

## Transition AHEAD Roundtable Project

April 1, 2021 – March 31, 2022

### I. Current Project Description:

The **Transition AHEAD Roundtable** (year 1) is a pilot project aimed at addressing the transition needs and future action planning for youth and their families. The **Transition AHEAD Roundtable** [TAR] is focused on collaborating with emerging adults to find and support the kinds of actions and decision-making that will help them achieve greater levels of independence. In other words, we seek to facilitate a process that “engages and supports” the notion of the young adult becoming the “leader” of their own lives.

Year two activities are focused on further development of the model, application to other diverse populations, and expansion geographically through design of a telehealth approach. Project staff will collaborate with community partners to conduct 20 Roundtable events with youth with disabilities and their families. Recruitment efforts will ensure representation of youth with disabilities who are Native American and Hispanic, are in foster care, have hearing impairments and other severe disabilities, and range in age from 14 to 22. Implementation strategies will be developed and tested to determine the role of site liaisons and a telehealth platform to extend the Transition Roundtable model to suburban areas outside of Tucson, urban areas within Phoenix, rural and small towns around the state, and Tribal communities. Evaluation data and input/feedback from participants and community partners will inform sustainability beyond the project and establishment of a telehealth service modality at the Sonoran UCEDD available to interested youth and families around the state. Train the trainer methods will be produced to engage additional site liaisons and increase access for others through an expanded telehealth Roundtable conducted remotely.

### II. Work completed by March 11, 2021:

- ✓ Developed Transition *AHEAD* Roundtable: an ARIZONA model for a transition planning & action steps
- ✓ Developed a *virtual* model of the Transition AHEAD Roundtable in response to COVID-19 realities
- ✓ Conducted six Transition *Ahead* Roundtables, including in public, charter and tribal schools
- ✓ Inclusive of bi-lingual, Native American, non-English speaking, and non-verbal students
- ✓ Developed Transition Planner Worksheets [please see [Appendices](#)]
- ✓ Developed a “Follow up Report” template [please see [Appendices](#)]

### III. Description of the Transition AHEAD Roundtable

The Roundtable is a day-long, one-on-one set of activities. It is designed to purposefully engage both the young adult and their family in collaborative activities with Sonoran UCEDD staff and staff from outside agencies and organizations that address five key areas: *Employment, Healthcare, Education & Training, Relationships and Community, and Independent Living*. Importantly, this busy day culminates in a brief Roundtable presentation – led by the young adult – about what they have identified as their strengths, as well as key goals and meaningful supports they want in order to achieve their desired level of independence. The overall process is intended to help each emerging adult begin to achieve outcomes that connect to their own lifelong aspirations. It also helps the adults in their lives identify opportunities and actions they, too, can take to support those aspirations.

The young adult and family member[s] participate - sometimes separately and sometimes together – in activities that allow the team to get to explore, identify and support the young adult’s strengths, interests and vision for the future.

#### ***Transition AHEAD Roundtable Day: Schedule***

<b><i>TIME</i></b>	<b><i>FAMILY Schedule</i></b>	<b><i>YOUTH Schedule</i></b>
9:00 to 9:10	<i>Welcome &amp; Review of the Day</i>	<i>Welcome &amp; Review of the Day</i>
9:10 to 9:35	<i>Wellness &amp; Interests/Goals</i>	<i>Discussion with Peer Mentor</i>
9:35 to 10:00	Supported Decision Making	Wellness Interview/ Friendships & Relationships
10:00 to 10:55	Health Care Transition Conversation (TEG)	Health Care Transition Conversation (TEG)
10:55 to 11:05	BREAK	BREAK
11:05 to 11:30	Education & Post-Secondary	Education & Post-Secondary
11:30 to 11:55	Transition Resources (DD)	Interests (Personal, Education, & Work)

11:55 to 12:20	Benefits & Able Act	Interests (Personal, Education, & Work) <i>Cont'd</i>
	LUNCH	LUNCH
1:00 to 1:25	Transition Resources (IL)	Situational Assessment [Site #1]
1:25 to 1:50	Employment & JC/Provider (VR)	Situational Assessment [Site #2]
1:50 to 2:00	BREAK	BREAK
2:00 to 2:25	Transition Resources (Raising Special Kids)	Situational Assessment [Site #3]
2:25 to 2:50	Empowering Youth <i>(Family Planning &amp; Support Worksheet)</i>	Preparing for Debriefing <i>(Young Adult Transition Action Planner)</i>
2:50 to 3:05	Debriefing & Action Planning	Debriefing & Action Planning Presentation

As a result, each young adult, together with their family member and the Transition AHEAD multidisciplinary team, develops a set of “next steps” to greater independence in mutually identified areas. Finally, a follow up report is developed that addresses those next steps and provides specific content-area recommendations and action steps that are individualized to the young adult. The report is written to the young adult. It also contains meaningful information that could be shared with other key people involved in the young person’s transitions (e.g., school, health care, and adult services) should they choose to do so.

