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# WASHINGTON BRANCH

# International Labor Office

## Fact Sheet



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### RIGHTS FOR DISABLED PERSONS

The International Labor Organization has taken large strides toward assuring that disabled people around the globe receive their rights and enjoy equality in the workplace.

In 1983 two new ILO instruments were adopted to advance the rights of disabled persons: Vocational Rehabilitation and Employment (Disabled Persons) Convention No.159 and a companion Recommendation No.168. Convention No. 159 has already been ratified unconditionally by 23 ILO member states.

Since the adoption of Recommendation No.99 (1955), concerning vocational rehabilitation of the disabled, significant developments have occurred in the understanding of rehabilitation needs, and the scope of rehabilitation services. Accordingly, Convention No.159, in particular, takes account of the need to ensure equality of opportunity and treatment to all categories of disabled persons, in both rural and urban areas, for employment and integration into the community.

A convention, part of the ILO's code of international labor standards, is similar to an international treaty and is subject to ratification by ILO member countries. When a member ratifies it, that country has made a pledge to bring national legislation into conformity with the convention's provisions. A recommendation, however, does not require ratification and serves as a guideline for national policy in the issue area it concerns.

Together, the three standards adopted by the ILO concerning disabled people and vocational rehabilitation for them, affect a wide range of issues that include:

- Community participation
- Rehabilitation in rural areas
- Training of staff working with the disabled
- Possible contributions to be made by Employers' and Workers Organizations
- Disabled children
- Employment opportunities
- Women and disability
- The cooperation of medical and vocational rehabilitation

The purpose of rehabilitation services was clearly defined in the opening paragraphs of Recommendation No.99:

"Whereas rehabilitation of [disabled] persons is essential in order that they be restored to the fullest possible physical, mental, social, vocational and economic usefulness of which they are capable, and...to meet the employment needs of the individual disabled person and to use manpower resources to the best advantage it is necessary to develop and restore the working ability of disabled persons by combining into one

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**"In the ILO, workers, employers and governments unite as equals to improve living and working standards worldwide."**

continuous and coordinated process medical, psychological, social, educational, vocational guidance, vocational training and placement services, including follow-up."

The ILO continues as a concerned voice taking action for bettering the lives of disabled people and encouraging countries to follow as they set an example for the international society.

In 1988, the People-to-People Committee for the Handicapped in the U.S. awarded ILO the Margaret Pope Walker Memorial Plaque for its work as "a leader in creating global social justice". The ILO's promotion of economic growth and employment and its advisory services to member nations helping them to set up vocational rehabilitation programs of their own are efforts directed to millions in the move toward equal opportunity for disabled workers and workers generally.

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ILO Fact Sheet 12-89



O C D E O E C D

*Member Countries:*

AUSTRALIA  
AUSTRIA  
BELGIUM  
CANADA  
DENMARK  
FINLAND  
FRANCE  
GERMANY  
GREECE  
ICELAND  
IRELAND  
ITALY  
JAPAN  
LUXEMBOURG  
NETHERLANDS  
NEW ZEALAND  
NORWAY  
PORTUGAL  
SPAIN  
SWEDEN  
SWITZERLAND  
TURKEY  
UNITED KINGDOM  
UNITED STATES

*Special Status Country:*

YUGOSLAVIA



The OECD is not a supranational organisation but a place where policy makers can meet and discuss their problems, where governments can compare their points of view and their experience. The secretariat is there to find and point out the way to go, to act as a catalyst. Its role is not academic; nor does it have the authority to impose its ideas. Its power lies in its capacity for intellectual persuasion.

Jean-Claude Paye  
OECD Secretary-General  
September 1985

## ORIGINS AND AIMS

Since 1960, when the Convention of the OECD (Organisation for Economic Cooperation and Development) was signed in Paris, many thousands of ministers, diplomats and specialists have journeyed to the OECD headquarters at the Château de la Muette in the western part of Paris to make their personal and national contributions to the objectives set out by the founding Member nations. The three basic aims, given in Article 1 of the OECD Convention, are:

- To achieve the highest sustainable economic growth and employment and a rising standard of living in Member countries, while maintaining financial stability, and thus contribute to the development of the world economy;
- To contribute to sound economic expansion in Member as well as non-Member countries in the process of economic development;
- To contribute to the expansion of world trade on a multilateral, non-discriminatory basis in accordance with international obligations.

