

# Transition Planning

## A Resource Guide to the Department of Human Services Programs and Offices

This was created by the  
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Students of transition age require thoughtful and careful planning toward their postschool goals. This planning requires the participation of the student, parents and others with special knowledge about the student. In many cases, the parents will be the ones to support the student. However, for those students of transition age who are in foster care or otherwise not in a custodial relationship with their parents, other adults will fill the parent role.

This resource guide is the result of the collaboration between the Juvenile Rights Project, the Department of Human Services Programs and Offices, and the Department of Education, Office of Special Education. It is intended to provide contact information, role/responsibility of the agency, resources that the agency may provide, documentation needs of that agency and other pertinent information that may assist Individualized Education Program (IEP) teams to facilitate collaboration among programs and agencies to provide services. The agencies included are the:

Department of Human Services:

- Developmental Disabilities
- Foster Care and the Independent Living Program
- Self-Sufficiency
- Office of Vocational Rehabilitation Services
- Office of Mental Health and Addiction Services

Oregon Department of Education

- Office of Student Learning & Partnerships,  
Special Education Unit

## **Department of Human Services Developmental Disabilities**

### **Who is eligible for services for the Office of Developmental Disabilities?**

The individual must be determined to meet criteria in OAR 411-320-0080, Community Developmental Disability Program, Initial Diagnosis and Eligibility Determination. In general a diagnosis of mental retardation must have been made before the age of 18 or a diagnosis of a developmental disability. For developmental disability, the condition must start before the age of 22. The condition or impairment must be expected to last indefinitely and must not be otherwise primarily attributed to mental illness, substance abuse, etc. students with an IQ above 65 needs to be retested before the age of 18 to assure adult DD eligibility. DD eligibility for children ages 0-18 is provisional due to the developmental nature of childhood. Individuals over the age of 18 must also be eligible to receive, and be receiving, SSI to meet Title XIX eligibility and receive full Oregon Health Plan (OHP) benefits.

### **What is the agency representative's role in the student's life? When should a representative of the agency be invited to an IEP meeting to participate in transition planning?**

Children with mental retardation and developmental disabilities have a designated county case manager. The county case manager works with the student and family or guardian to determine services needed for the student after the age of 18. This almost always presumes the student will attend some type of IEP-driven school program until the age of 21.

Although counties are not required by the OARs to begin planning or determine eligibility for adult DD services until age 17.5, county case managers can and do attend IEP's at any age by parent/guardian invitation. Case manager participation varies from county to county, and may be prioritized given certain circumstances. For instance, a DD case manager really should be invited to attend IEP's when: a child is at risk of losing or significantly changing school services/programs; consultation is needed regarding a child's behavior/diagnosis; or a potential residential move at 18 conflicts with the child's preferred school placement. After the age of 18, an adult case manager or Personal Agent will attend IEP's if invited and will work to assure that the ISP for adult services is developed collaboratively to meet identified needs.

Currently, all children in state-contracted residential programs or proctor care service begin transition planning at age 17 with their SPD service coordinator who supplies information and supports the county in their adult service-planning role. School representatives are invited to participate as part of the child's ISP team in this process whenever possible and appropriate.

When planning for adult services for individuals with developmental disabilities, one of two approaches will be targeted:

- ✓ Persons living in their own or family home and who age out of school, will, during that final year, become eligible for the services from a Personal Agent/Brokerage to develop and implement a person centered plan to maintain in their home and community.
- ✓ Persons needing and eligible for adult comprehensive residential employment, and community supports an adult County case manager will be assigned.

*[Note: The county case manager, SPD service coordinator, and/or personal agent would be invited either as an "other individual" who has "knowledge or special expertise regarding the child" or as a representative of another agency "that is likely to be responsible for providing or paying for transition services" or both.]*

### **What possible resources are available toward attaining transition goals?**

Developmental Disabilities (DD) services after age 18 are voluntary unless a legal guardian or court mandates an individual into service. Most students want to continue services after age 18, but some do not. All individuals receive, or can receive, information and referral, service coordination, medical card, Supplemental Security Income (SSI), and Health Care Representative. All adults in service also receive case management and crisis services from individuals skilled and knowledgeable in the adult DD service system. For each person during transition and during adult services, the Individual Support Plan (ISP) outlines needs, services, resources, timelines and responsible persons.

