational Rehabilitation funded the job coaching that was purchased from a local employment vendor.

## 16. The future

Components of the Individualized Career Planning Model, such as the Vocational Profile, Employment Planning meeting, and Representational Portfolio have proven to be effective tools in creating employment and self-employment opportunities for students with significant disabilities [2]. When utilized in transition planning, these components enable schools to increase their compliance with Individuals with Disabilities Education Act of 1997 (IDEA) legislation [16]. These tools identify students' interests and preferences; define current levels of performance in relation to real life activities at home, work, school, and in the community; establish a plan for developing one post-school outcome—employment; identify accommodations and supports that enhance student success; and highlight areas where further instruction is needed in the context of the person's environment.

While the components are undeniably effective and make sense from the perspective of individuals with disabilities, families, adult services, and schools, we are finding that incorporating these tools into existing practices requires a somewhat larger commitment on the part of school staff than was expected. Engaging in Discovery and writing the Profile require that teachers change their typical evaluative or quantitative style of

writing to a more descriptive and qualitative style. The process also requires a change in philosophy: instead of getting kids "ready" for employment through education and skill building, the Model assumes they are ready and all that is needed is to discover each individual's ideal conditions of employment and potential contributions. Yet another challenge for schools is that the Model asks them to strive for placement into a paid job as an outcome of school. This goes against the conventional methodology in which the job of the school is to provide training experiences for young adults and the job of the adult agencies is to find employment after graduation. Implementing the Model also requires changes in staff roles and how they use their time. Although most teachers who participated in home visits during the Discovery process reported that the exercise was extremely valuable in gathering information about the student, these visits typically were not part of a teacher's routine or completed within their typical work hours.

The feedback from adult agencies has been positive. Employment providers assisting with job development for students say that the time it takes to develop a job is much reduced when they have a clear picture and plan (the Profile and the Customized Employment Planning Meeting minutes) to guide their job development efforts. Agencies that will eventually support a student after she graduates from school have expressed enthusiasm for the comprehensive summary of information (the Vocational Profile) which accompanies the student upon graduation. Now that funding from Montana Vocational Rehabilitation may be available to pay for Vocational Profiles for students in their last year of school, several Montana agencies have begun offering this service to schools and other adults whom they serve. We continue to explore where Workforce Investment services and funds fit into this model. The model has been piloted in two Workforce offices in the state, Bozeman and Lewistown. Ideally, the model components will be added to their existing menu of employment services offered to consumers.

The next steps include fine-tuning the technical assistance format to better and more efficiently enable schools and communities to implement the Individualized Career Planning Model components and incorporate these components into their transition practices, and pilot testing the model with other populations who experience substantial barriers to employment, such as young adults with deaf-blindness, autism, significant emotional disturbances, or significant physical challenges.

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