The signatories in 1960 included 18 European countries (1) plus Canada and the United States. Japan, in 1964, was the first country in the Pacific area to join OECD. In the late Sixties, Finland also became a Member, followed at the beginning of the Seventies by Australia and New Zealand, bringing the total to 24 countries. The Commission of the European Communities takes part in OECD work, and Yugoslavia participates in many activities.

The new organisation took over from the OEEC (Organisation for European Economic Cooperation) which had been created in 1948 to rebuild and restructure the economies of Europe, with the help of \$14 billion of United States Marshall Plan aid. Because of the wider geographical representation, the word "Europe" was dropped from the new

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(1) Austria, Belgium, Denmark, France, Germany, Greece, Iceland, Ireland, Italy, Luxembourg, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

organisation's name. Equally significantly, the word "Development" was added: the OECD Convention made clear that the term did not refer just to Member countries but that the latter were committed to co-operating with the developing nations.

OECD inherited a rich legacy of tested and proved working methods. Particularly important was the emphasis that had been placed during the OEEC era on obtaining comprehensive, reliable and comparable economic data from every Member country. Previously, such data had been rare, and its accessibility to other countries even rarer. Moreover, the post-war organisation, OEEC, had instilled among participants from Member countries a common way of thinking about many international economic issues.

At first glance, differences and disparities among Member countries of the OECD may seem quite marked. The United States, for example, has a thousand times as many inhabitants as Iceland. Belgium and Luxembourg rely on exports of goods and services for 60 per cent of their national income, the United States for only 10 per cent. Thirty per cent of the labour force in Greece works on farms as against less than 3 per cent in the United Kingdom. But Member countries are linked by a community of interests, common problems, a commitment to the market economy, a democratic system and – because of their combined economic weight – common responsibilities to the world at large. Reflecting shared views and strong historic ties, the Organisation acts through consensus.

## **FRAMEWORK AND METHODS**

### **The Council and Committees**

The OECD's supreme authority is the Council, in which representatives of all Member countries participate under the chairmanship of the OECD Secretary General. Meetings of the Council are normally attended by each

country's permanent representative, who has the rank of ambassador. The Commission of the European Communities also takes part in these meetings. Once a year, the Council meets at ministerial level, chaired by one Member country, and brings together ministers of foreign affairs, finance, trade and other leaders. Actions are taken concerning the main economic and social issues facing Member countries. These serve as a guide for the Organisation's future work and give it political impetus.

The Council is aided by the Executive Committee, a smaller body of 14 seats, with permanent membership for seven countries (Canada, France, Germany, Italy, Japan, the United States and the United Kingdom) and rotating membership for seven others. It monitors closely the work of the OECD and prepares the meetings of the Council which may call upon it to carry out other special tasks.

In 1972, a new plenary body, the Executive Committee in Special Session, was created so that senior officials in charge of international economic relations in capitals could discuss the various issues dealt with by OECD in an interrelated fashion. This helps bridge the work of the more specialised committees.

Within the OECD are more than 20 other committees plus numerous working parties and expert groups, covering a wide range of subjects, some broad in scope, others technical and highly specialised. Sometimes countries are represented by members of the staff of their permanent missions to the OECD; generally, however, delegates from national administrations – on occasion at ministerial level – travel to Paris for meetings. These experts from capitals become part of a broad international multidisciplinary network.

### **The Secretariat**

An independent corps of experts drawn from the 24 Member countries and from many disciplines, OECD's Secretariat supports the Council and

committees in their work. The Secretary General is assisted by two deputies and a staff of 1,710, of which 530 are professionals. They are organised into specialised directorates and support staff, supplemented by consultants drawn from universities, business, banks and governments.

The various directorates mirror typical government departments (see diagram, page 28), and many group together related responsibilities – financial, fiscal and enterprise affairs; manpower, social affairs, and education; agriculture and fisheries; science, technology and industry. There are also directorates for services like data processing, administration and public information.

