Start Where You Want to "End": Annotated Backwards Planning Template

Start Where You Want to "End"

Transition from school to adult life is an important time for all youth. Backwards Planning is an effective tool for teams to use at this juncture. All good plans start with a vision or idea about the desired result. In the context of transition, Backwards Planning is an approach that a team can use to 'start with the end' in mind to provide guidance and direction for any youth as they prepare for adulthood. For youth with developmental disabilities it is critical for an interagency team to map out the preparation for community employment while the youth is in high school and to make the linkages necessary to adult serving agencies. Having a plan for transition is recognized as an Evidence Based Practice by the National Secondary Transition Technical Assistance Center (NSTTAC) (Halpern et al., 1995) and supported by data collected through the Ohio Longitudinal Transition Study (www.olts.org).

Using the Backwards Planning Template

The following pages provide a step-by-step guide for using the Backwards Planning template, illustrated with an example. Review this document as a way to prepare for your team to engage in Backwards Planning. Each page illustrates how the steps to Backwards Planning could be completed, as an example evolves. Since transition is required to be formally documented in the school district's IEP by age 14, the year before the youth turns age 14 is a good time to start Backwards Planning. However, the process of Backwards Planning works just the same and just as effectively with older or younger youth. It is suggested practice to actively involve the youth, his or her family and an interagency team of professionals to engage in Backwards Planning.

A Flexible Process

Backwards Planning is an informal process and is meant to be used flexibility. The example of Jeffrey shows one way to use Backwards Planning. It is not intended to depict that there is only one way for a team to work through developing a backwards plan. For example, as you will see, Jeff's plan uses one-year time spans for each Step in the plan. The time span for each Step can be shorter or longer than one year. Some Steps may span an entire calendar year or be designed to end at the same time as some other significant point in time for the youth, such as the end of a school year. See the Facilitator's Guide for more complete information about other flexible uses of Backwards Planning.

There are many advantages to using an informal process such as Backwards Planning to develop a transition plan with the youth.

- A team can use informal and agency-neutral language that can be understood by all team
 members
- Teams are not limited to thinking about only what is available or typical within each agency's system. They have the opportunity to focus first on the youth's needs, to discuss ideas and plans that are truly person-centered. And then to pool resources in order to provide a needed service or experience
- Team members can use portions of the Backwards Plan as the basis for documentation within required agency documents, by restating the information using agency terminology

- The process of Backwards Planning is familiar and easy to use since it is the way in which many
 of us approach projects requiring planning, such as planning for a home improvement project or a
 vacation.
- The act of Backwards Planning provides time and meaningful activity that individuals from different systems can take advantage of to develop professional relationships and become a true 'team'.
- The Backwards Plan provides a 'map' of progress, activity and services to follow the youth from school to adult life, providing a wealth of information to agency personnel or adult service providers who were not part of the initial team
- Multi-year planning allows personnel representing various agencies to make commitments and take responsibility for various facets of the plan, fulfilling the intent of federal law that transition is a 'coordinated set of activities.'
- All agencies will have required forms and documents. Backwards Planning provides a single document, a true transition plan, that the youth, family and professionals can work from to assure seamless services and supports transition with the youth as he/she moves from school based to adult services.

The Facilitator's Guide

This Facilitator's Guide is designed as a companion to the Annotated Template. The Facilitator's Guide has a more complete description, tips and examples so a team can learn more about developing a backwards plan.

The Annotated Template and the Facilitator's Guide are cross-referenced to each other throughout each document.