**For persons receiving support service at a Brokerage**, a Personal Agent will assist the individual and the

designated team to develop a person-centered plan, identify all community and agency resources he or she may be eligible for and allocate specific support service benefits. All benefits are used to maintain an individual at home and in their community. They can be used in conjunction with but cannot replace school or other agency funds. An individual's designated budget may be used to pay individuals or organizations to provide essential supports, including:

- ✓ Supports to keep person in the home—in home support or training, home adaptations, family training, therapies above level available in Health Plan, respite care.
- ✓ Supports to engage person in the community—job coaching, supported employment, community inclusion, and transportation.

For persons receiving comprehensive services through a county, services may include a range of individually planned supports such as in-the-family-home or out-of-home residential support in a semi-independent living, supported living, foster care or group care setting, and employment, community inclusion, paid personal assistant or job coach if applicable.

**Does the agency conduct planning meetings for the child? When do they occur? What is the focus of these meetings?**

The Individual Service Plan (ISP) meetings in the DD system take place annually or more frequently if changes need to be addressed. The ISP Team or planning body will include, at a minimum, the individual, the guardian (if applicable) and the agency representative (case manager, Personal Agent). Other mandated Team members depend upon the relevant OAR and could include: others identified as important by the person/client, service providers, education representatives, or others necessary to support the individual.

The process is prescribed by OAR and includes, but is not limited to the following: what the person wants; what the person needs; what is working and not working in the person's life; goals and action plans; risks to the person and from the person; safety plans; health, medical needs and services; mental health services; employment and community activities; supervision levels; behavior strategies and interventions; financial management; personal property review; legal requirements and contact with family and friends. Each person's plan is unique, depending on the person's needs, desires and abilities.

All members of the Team develop the plan and sign the plan with the full participation or presence of the individual, depending on the person's condition.

**State contact for DHS, Developmental Disabilities:**

Janette C. Williams, 503-945-9800

[Janette.C.Williams@state.or.us](mailto:Janette.C.Williams@state.or.us)

## **Department of Human Services Foster Care and the Independent Living Program**

### **Who is eligible for Independent Living Program Services?**

For students in DHS foster care, beginning at age 14 considerations may be given to develop a Comprehensive Transition Plan for students transitioning out of foster care. At age 16 it is required.

### **What is the agency representative's role in the student's life? When should a representative of the agency be invited to an IEP meeting to participate in transition planning?**

The DHS caseworker works with the foster family to determine services needed for the child's safety, permanency, and well-being. The foster parent's role is to provide for the daily needs of the child. The Independent Living Program (ILP) worker's role is to help youth prepare for their transition to adulthood and independence by providing life skills training.

School districts should invite the DHS caseworker and foster parent(s) to the IEP meeting for students of any age in foster care. For foster youth age 14 and older participating in the Independent Living Program (ILP), their ILP worker should also be invited to participate.

*[Note: The foster parent may be appointed as surrogate parent for the student and attend in that capacity. If not, the surrogate may be invited as an "other individual" who has "knowledge or special expertise regarding the child." The DHS caseworker and ILP worker would be invited either as an "other individual" who has "knowledge or special expertise regarding the child" or as a representative of another agency "that is likely to be responsible for providing or paying for transition services" or both.]*

### **What possible resources are available toward attaining transition goals?**

All foster children can receive information and referral, service coordination, and a medical card. The ILP is a voluntary program. However, each youth involved in the ILP receives skills training, guidance and planning services provided by the ILP contractor.

### **What are the common documentation needs for the agency?**

There are two primary requirements of documentation: 1) Legal— court reports, Citizen Review Boards, Administrative Hearings, and 2) Individual—service plans for children, youth and family; regular assessments; ongoing evaluation; and monitoring of services.