With increasing emphasis, OECD encourages the cross-fertilization of work and ideas. Chairmen and experts from one committee may sit in on proceedings of other committees or contribute to their work. This policy has helped OECD to better understand, and to anticipate, the growing links among economic activities and social and technological developments that too often have been treated as separate and almost unrelated issues.

### **The Consultative Bodies**

OECD works closely with industry and the trade unions. A Business and Industry Advisory Committee (BIAC) and a Trade Union Advisory Committee (TUAC) have permanent offices near OECD. Both organisations make their views known on the positions adopted by Member countries.

### **The Consensus Approach**

OECD is not a supranational organisation but a centre for discussion where governments express their points of view, share their experiences and

search for common ground. The Secretariat provides the basis by setting forth the problems and possible remedies. More specifically what the OECD does is:

- To clarify, through quantitative and qualitative analyses, the economic and social problems facing its Member countries;
- To exchange information on how the problems are being approached in each country so that the experience of one can inform the actions of the others;
- To analyze the effectiveness of economic and social policies;
- Through discussion, to make countries aware of the impact of their actions on the others;
- To search for common solutions or strategies.

Within OECD, many of the agreements reached are informal and unpublicised but, if Member countries consider it appropriate, the accord can be embodied in more formal actions provided for in OECD's convention or developed since. Generally, actions are taken unanimously by consensus.

The action might be a binding Decision of the Council. For instance, a 1961 Decision established OECD's Codes of Liberalisation of Capital Movements and of Current Invisible Operations which have provided the framework for efforts by Member countries to reduce restrictions on capital flows and international service-sector activities. In a more recent Decision (1984), governments agreed to control transfrontier movements of hazardous waste.

More often the consensus will be reflected in a Recommendation of OECD's Council. Member countries may also adopt declarations such as the 1976 "Declaration on International Investment and Multinational Enterprises" which includes guidelines addressed to multinational enterprises. The communiqué issued at the end of each Ministerial meeting sets forth agreements reached and is the main way of bringing them to the attention of the public.

## THE HISTORICAL CONTEXT

In retrospect, the 1960s stand out as a growth decade *par excellence*, reaping the benefits of economic integration through rapidly growing trade, the diffusion of the post-war wave of technological innovation, and the transformation of consumption patterns. The OECD had set a 50 per cent growth "target" for the decade, which in fact was substantially exceeded as OECD GNP increased by 70 per cent from 1960 to 1970. During this period, OECD policy discussion focused on the use of monetary and fiscal policies to stabilise aggregate demand at high employment, while balancing growth internationally so as to avoid balance-of-payments disequilibria. An active manpower policy recommended by OECD's Council in 1964 (encouraging, among other things, the geographic and occupational mobility of workers) was seen in the context of overcoming labour shortages rather than as a weapon against unemployment, though it had the potential for both. Inflation rates rarely reached 3 per cent. Energy use was growing at about the same rate as the economy – 5 per cent a year – and, although OECD had an energy and an oil committee from the start, almost no one foresaw an imminent energy crunch. As the decade ended, Member countries were able to broaden their horizons, to go beyond the concept of quantitative growth, to think about improving the quality of life and cleaning up the environment, which had been an unintended victim of the economic progress of the 1960s.

But as the 1970s began, inflationary pressures started to mount; the dollar came increasingly under attack, and finally the fixed exchange-rate system broke down altogether. A boom in raw materials prices culminated in the 1973 oil crisis with its concomitant inflationary and contractionary effects. The combination of sharp recession and high inflation posed a whole range of new problems on which it proved hard to get a grip.

The response was a series of changes in economic analysis and organisational forms within OECD as well as greater interplay between the

various types of actions. As regards macro-economic policies, the dilemma of how to balance inflation control against sustaining demand and employment proved difficult to resolve, and different countries took somewhat different roads. But important elements of international agreement also emerged. On the energy side, the International Energy Agency was set up (see page 19). Member countries adopted a Trade Pledge to avoid protectionist action as a way of dealing with the trade deficits that emerged as the counterpart of the OPEC surpluses.

