

Using the Backwards Planning Template

Step-By-Step Directions

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.

Step 1:

Youth's Name and Birthdate

Name Jeffery Birthdate 05/08/1998 Time Span of this plan: From 09/12/2013 To 8/15/2019 Graduation Year 2019 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

<p>Adult Employment Outcome As an adult, I plan to:</p>	<p>Adult Education/Training Outcome As an adult, I plan to:</p>	<p>Adult Independent/Community Living Outcome As an adult, I plan to:</p>
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Step 3:

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

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

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 Milestone Target Year:	Steps to reach Milestone Target Year:	Milestones to be achieved by:

Step 5:

Identify the youth's 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 youth's preferences, interests, needs and skills.

Name Jeffery Birthdate 05/08/1998 Time Span of this plan: From 09/12/2013 To 8/15/2019 Graduation Year 2019 Team Coordinator Ms. Perez

<p>Adult Employment Outcome As an adult, I plan to:</p> <p>Jeff intends to work in the community at a job that allows him to use his interests and skills in working with hand tools</p>	<p>Adult Education/Training Outcome As an adult, I plan to:</p> <p>Jeff will continue to learn about living safely on his own by participating in organized learning activities.</p>	<p>Adult Independent/Community Living Outcome As an adult, I plan to:</p> <p>Jeff will continue to live at home with his family and eventually move into a community living setting where he can have access to supports to live on his own</p>
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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 Milestone Target Year:	Steps to reach Milestone Target Year:	Milestones to be achieved by:

Step 6:

Identify milestones or accomplishments that are necessary to complete in order for the youth to achieve one or more of the identified adult outcomes. For example, a milestone might be mastery of an important skill, completing an adult focused experience, or making a successful agency linkage. It may be helpful to discuss 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 of job described by the adult outcome?"

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

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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 Milestone Target Year:	Steps to reach Milestone Target Year:	Milestones to be achieved by: 08/15/2019
						Jeff is actively seeking the type of employment that meets his identified interests and skills
						Referrals/eligibility determination for OOD (RSC), DODD & other agencies is completed; on waiting list for group home
						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.

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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 Milestone Target Year:	Steps to reach Milestone Target Year:	Milestones to be achieved by: 08/15/2019
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						Jeff is actively seeking the type of employment that meets his identified interests and skills
Jeff will need assistance to find a job & supports, such as a job coach, ongoing financial assistance for income, living expenses, and medical benefits.						Referrals/eligibility determination for OOD (RSC), DODD & other agencies is completed; on waiting list for group home
Does not monitor appearance or grooming but has the physical and cognitive ability to do so						Consistently and independently manage hygiene and grooming with ongoing support
Speech is difficult to understand although he enjoys initiating conversation with people he does or doesn't know						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						Transition from one activity to another without incident with ongoing support
Jeff relies on others for getting around the community						Independently use public transportation for work, leisure and daily living with ongoing support

Step 8:

Imagine the youth's plan one year before the Milestone year. In relation to EACH milestone, what step should be accomplished by the end of this year to assure the youth is ready to accomplish the final step and achieve the milestone?

For example, what skill, experience, and /or agency linkage will the youth need to accomplish during this year in order to achieve the identified milestone? Be sure to consider Evidence Based Practices. Identify the date (in the year previous to the plan end date) when the youth is expected to achieve the set Milestones in this column.

The time span for this column may be one calendar year, one school year, or a longer or shorter period of time. Continue to plan backwards, moving one column to the right to the current year.

Name	Jeffery	Birthdate	05/08/1998	Time Span of this plan: From	09/12/2013	To	8/15/2019	Graduation Year	2019	Team Coordinator	Ms. Perez
Adult Employment Outcome As an adult, I plan to: Jeff intends to work in the community at a job that allows him to use his interests and skills in working with hand tools				Adult Education/Training Outcome As an adult, I plan to: Jeff will continue to learn about living safely on his own by participating in organized learning activities.				Adult Independent/Community Living Outcome As an adult, I plan to: Jeff will continue to live at home with his family and eventually move into a community living setting where he can have access to supports to live on his own			

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 Milestone Target Year: 06/12/2017	Steps to reach Milestone Target Year: 7/12/2018	Milestones to be achieved by: 08/15/2019
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	Job shadowing in a number of jobs and employment settings that are a match for Jeff's interests and preferences.	Job tryouts	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
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 to discuss options, process, benefits	Refer to OOD (RSC)	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 determination for OOD (RSC), DODD & other agencies is completed; on waiting 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	Support Jeff' to maintain hygiene/ grooming habits with positive feedback for meeting expectations	Consistently and independently manage hygiene and grooming with ongoing support
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 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	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	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	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 travel training	Coordinate travel training with other services that are part of this plan job shadow, communication, transitioning	Supervise increasingly independent use of public transportation	Monitor increasingly independent use of public transportation	Independently use public transportation for work, leisure and daily living with ongoing support



Step 9:

Implement, revise and update this plan as new assessment data and information is gathered, activities are completed and/or as Adult Outcomes change or become more focused.

Ongoing collection of progress data on each "Step" will inform the rate and level of progress during the 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.

For example, the team updated/revised this plan (red font) based on results from vocational evaluation and interest/preferences inventories

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<p>Adult Employment Outcome As an adult, I plan to:</p> <p>Jeff intends to work in the community at a job that allows him to use his interests and skills in working with hand tools</p>	<p>Adult Education/Training Outcome As an adult, I plan to:</p> <p>Jeff will continue to learn about living safely on his own by participating in organized learning activities. Jeff will also participate in training specific to obtaining and maintaining employment and to learn skills and routines for his job.</p>	<p>Adult Independent/Community Living Outcome As an adult, I plan to:</p> <p>Jeff will continue to live at home with his family and eventually move into a community living setting where he can have access to supports to live on his own</p>

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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
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)	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 determination for OOD (RSC), DODD & other agencies is completed; on waiting 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
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 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	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
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Jeff 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 work, around the community

Step 10:

Use information from the Backwards Planning Chart as the basis for documentation 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 as services in the providing agency's document.

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