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Step 1: Youth's Name and Birthdate	NameJeffery	Birthdate05/08/1998	Time Span of this plan: Fron	n <u>09/12/2013</u> To	8/15/2019 Gradua	ation Year <u>2019</u> Team Coordinator	Ms. Perez
Step 2: Discuss and decide the duration of this plan. The time span of the plan can be revised and extended as needed	Adult Employment Outcome As an adult, I plan to:		Adult Education/Train As an adult, I plan to:	ing Outcome		lult Independent/Community Living Outco an adult, I plan to:	me
Step 3:							
The Graduation Year (or year	Current Assessment related to Milestones	Steps to reach Milestone	Steps to reach Milestone	Steps to reach Milestone	Steps to reach Milestone	Steps to reach Milestone	Milestones to be achieved by:

the youth will exit high school services) may, in many cases, be the same as the Milestone year (plan end). However, graduation may occur at some other point in this plan. Discuss and decide at what point graduation will occur. Once the plan is developed, it will be important to also determine how services might change and how they will continue to be funded and provided after graduation. Step 4 List the team coordinator's name and contact information



Step 5: Identify the youth's intended adult outcomes intended adult outcomes for employment, continued education/training and independent living. Adult outcomes are the actual goals the youth intends to achieve as an adult. These may change as more is learned about the worth's enforcement youth's preferences, interests, needs and skills.

NameJeffery	Birthdate05/08/1998_	Time Span of this plan: From	m09/12/2013To	<u>8/15/2019</u> Gra	aduation Year _.	Team Coordinator	Ms. Perez
Adult Employment Outcome As an adult, I plan to: Jeff intends to work in the communi and skills in working with hand tools	ity at a job that allows him to use his i	Adult Education/Trai As an adult, I plan to: Jeff will continue to lea learning activities.	ning Outcome am about living safely on his own by pa	articipating in organized	As an adult, I Jeff will conti	endent/Community Living Outco I plan to: tinue to live at home with his family a tting where he can have access to si	and eventually move into a commu-
Current Assessment related to Milestones	Steps to reach Milestone Target Year:	Steps to reach Milestone Target Year:	Steps to reach Milestone Target Year:	Steps to reach Mileste Target Year:	one	Steps to reach Milestone Target Year:	Milestones to be achieved by:



Step 6: Identify mil accomplish necessary f order for th

Identify milestones or	Name	Jeffery	Birthdate	05/08/1998	Time \$	Span of this plan: Fron	09/12/2013	To	8/15/2019 Gr	aduation Yea	ar 2019 Team Coordinato	rMs. Perez
accomplishments that are necessary to complete in order for the youth to achieve	Adult Employ As an adult, I p	ment Outcome lan to:				Adult Education/Train As an adult, I plan to:	ing Outcome			Adult Inde As an adult	pendent/Community Living Ou , I plan to:	tcome
one or more of the identified adult outcomes. For example, a milestone might be mastery of an important skill,		work in the communi rking with hand tools		vs him to use his ir	nterests	Jeff will continue to lea learning activities.	rn about living safely on	his own by par	rticipating in organized		ntinue to live at home with his fam etting where he can have access t	nily and eventually move into a commu- to supports to live on his own
completing an adult focused experience, or making a successful agency linkage. It may be helpful to discuss	Current Asses Milestones	ssment related to	Steps to reach M Target Year:	Ailestone	Steps to Target Yea	reach Milestone ar:	Steps to reach Miles Target Year:	stone	Steps to reach Milest Target Year:	tone	Steps to reach Milestone Target Year:	Milestones to be achieved by: 08/15/2019
a question such as "What will the youth need to learn or experience in order to be employed (continue to learn, live independently) in the type for independently in the type												Jeff is actively seeking the type of employment that meets his identified interests and skills
of job described by the adult outcome?" Also project the date when it is expected the youth will achieve the milestones.												Referrals/eligibility determination for OOD (RSC), DODD & other agencies is completed; on waiting list for group home
In most cases this will also be the same as the date the plan ends.												Consistently and independently manage hygiene and grooming with ongoing support
												Communicate effectively with co- workers and peers with support of mobile/asst technology
												Transition from one activity to another without incident with ongoing support
												Independently use public transportation for work, leisure and daily living with ongoing support



Step 7:

What is the baseline for the milestone? Identify current assessment data and information that describes the starting point for accomplishment of the milestone listed in the right hand column. For example, what is the current level of a targeted skill? Or what is the current status on linking with an important agency? Or what is the progress to date on arrangements for participation in a desired adult experience?