Economic recovery began in 1976, but the adjustment to the first oil shock was still far from complete when the second energy crisis hit, further increasing oil prices by 150 per cent between 1979 and 1982. In response, a joint strategy for restoring the conditions for sustainable growth was adopted by OECD Ministers. It gave priority to combatting inflation – and inflationary expectations – through the application of non-accommodating fiscal and monetary policies; to strengthening the profitability of investment; and to improving the capacity of economies to adjust by making markets work better. This strategy, followed to varying degrees and in different ways by different countries, undoubtedly helped to prevent the rise in oil prices from triggering a wage-price spiral. By 1981, inflation was coming down in most countries and, by 1985, OECD's economists were able to project an inflation rate of only 4½ per cent for the OECD area as a whole, as against almost 12 per cent in 1980. But it took longer to get OECD economies moving again, and the level of unemployment has remained unacceptably high, especially among young people and especially in Europe. Furthermore, uneven economic recovery has given rise to large external imbalances that threaten the sustainability of recovery.

Reducing unemployment is a central objective for OECD countries. But there is agreement that this cannot be achieved by policies that would re-ignite inflation or inflationary expectations. And, increasingly, unemployment is recognised as a structural problem, one of a complex of such problems facing OECD economies – inflexible labour markets, insuffi-

ciently developed capital markets, and large public sectors which may discourage private initiatives. And these rigidities make it difficult for OECD to respond to such new challenges as the growth of dynamic exporters in the developing world and the appearance of radically new technologies.

How are Member countries of OECD approaching this new generation of problems?

## **MACRO-ECONOMIC POLICIES**

The challenge for macro-economic policy has been two-fold: domestically, to sustain economic expansion without rekindling inflation; internationally, to achieve better balance among countries so as to promote more stable exchange rates.

The former has entailed a considerable broadening of perceptions about the role of monetary and fiscal policies. In addition to the direct demand effects of such policies, attention needs to be paid to the medium-term implications and sustainability of a policy course. Account must also be taken of the interactions between these policies and the responsiveness of the supply side of economies through, for instance, the effects of tax and expenditure policies on economic incentives to save and invest, or of monetary policy on expectations about inflation and resulting effects on interest rates. The latter challenge has entailed a growing emphasis on understanding, and taking into account, the ways in which policies interact internationally and the way they "add up" across countries, either positively, to improve performance everywhere, or negatively in case domestic objectives of policy are frustrated by their international repercussions.

The focus for discussion of these issues is the OECD's Economic Policy Committee where senior economic policy makers from Member countries come together to evaluate overall policy options, to examine and criticize each other's policies and (within obvious limits) to tell each other what they intend to do. The international interactions of policies are a particular concern of Working Party 3 of the Economic Policy Committee, a group with a restricted membership that has particular responsibility for overseeing balance-of-payments and exchange-rate adjustment. OECD's Secretariat provides input into these discussions by presenting analysis of the impacts of macro-economic policies on economic performance, and in particular on the implications of policies in individual countries for the economic performance of other nations and the world economy as a whole. This contribution must be based on solid data and sophisticated forecasting techniques.

### **Data Collection**

The process of collecting, processing and distributing economic data has been refined by the OECD, which has encouraged and assisted Member countries to make the information timely, reliable and compatible. New statistics have been developed such as those on purchasing power parity, which can be used to compare countries' living standards more accurately than other measures.

In the early days, data were provided on paper; now they increasingly come in on magnetic tape and soon will be electronically received and disseminated "on line". Work on an integrated system of electronic reception, collation and publication of data is underway.

OECD also acts as a clearing house for information of a non-quantitative sort. For example, it keeps several inventories – one on measures being taken by governments to prevent or reduce unemployment, one on new trade regulations and one on obstacles to foreign direct investment.