### **Logistics of a Virtual Transition *AHEAD* Roundtable:**

1. Identify participating Young Adult and a family member
2. Schedule date, time and place for Roundtable
3. Obtain signed Consent Form
4. Confirm Roundtable date/time with community partners:
  - a. Peer Mentors
  - b. Tohono O’odham Community College Disability Resource Specialist
  - c. Supported Decision Making Representative
  - d. Developmental Disability Agency Representative
  - e. Benefits Specialist
  - f. Independent Living Representative
  - g. Vocational Rehabilitation Representative

- h. Raising Special Kids Family Advocate
- 5. Determine and resolve technology access and needs
- 6. Conduct Pre-Roundtable Interview
  - a. Schedule time for the interview
  - b. Conduct semi-structured telephone interview with parent or guardian
  - c. 30-40 minutes long
- 7. Compose participant’s “Introductory Paragraph”
- 8. Disseminate “Introductory Paragraph” to outside community partners
- 9. Mail advance packet of TAR materials to family
- 10. Transition *AHEAD* Roundtable Day!
- 11. Debrief Roundtable experience with project staff
- 12. Collect feedback and satisfaction information from family
- 13. Project staff write up sections of the relevant to their role[s]
- 14. Draft and review “Transition Action Plan” document
- 15. Mail hard copy of “Transition Action Plan” document to participating Young Adult/Family
- 16. Follow-up with participants [to be defined]

**“Introductory Paragraph” Shared with Team prior to Roundtable**

D. is an 18-year-old in 12<sup>th</sup> grade in high school. He has a great imagination and his dream would be to become an astronaut. He loves to talk about space and learn more about it. He also enjoys playing various video games (mainly Minecraft) and this has helped with improving his ability to socialize with peers who also enjoy video games. D. has also recently taken up an interest in plants and animals. He would like to pursue work constructing buildings. Things he would like to improve upon are learning to be more responsible, such as taking medications as directed on his own, completing chores, and gaining independence. Learning to take initiative is also important. D gains personal benefits and accomplishment from helping others.

**IV. Successes & Barriers in Year 1:**

Successes	Barriers
Modified the SD TransitionINAction Clinic and developed a model approach with application to Arizona in response to the needs and cultural diversity of the state	
Reframed the Transition <i>AHEAD</i> Roundtable to be virtual	COVID-19 Pandemic
Mitigated lack of technology by providing Wifi and laptop when needed; printed and mailed documents as needed.	Lack of technology for some families (i.e.: Wifi, laptop for each person, printer, etc.)
Engaged 6 young adults and families as participants including.	

<ul style="list-style-type: none"> <li>• 1 tribal young adult &amp; family</li> <li>• 1 Spanish speaking young adult &amp; family with a significant disability</li> </ul>	
<p>Recruited AZ community partners to participate in Transition <i>AHEAD</i> Roundtable</p> <ul style="list-style-type: none"> <li>• Provided orientation training</li> <li>• Conducted focus group to obtain recommendations and feedback</li> </ul>	
<p>Created <i>Virtual Work Experiences</i> to learn to work remotely and virtually. For example, digitally created social media posts for a business</p>	<p>In-person situational assessments (real life work experience at a worksite in their community) not always possible due to COVID-19.</p>
<p>Received <b>exceptionally</b> positive feedback from young adults &amp; families</p>	
<p>Follow up report template created to address and guide the young adult's goals &amp; dreams</p>	
<p>Created a satisfaction survey and used an email and texting Qualtrics platform to gather participant responses</p>	
<p>Conducted a focus group with community partners to gather their input and feedback for improvement and sustainability</p>	

## V. Proposed Transition AHEAD Roundtable Project - Year 2

In **Year 1** of this project, the UCEDD's current professional team successfully piloted the Transition *AHEAD* Roundtable [TAR] – an innovative, “virtual” model for providing transition planning to emerging adults. Most prominently, this model was designed to intentionally identify and support each young adult's individualized strengths and opportunities for personal leadership as they act to achieve greater independence in this important life process. It has been an exciting and genuinely groundbreaking effort. Many of the successes and barriers relative to those activities are outlined above.