Take time to consider the GAP between the MILESTONE and the BASELINE.

"Closing the Gap" is the focus on the next steps.

Name	Jeffery	Birthdate	05/08/1998	Time	Span of this plan: Fron	n <u>09/12/2013</u>	To	8/15/2019	Graduation Ye	ar <u>2019</u>	Team Coordinator	Ms. Perez
Adult Employ As an adult, I	yment Outcome plan to:				Adult Education/Train As an adult, I plan to:	-			As an adul	t, I plan to:	nmunity Living Outco	
	work in the communi orking with hand tools		s him to use his i	nterests	Jeff will continue to lea learning activities.	rn about living safely on h	nis own by pa	rticipating in organized				and eventually move into a commu- upports to live on his own
Current Ass Milestones	essment related to	Steps to reach N Target Year:	lilestone	Steps to Target Yea	reach Milestone ar:	Steps to reach Miles Target Year:	tone	Steps to reach Mile Target Year:	stone	Steps to re Target Year:	ach Milestone	Milestones to be achieved by: 08/15/2019
hand tools to doesn't put th	d coordination. Uses take things apart, em back together ferences or interest file											Jeff is actively seeking the type of employment that meets his identified interests and skills
a job & suppo coach, ongoin	assistance to find rts, such as a job g financial assistance ing expenses, and its.											Referrals/eligibility determination for OOD (RSC), DODD & other agencies is completed; on waiting list for group home
	itor appearance or has the physical and ry to do so											Consistently and independently manage hygiene and grooming with ongoing support
although he e	cult to understand njoys initiating with people he does ow											Communicate effectively with co- workers and peers with support of mobile/asst technology
activity to ano	oving from one ther, especially when a favorite activity to vored activity											Transition from one activity to another without incident with ongoing support
Jeff relies on o around the co	others for getting mmunity											Independently use public transportation for work, leisure and daily living with ongoing support