The Independent Living Program conducts a life skills assessment, develops a Youth's Service Plan, and provides monthly progress updates to the DHS caseworker. The Youth's Service Plan must be updated at least once every six months. The student, foster parent, and DHS caseworker are all to be involved in developing the Youth's Service Plan. A youth service plan may be substituted or incorporated into a Comprehensive Transition Plan if all the key elements are identified.

### **Does the agency conduct planning meetings for the child? When do they occur? What is the focus of these meetings?**

There are several planning meetings during the time a child welfare case is open. Family Decision Meetings (FDM) focus on bringing together the family, student, DHS staff, service providers and other supports to discuss the need for transition and how to best support the family and child through this transition. Court hearings and reviews occur at a minimum of every six months. The court reviews the status of the case and services being provided. As mentioned above, if a student is involved in the ILP, the ILP updates the Youth's Service Plan every six months.

### **State contacts for Foster Care and Independent Living:**

#### **Foster Care Coordinators**

<http://www.dhs.state.or.us/children/fostercare/>  
Tri-County Metro Region—Catherine Stelzer, 503-945-6637,

[Catherine.R.Stelzer@state.or.us](mailto:Catherine.R.Stelzer@state.or.us)

Western Region – Caroline Burnell, 503-945-6617,

[Caroline.Burnell@state.or.us](mailto:Caroline.Burnell@state.or.us)

Southern/Eastern Region – Milli Morisette, 503-

945-6635,

[Milli.Morisette@state.or.us](mailto:Milli.Morisette@state.or.us)

#### **Independent Living Program (ILP)**

[http://www.dhs.state.or.us/children/fostercare/ind\\_living/index.htm](http://www.dhs.state.or.us/children/fostercare/ind_living/index.htm)

Rosemary Lavenditti, 503-945-5688,

[Rosemary.lavenditti@state.or.us](mailto:Rosemary.lavenditti@state.or.us)

## **Department of Human Services Self- Sufficiency**

### **Who is eligible for services?**

To determine eligibility, documentation is needed to verify residence, identity, income and resources, and age. We also need a Social Security card. For a student on Temporary Assistance to Needy Families (TANF) whose JOBS plan is to attend school, verification of attendance is also needed.

### **What is the role of the agency representative in the child's life? At what stage in the transition plan should a representative from the agency attend an IEP meeting?**

The Self-Sufficiency case manager helps the child and the family become self-sufficient and addresses the barriers that are keeping the child or his or her family from becoming self-sufficient. For teens, there is an emphasis on education as the means to become self-sufficient. If it is a TANF case, the Self-Sufficiency case manager should be involved as soon as possible.

*[Note: The Self-Sufficiency case manager would be invited either as an "other individual" who has "knowledge or special expertise regarding the child" or as a representative of another agency "that is likely to be responsible for providing or paying for transition services" or both.]*

### **What possible resources are available toward attaining transition goals?**

JOBS funds and support service dollars are possible resources.

### **Does the agency conduct planning meetings for the child? When do they occur?**

Teen parents on TANF will have a JOBS plan. The focus of the JOBS plan is on activities that will help the teen eventually become self-sufficient, particularly educational activities and barrier-removal activities.

For teens whose parent(s) are on a TANF grant, the Self-Sufficiency case manager may place ensuring that the teen attends school as a JOBS activity for the teen's parent(s). However, this is not done in all areas of the state.

### **State contact for Self Sufficiency:**

Web: <http://www.dhs.state.or.us/policy/selfsufficiency/index.htm>

Phil Laymon 503-945-6128

[Philip.L.Laymon@state.or.us](mailto:Philip.L.Laymon@state.or.us)

## **Department of Human Services Office of Vocational Rehabilitation Services**

### **Who is eligible for services?**

"Any individual who has a physical or mental impairment which for such individual constitutes or results in a substantial impediment to employment" OVRs eligibility requirements follow federal and state rules. Federal and state regulations are very specific about eligibility for OVRs services. The key issue is whether the person has a "significant impediment to employment."

Medical, mental health, or other information, signed by a medical, mental health practitioner, or other professional that establishes a substantial impediment to employment is required documentation.