In **Year 2** of this project, we propose conducting a total of twenty [20] Transition Roundtables.

It is helpful to see these TAR activities as progressing through three phases:

### **Year 2 - Phase 1 [approximately 8 Roundtables]**

- A. TAR staff will incorporate “lessons learned” from the initial pilot experiences into an improved version of the Transition *AHEAD* Roundtable activities. This enhanced ***virtual model*** of the TAR combines:

1. the use of web-based technology [coordinated Zoom meetings and activities between the young adult, staff, parent[s] and outside agencies/organizations] as well as...
  2. the use of “situational assessments” conducted on-site (or virtually, if necessary) by current Sonoran UCEDD staff.
- B. Expand the development of the enhanced model of TAR to create a more socially and culturally responsive model by purposefully and systematically conducting TAR sessions in the following unique environments:
1. Native American Reservation communities
  2. Suburban extended area outside of Tucson
  3. Rural and small towns
  4. Urban Phoenix
- C. Systematically and purposefully provide TAR sessions to a diverse set of emerging adults. That is, TAR sessions will include youth with:
1. Hearing impairments
  2. In “foster care”
  3. Younger aged [14 and older].
  4. Native American youth
  5. Hispanic youth
- D. Staffing
- Develop a train-the-trainer approach for shifting the role of “lead staff person” to replace that role currently performed by one of the project consultants.
  - Other TAR staff will continue in current capacities and assume expanded roles to shift from development team to permanent sustainable Roundtable team.
  - Train Vocational Specialist [s] to assist and perform *situational assessments*.

## **Year 2 - Phase 2 [approximately 4 Roundtables]**

- A. The TAR team will initiate *development of key elements* that are anticipated to be critical for the design and implementation of a **telehealth model** of the Transition AHEAD Roundtable. This is an important shift – from virtual to telehealth!

It is important to note that during pilot activities the Roundtable shifted to a *virtual* format due to COVID, however, a member of the team was on site with the student providing support and conducting situational assessments. The proposed new “telehealth model” of TAR will allow us to build on what we have learned and to engage local “site liaisons” as the on-site contact person to assist with implementing the Roundtable activities. with the project team through a completely distance platform. The testing of this will allow us to identify what is necessary and important to maintain fidelity of implementation by the project team with these and future site liaisons. The resulting impact is expansion of a

sustainable telehealth model that can be accessed by interested participants anywhere in the state.

- B. Establish “formal” connections with at least two individuals who will perform as site liaisons on the ground in two distant communities. During this phase as the approach is being developed, it is anticipated that school personnel such as a teacher or transition coordinator, will be most suited in this role due to their connections to the student and family and physical proximity during the school day. Site liaisons are envisioned as: “adult individuals who have an existing professional connection with the emerging adult[s] with whom they will work as well as a viable connection and understanding of their community”.
- C. TAR Site Liaisons will:
  - 1. Receive initial training with regard to the mission and goals of TAR.
  - 2. Participate with the current TAR team by coordinating services to the young adults in their relevant communities.
- D. Identify and develop the essential materials and processes necessary to recruit and train additional “liaison facilitators” to participate in TAR activities in their relevant communities.

### **Year 2 – Phase 3 [approximately 8 Roundtables]**

- A. Identify areas that meet the demographics above and recruit four to five site liaisons. Provide orientation and training for site liaisons. Obtain input on the design and implementation of the telehealth Roundtable.
- B. Design and pilot a **telehealth model** across diverse settings and populations. Identify 8 participants estimated at two per site liaison.
- C. Develop strategies for virtual work and situational assessments and participation of local partners.
- D. Conduct the Roundtable with eight youth with disabilities and their families. Gather feedback and satisfaction information.
- E. Evaluate the TAR **telehealth model** for potential statewide access to Transition AHEAD Roundtables.
- F. Establish as a service modality at the Sonoran UCEDD for interested persons around the state. Explore fee-for-service and agency funding to cover costs and embed in service delivery practice.

- G. Disseminate information about the Roundtable through multiple mediums and formats.