Jeffery 09/<u>12/2013</u> Time Span of this plan: From Graduation Year 2019 Team Coordinator Ms. Perez Birthdate 05/08/1998 То 8/15/2019 Imagine the youth's plan one Name year before the Milestone Adult Employment Outcome Adult Education/Training Outcome Adult Independent/Community Living Outcome year. In relation to EACH As an adult I plan to: As an adult I plan to: As an adult I plan to: milestone, what step should Jeff will continue to learn about living safely on his own by participating in organized Jeff will continue to live at home with his family and eventually move into a commube accomplished by the end Jeff intends to work in the community at a job that allows him to use his interests learning activities. nity living setting where he can have access to supports to live on his own of this year to assure the and skills in working with hand tools youth is ready to accomplish the final step and achieve the Current Assessment related to Steps to reach Milestone Milestones to be achieved by: For example, what skill, Milestones Target Year Target Year Target Year Target Year 08/15/2019 Target Year 06/10/2014 06/15/2015 06/13/2016 06/12/2017 7/12/2018 experience, and /or agency linkage will the youth need Good eye-hand coordination. Uses Refer for formal vocational Supervised in school work Job shadowing in a number of jobs Job tryouts Arrange Internships in community Jeff is actively seeking the type to accomplish during this hand tools to take things apart. evaluation: use informal interest and employment settings that are iobs that are a match for Jeff's of employment that meets his experience year in order to achieve the doesn't put them back together and preferences inventories a match for Jeff's interests and profile as an employee identified interests and skills identified milestone? Be sure No career preferences or interest preferences. inventories on file to consider Evidence Based Practices. Identify the date (in Jeff will need assistance to find Refer to DD; Invite DD SSA to Refer to OOD (RSC) Application to SSI Continue to meet with OODA Meet with possible adult service Referrals/eligibility determination the year previous to the plan (RSC) and DD; invite to IEP for OOD (RSC), DODD & other a job & supports, such as a job IEP meeting to discuss options, providers for employment, end date) when the youth is coach, ongoing financial assistance process, benefits meetings, communicate on a continued education and services agencies is completed; on waiting expected to achieve the set of for income, living expenses, and regular basis: consider benefits for living in the community list for group home Milestones in this column. medical benefits analysis The time span for this column Does not monitor appearance or Collect data about specific Provide specific instruction in skills Monitor appearance; fade supports Provide daily positive feedback for Support Jeff' to maintain hygiene/ Consistently and independently may be one calendar year, grooming but has the physical and grooming/hygiene skills that are as needed; Continue to monitor that rely on other people; maintain meeting hygiene and grooming grooming habits with positive manage hygiene and grooming cognitive ability to do so lacking; design checklists/visual effectiveness of checklists/visual visual supports so Jeff can monitor expectations feedback for meeting expectations with ongoing support one school year, or a longer supports for intervention supports appearance independently or shorter period of time. Continue to plan backwards, moving one column to the Speech is difficult to understand Speech and AT evaluation Monitor effectiveness of strategies Extend opportunities to practice Fade adult provided supports so Observe Jeff for effective social Communicate effectively with coright to the current year. although he enjoys initiating to determine instruction. implemented in academic to new, novel settings in the Jeff can be independent in using and job related communication workers and peers with support of and social settings; provide conversation with people he does therapy, devices, supports, community such as banks, stores, tech supports in a variety of adult and conversation in a variety of mobile/asst technology or doesn't' know mobile technology; implement opportunities to practice on public transportation settings settinas recommendations Acts out in moving from one Gather assessment data by Monitor effectiveness of selected Observe transitions in community Fade adult provided supports so Continue to monitor effectiveness Transition from one activity to activity to another, especially when observation/FBA of transitions interventions in academic and settings; monitor effectiveness Jeff can be independent in using of selected interventions another without incident with asked to stop a favorite activity to in a variety of settings/activities; home setting of current interventions in new support for transition without ongoing support go to a less favored activity design/implement interventions settings incident Jeff relies on others for getting Gather assessment data about Continue travel training Coordinate travel training with Supervise increasingly Monitor increasingly independent Independently use public around the community Jeff's skills relative to safe travel other services that are part of this independent use of public use of public transportation transportation for work, leisure and using public transportation plan job shadow, communication, transportation daily living with ongoing support transitioning



Step 8:

milestone?