### **When should a representative of the agency be invited to an IEP meeting to participate in transition planning? What is the agency representative's role in the student's life?**

The role of the vocational rehabilitation counselor is to assist the student to achieve employment and independence by providing substantial counseling and guidance for vocational goal selection, providing resource information to access post-secondary education/ training, provide employment assistance, or provide information or access to resources that will help the student overcome substantial impediments to employment, training, or independent living and to assist the student in maintaining employment/independent living.

The vocational rehabilitation counselor should be invited as soon as the IEP team believes the student would benefit from vocational rehabilitation services. Typically this would occur during the student's junior year of high school. An OVRs transition liaison is available at each field office to answer questions and assist in the transition process.

*[Note: The Vocational Rehabilitation counselor would be invited either as an "other individual" who has "knowledge or special expertise regarding the child" or as a representative of another agency "that is likely to be responsible for providing or paying for transition services" or both.]*

### **What possible resources are available toward attaining transition goals?**

If no other resources exist to help with transition process or required services, i.e., employment or training, VR funds are available.

### **Does the agency conduct planning meetings for the child?**

Yes, at the field level when the student has been referred for vocational services; following application for services; planning and development of the Individualized Plan for Employment (IPE); and to monitor the IPE progress toward successful completion of employment.

These meetings occur at the time of referral and then as often as needed to insure successful progress toward achieving successful employment or independence. The purpose of the meetings and plans is to insure that the services proposed and/or provided are appropriate for the youth, taking into consideration the youth's interest, aptitudes, abilities, and informed choice.

### **State contact for Vocational Rehabilitation Services:**

Web: <http://www.dhs.state.or.us/vr/index.html>

#### **Transition**

Clayton Z. Rees, Youth Transition Programs Coordinator,  
503-945-6975,

[Clayton.Z.Rees@state.or.us](mailto:Clayton.Z.Rees@state.or.us)

#### **Policy**

Lynnae Ruttledge,  
Policy and Planning Manager,  
503-945-6262,

[Lynnae.Ruttledge@state.or.us](mailto:Lynnae.Ruttledge@state.or.us)

## **Department of Human Services Office of Mental Health and Addiction Services**

### **Who is eligible for services for the Office of Mental Health and Addiction Services?**

Mental health treatment services are available for adolescents who qualify for the Oregon Health Plan (OHP) and who have an Axis I covered diagnosis on the OHP prioritized list (<http://www.dhs.state.or.us/healthplan/priorlist/index.html>). Medicaid mental health services are managed through OHP Mental Health Organizations and most are provided through local county mental health programs ([http://www.dhs.state.or.us/mentalhealth/cmh\\_programs.htm](http://www.dhs.state.or.us/mentalhealth/cmh_programs.htm)). These services may include individual and family therapy, family psycho-educational support, school-based treatment services, case management and service coordination, psychiatry and medication management, treatment foster care, mobile crisis services, planned respite care, psychiatric day treatment, psychiatric residential treatment, acute inpatient hospitalization, and long-term inpatient hospitalization.

Substance abuse treatment services are available to adolescents throughout Oregon who are experiencing difficulties related to use of alcohol and other drugs. Outpatient, intensive outpatient, residential treatment, and medically managed inpatient services are provided by private, not-for-profit organizations, hospitals, and local community mental health agencies throughout Oregon. Adolescents requiring residential or inpatient services be assessed in an outpatient setting to determine substance use problem severity. A directory of licensed/approved adolescent substance abuse programs can be located through the DHS, OMHAS web site at <http://www.dhs.state.or.us/addiction/>.

OMHAS supports a 24-hour hotline for youth experiencing problems with substance use and addiction provided by the Oregon Partnership. The youth hotline number is 1-877-553-TEEN (8336). Adolescent substance abuse services are funded through a variety of mechanisms including private insurance, OHP Fully Capitated Health Plans, self-pay, and publicly funded (non-OHP) outpatient contracted through the local Community Mental Health Programs.