## **VI. Staff and Consultant Work**

### **Personnel**

**Wendy Parent-Johnson, Principal Investigator & Project Director (5% FTE)** will be responsible for administrative and fiscal oversight of the proposed project. She will assist with finalization of the Transition Roundtable model and expansion to other sites in the state. Dr. Parent-Johnson will facilitate involvement of community partners and engage stakeholder input contributing to application of the model for individuals in foster care, Native American students, non-English speaking youth, and those living in rural communities. She will promote exploration of sustainable fee-for service and other modalities for on-going sustainability.

**Celina Urquidez, Roundtable Coordinator (40% FTE)** will be responsible for managing and overseeing implementation of the Transition Roundtable, communicating with community partners and local liaisons, and completing pre and post family interviews. Ms. Urquidez will be the point of contact for the youth and families before, during, and after the Roundtable. She will be the virtual event coordinator for the day managing two simultaneous schedules of break rooms, waiting rooms, and gathering youth and family planner responses after each session. Ms. Urquidez will assist with product development and dissemination of clinic results and resources.

**Lorie Sandaine, Transition Specialist (40% FTE)** will be responsible for community outreach and building relationships with local schools and businesses. She will provide training for partners on conducting situational assessments and summarizing/interpreting results. Ms. Sandaine will assist with developing train the trainer activities for site liaisons and strategies for application of the Roundtable to a diverse audience of students and families. She will assume the role of lead on the Roundtable contributing to development and testing of train-the-trainer approaches for expansion. Ms. Sandaine will oversee development of virtual work techniques.

**TBD, Vocational Specialist (20%)** will be responsible for conducting situational assessments, being the in-person on site representative, and maintaining school and business relationships. Two vocational specialists have recently been hired and one will assume this role. The person in this position will serve as mentor to the site liaisons and explore their role in being the local in-person representative for expansion. She/he will assist with training on situational assessments and providing technical assistance for implementation. The person will identify effective strategies for using technology to support distance situational assessments.



## **Consultants**

**Richard Parent-Johnson, PhD, Roundtable Lead, Content Expert, & Trainer** will be responsible for overseeing expansion of pilot test activities focused on developing an Arizona model of the SD TransitionInAction Clinic which he was co-developer of. He will lead development of application to students who are younger, representative of diverse populations, and reside in different geographic areas. Dr. Parent-Johnson will identify effective approaches for training Roundtable leads, exploring a telehealth model utilizing site liaisons, and ensuring fidelity of expansion implementation. He will assist with finalizing the schedule content, reporting templates, and resource development.

## **Subaward with University of South Dakota**

**Emily Meier, MA, Content Expert & Lead Trainer** will be responsible for assisting with developing the Roundtable schedule and session content, tools and resources for implementation, and training and technical assistance strategies for others assuming her role. Ms. Meier led a major component of the SD TransitionInAction Clinic and is the lead for the highly successful and on-going sustainable service. She was instrumental in development of the pilot in year one to adapt to Arizona, diverse participants, and a virtual format due to COVID. She brings expertise in content and training to assist with identifying effective approaches for expansion.

**John Johnson, PhD, Evaluation Consultant** will be responsible for designing and managing data collection efforts focused on assessing Roundtable outcomes and impact. He designed the Roundtable to be built on the construct of supported leadership and oversees operationalizing those elements for participating youth. Dr. Johnson will assist with completing all IRB and site approvals, obtain any informed consents, and ensure security of data storage. He or she will complete data analyses and summarize outcome results. Dr. Johnson was responsible for overseeing data collection and evaluation for the SD TransitionInAction Clinic.

## **VII. Budget**

Wendy Parent-Johnson, Principle Investigator @ 4%

Celina Urquidez, Roundtable Coordinator @ 40%

TBD, Vocational Specialists # 20%

Lorie Sandaine, Transition Specialist @ 40%

*Total Personnel Salary & Fringe = \$73,164*

Travel @ \$445

Interpreters (Spanish, ASL) @ \$2,000

03.09.21

Printing @ \$366

*Total Other = \$2,811*

Consultants (Richard Parent-Johnson) @ \$13,050

USD Subaward (Emily Meier, John Johnson) @ \$19,166

*Total Consultants & Subawards = \$32,216*

**Subtotal = \$109,901**

**Indirects @ \$10,909**

**Total = \$120,000**

**Match = \$40,000**

**APPENDICES to follow.**