Step 9: Implement, revise and update	NameJeffery	Birthdate 05/08/1998	Time Spa	an of this plan: From	09/12/2013 To	8/15/2019 Grad	duation Yea	ar 2019 Team Coordinator	Ms. Perez
this plan as new assessment data and information is gathered, activities are	Adult Employment Outcome As an adult, I plan to:			dult Education/Train s an adult, I plan to:	ing Outcome		Adult Independent/Community Living Outcome As an adult, I plan to:		
completed and/or as Adult Outcomes change or become more focused.	Jeff intends to work in the communi and skills in working with hand tools	ty at a job that allows him to use his ir	lea	arning activities. Jeff v	n about living safely on his own by pa vill also participate in training specific d to learn skills and routines for his jol	to obtaining and main-	Jeff will continue to live at home with his family and eventually move into a commu- nity living setting where he can have access to supports to live on his own		
Ongoing collection of progress data on each 'Step" will inform the rate and level of progress during the	Current Assessment related to Milestones	Steps to reach Milestone Target Year: 06/10/2014	Steps to read Target Year: 06/15/2015	ich Milestone	Steps to reach Milestone Target Year: 06/13/2016	Steps to reach Milesto Target Year: 06/12/2017	one	Steps to reach Milestone Target Year: 7/12/2018	Milestones to be achieved by: 08/15/2019
course of the time span. The team can make adjustments and revisions at any time as necessary, as indicated by the data and any new information.	Good eye-hand coordination. Uses hand tools to take things apart, doesn't put them back together No career preferences or interest inventories on file	Refer for formal vocational evaluation; use informal interest and preferences inventories	Supervised in school work experience jobs with ability to move around the school building and interact with teachers (deliver messages to and from office?)		Job shadowing in a number of jobs and employment settings that are a match for Jeff's interests and preferences. Stocking shelves in hardware store?	Job tryouts Auto parts store, distribution center, materials handling?		Arrange Internships in community jobs that are a match for Jeff's profile as an employee	Jeff is actively seeking the type of employment that meets his identified interests and skills
For example, the team updated/revised this plan (red font) based on results from vocational evaluation and interest/preferences	Jeff will need assistance to find a job & supports, such as a job coach, ongoing financial assistance for income, living expenses, and medical benefits.	Refer to DD; Invite DD SSA to IEP meeting and BP meetings to discuss options, process, benefits and behavior strategies. Refer to OOD (RSC)		(RSC) or eligibility for adult to discuss options	Application to SSI	Continue to meet with O (RSC) and DD; invite to If meetings, communicate regular basis; consider be analysis	EP on a	Meet with possible adult service providers for employment, continued education and services for living in the community	Referrals/eligibility determination for OOD (RSC), DODD & other agencies is completed; on waiting list for group home
inventories	Does not monitor appearance or grooming but has the physical and cognitive ability to do so	Collect data about specific grooming/hygiene skills that are lacking; design checklists/visual supports for intervention	as needed; Co	ic instruction in skills ontinue to monitor of checklists/visual	Monitor appearance; fade supports that rely on other people; maintain visual supports so Jeff can monitor appearance independently	Provide daily positive fee meeting hygiene and gro expectations Teach use of monitoring app	oming	Support Jeff' to maintain hygiene/ grooming habits with positive feedback for meeting expectations Use app to self prompt and check hygiene /grooming	Consistently and independently manage hygiene and grooming with ongoing support using technology app
	Speech is difficult to understand although he enjoys initiating conversation with people he does or doesn't' know	Speech and AT evaluation to determine instruction, therapy, devices, supports, mobile technology; implement recommendations	Monitor effecti implemented i and social setti opportunities t	ings; provide	Extend opportunities to practice to new, novel settings in the community such as banks, stores, on public transportation	Fade adult provided supp Jeff can be independent tech supports in a variety settings	in using	Observe Jeff for effective social and job related communication and conversation in a variety of settings	Communicate effectively with co- workers and peers with support of mobile/asst technology
	Acts out in moving from one activity to another, especially when asked to stop a favorite activity to go to a less favored activity	Gather assessment data by observation/FBA of transitions in a variety of settings/activities; design/implement interventions		iveness of selected n academic and	Observe transitions in community settings; monitor effectiveness of current interventions in new settings	Fade adult provided supp Jeff can be independent support for transition wit incident	in using	Continue to monitor effectiveness of selected interventions	Transition from one activity to another without incident with ongoing support
	Jeff relies on others for getting around the community	Gather assessment data about Jeff's skills relative to safe travel using public transportation	Continue trave Drivers Educat Tutoring	el training tion Instruction -	Coordinate travel training with other services that are part of this plan job shadow, communication, transitioning	Supervise increasingly- independent use of publ transportation Increase driving practice ed./Tutoring for test		Monitor increasingly independent- use of public transportation- takes and passes drivers test	Independently use public transportation for work, leisure- and daily living with ongoing- support-drives to and from work, around the community