### **What is the agency representative's role in the student's life? When should a representative of your agency be invited to an IEP meeting to participate in transition planning?**

Mental health agency representation varies depending on the type and level of intensity of the services being provided. Mental health case coordinators should be invited to an IEP meeting to provide consultation regarding the adolescents' mental health needs and service coordination plan. This is especially true when there are significant mental health issues and placement changes that may affect transition goals.

### **What possible resources are available toward attaining his/her transition goals?**

Many mental health services are available that may help support transition goals. These services include, but are not limited to, case management, service coordination, skills training, symptom's management, medication management, individual therapy, etc.

### **Does your agency conduct planning meetings for the child? When do they occur?**

Adolescents that qualify for the OHP who are receiving mental health services have planning meeting that differ depending on the intensity of service provision. Monthly treatment planning meetings are held for adolescents receiving care in psychiatric day treatment programs, residential treatment programs and long-term inpatient psychiatric programs. Treatment planning meetings are also held for adolescents receiving intensive home and community-based mental health services. These meetings are organized by the case coordinator and occur as frequently as needed.

### **Who is the state contact for your agency?**

#### Mental Health:

Bill Bouska, Children's Treatment System Team Leader  
(503) 945-9717, [Bill.Bouska@state.or.us](mailto:Bill.Bouska@state.or.us)

#### Addictions:

Karen Wheeler, Addictions Program and Policy Manager  
(503) 945-6191, [Karen.Wheeler@state.or.us](mailto:Karen.Wheeler@state.or.us)

**Oregon Department of Education  
Office of Student Learning & Partnerships  
Special Education Unit**

**Who is eligible for services?**

Students who have been found eligible for services under the Individuals with Disability Education Act '97 (IDEA '97) are eligible for transition services beginning at age 14 (or younger if appropriate) and continuing until the student exits school.

See OAR 581-015-0051 for eligibility requirements. (OAR 581-015-0068)

**What is the school's role in the student's life?**

The school district is responsible to provide a Free Appropriate Public Education (FAPE) in the Least Restrictive Environment (LRE) to all eligible students. For students of transition age (14 yrs. or younger if appropriate) the school district is also responsible to ensure that the student has available the supports and services necessary for the student to achieve postschool goal(s). OAR 581-015-0066 states in part, "the school district shall also invite a representative or any other agency that is likely to be responsible for providing or paying for transition services. If an agency invited to send a representative to a meeting does not do so, the school district shall take other steps to obtain the participation of the other agency in the planning of any transition services."

However, what those supports and services are will vary from student to student as those decisions are made by the student's Individualized Education Program (IEP) Team when they are working with the student, parent, other agency staff as appropriate, etc., to develop the student's IEP.

**What possible resources are available toward attaining transition goals?**

The IEP team will determine resources necessary for the student to achieve IEP/Transition goals based on the individualized education needs of the student. Transition services may include instruction, related services, community experiences, the development of employment and other post school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation. OAR 581-015-0005(35)

**What are the common documentation needs for schools?**

All students who are IDEA eligible must have a current IEP and eligibility. The student will also have evaluation documentation. School districts must also provide IEP progress reports at least as often as progress reports are provided to the parents of nondisabled students.

**Does the agency conduct planning meetings for the child? When do they occur? What is the focus of these meetings?**

IDEA requires that an IEP meeting be conducted at least every 365 days. However, a parent, student or school staff may request an IEP meeting at any time.

The focus of the IEP meeting for students of transition age is to develop an IEP that meets the educational and postschool needs of the student. The content of the IEP is individualized to the student.

**Contact for education services:**

**Local school districts are responsible for transition planning for students. The first contact would be with the student's special education teacher or special education case manager. For district wide information, the best person to contact is the school district special education director.**

**Additional Resources**

Oregon Department of Education

<http://www.ode.state.or.us/>

Jackie Burr, Transition Specialist

[jackie.burr@state.or.us](mailto:jackie.burr@state.or.us)

**For Homeless Students:**

District's homeless coordinator

State Homeless Coordinator:

Dona Bolt, 503-378-3600,

ext. 2727

[Dona.Bolt@state.or.us](mailto:Dona.Bolt@state.or.us)