Adult Employment Outcome As an adult, I plan to:		Adult Education/Train As an adult, I plan to:	ning Outcome		Adult Inde As an adul	ependent/Community Living Outco t, I plan to:	me		
leff intends to work in the communit and skills in working with hand tools	ty at a job that allows him to use his i	learning activities. Jeff	rn about living safely on his own by pa will also participate in training specific d to learn skills and routines for his jo	to obtaining and main-		ntinue to live at home with his family setting where he can have access to s			
Current Assessment related to Milestones	Steps to reach Milestone Target Year: 06/10/2014	Steps to reach Milestone Target Year: 06/15/2015	Steps to reach Milestone Target Year: 06/13/2016	Steps to reach Milesto Target Year: 06/12/2017	ne	Steps to reach Milestone Target Year: 7/12/2018	Milestones to be achieved by: 08/15/2019		
Sood eye-hand coordination. Uses hand tools to take things apart, Joesn't put them back together Vo career preferences or interest inventories on file	Refer for formal vocational evaluation; use informal interest and preferences inventories	Supervised in school work experience jobs with ability to move around the school building and interact with teachers (deliver messages to and from office?)	Job shadowing in a number of jobs and employment settings that are a match for Jeff's interests and preferences. Stocking shelves in hardware store?	Job tryouts Auto parts store, distribution center, materials handling?		Arrange Internships in community jobs that are a match for Jeff's profile as an employee	Jeff is actively seeking the type of employment that meets his identified interests and skills		
leff will need assistance to find job & supports, such as a job coach, ongoing financial assistance or income, living expenses, and medical benefits.	Refer to DD; Invite DD SSA to IEP meeting and BP meetings to discuss options, process, benefits and behavior strategies. Refer to OOD (RSC)	Refer to OOD (RSC) Refer to DD for eligibility for adult services and to discuss options and benefits	Application to SSI	Continue to meet with OODA (RSC) and DD; invite to IEP meetings, communicate on a regular basis; consider benefits analysis		Meet with possible adult service providers for employment, continued education and services for living in the community	Referrals/eligibility determinatic for OOD (RSC), DODD & other agencies is completed; on wait list for group home		
Does not monitor appearance or grooming but has the physical and cognitive ability to do so	Collect data about specific grooming/hygiene skills that are lacking; design checklists/visual supports for intervention	Provide specific instruction in skills as needed; Continue to monitor effectiveness of checklists/visual supports	Monitor appearance; fade supports that rely on other people; maintain visual supports so Jeff can monitor appearance independently	Provide daily positive feedback for meeting hygiene and grooming expectations Teach use of self monitoring app		Support Jeff' to maintain hygiene/ grooming habits with positive feedback for meeting expectations Use app to self prompt and check hygiene /grooming	Consistently and independently manage hygiene and grooming with ongoing support using technology app		
peech is difficult to understand Ithough he enjoys initiating onversation with people he does r doesn't' know	Speech and AT evaluation to determine instruction, therapy, devices, supports, mobile technology; implement recommendations	Monitor effectiveness of strategies implemented in academic and social settings; provide opportunities to practice	Extend opportunities to practice to new, novel settings in the community such as banks, stores, on public transportation	Fade adult provided supports so Jeff can be independent in using tech supports in a variety of adult settings		Jeff can be independent in using tech supports in a variety of adult		Observe Jeff for effective social and job related communication and conversation in a variety of settings	Communicate effectively with workers and peers with suppor mobile/asst technology
	Gather assessment data by observation/FBA of transitions in a variety of settings/activities; design/implement interventions	Monitor effectiveness of selected interventions in academic and home setting	Observe transitions in community settings; monitor effectiveness of current interventions in new settings	Fade adult provided supports so Jeff can be independent in using support for transition without incident		Jeff can be independent in using support for transition without		Continue to monitor effectiveness of selected interventions	Transition from one activity to another without incident with ongoing support
leff relies on others for getting around the community	Gather assessment data about Jeff's skills relative to safe travel using public transportation	Continue travel training Drivers Education Instruction - Tutoring	Coordinate travel training with other services that are part of this plan job shadow, communication, transitioning	Supervise increasingly- independent use of public- transportation Increase driving practice/ drivers ed./Tutoring for test		Monitor increasingly independent- use of public transportation- takes and passes drivers test	Independently use public- transportation for work, leisure and daily living with ongoing- support drives to and from wo around the community		

Step 10: Use information from the Backwards Planning Chart as the basis for documentation required in various agency required in various agency documents. For example, the Adult Employment Outcome could be reworded for the Postsecondary Goal for Employment in the IEP or as a Vocational Goal for the IPE; the 'Steps' may be restated using agency terminology using agency terminology as services in the providing agency's document.