## Forecasting

Many people around the world know the OECD mainly for its economic projections, which are carried out jointly by country experts and specialists on monetary and fiscal policy, wages, prices, currencies and trade. A particular feature of these projections is the emphasis on international consistency, and the Interlink Model developed and maintained by the Economics and Statistics Department is used to assure this. It works in such a way that if, for example, GNP forecasts for Germany are revised upward by 1 per cent, estimates of Dutch exports, and hence its GNP, also increase, by  $\frac{1}{2}$  per cent and  $\frac{1}{4}$  per cent respectively.

But forecasts are ultimately produced by people, not computer models. In what is called "the forecasting round", computer-generated results are tested and refined against expert judgement in an iterative process. It must be noted that there is an inbuilt assumption in OECD forecasting that neither oil prices nor exchange rates will vary and that government policies will remain unchanged over the forecast horizon – 18 months. Indeed a chief purpose of the forecasts is to alert governments to the likely results of their continuing to pursue current policies.

Out of this process comes the bi-annual OECD *Economic Outlook*. This publication presents the economic projections themselves, together with a thorough analysis and assessment of the economic forces underlying these projections, as well as the risks in the situation that could lead to different (better or worse) outcomes. The *Economic Outlook* is issued under the responsibility of the Secretary General; this means that the projections presented are not necessarily the same as those of national authorities. The *Employment Outlook*, published yearly, aims to complement the analyses provided by the *Economic Outlook* by spelling out their employment and labour-market implications in more detail. Short-term forecasts are presented for some key labour-force groups, and particular attention is paid to some important medium-term developments in OECD labour markets.

In a closely related activity, the economic performance and policies of each of the 24 OECD Member countries are assessed and discussed once a year by experts from Member countries in the Economic and Development Review Committee. Specific recommendations are made to the country being examined, in light of the broader policy framework agreed among OECD countries. The bases for these country examinations are review documents prepared by the Secretariat which, after their text has been agreed by the Committee as a whole, are published as the OECD's *Economic Surveys*. Taken together, these country surveys, the *Economic Outlook*, and the *Employment Outlook* provide governments, banks, business, universities, the press, and the general public with a continuous pulse-taking of the OECD and world economies.

## ENCOURAGING STRUCTURAL ADAPTATION

A framework for structural adaptation is provided by what OECD calls "positive adjustment policies". This is shorthand for an economic policy approach that enhances a country's ability to adapt to change by moving its economic resources out of declining industries, occupations and areas into new ones so as to remain competitive and productive. It implies that this be done without resorting to policies that harm its trading partners or bear unduly on the disadvantaged and low-income groups. It also implies a high degree of social consensus between the social partners and in the society more generally.

This basic idea of structural adaptation pervades much of the work of the Organisation. It is as relevant, for instance, to the work of the Agriculture Committee in dealing with problems of agricultural surpluses as to the Industry Committee for its evaluations of structural adjustment in industry. The Economic Policy Committee has a special working party dealing with

these matters and the Manpower and Social Affairs Committee focuses on the labour market aspects. These problems were also the subject of a special conference of OECD Economic and Finance Ministers in February of 1984 entitled Long-term Challenges Facing Governments. Some specific examples of this focus are indicated below.

### **Capital Markets**

Encouraging broader, more effective and more innovative capital markets is another of OECD's principal concerns. One area being looked into is the provision of venture capital which has been a key factor in the creation of new industries in the United States and the United Kingdom but is in an embryonic state elsewhere.

### **Reining in Public Spending**

The increased role of the public sector in the economies of Member countries has come to worry all governments. Within the OECD area, total outlays range from a third of GNP in Japan to two thirds in Sweden. What is called "social expenditure", spending on education, health, pensions, family allowances and unemployment insurance, has been growing most rapidly – much more so than production – with the result that, for the OECD area as a whole, it now accounts for a quarter of GNP as against 14 per cent in 1960. There is a broad consensus that this growth cannot continue. OECD has been examining how such expenditure can be controlled without causing fundamental damage to the social security and support systems that have been so carefully built up by the Western industrialised countries over the last four decades. This means looking at the inner workings of each system and trying to find new, effective and experimental ways to deliver the social services – and to pay for them.

## **Labour Markets**

Recent experience provides dramatic evidence of the difficulties encountered by workers – white as well as blue collar – when confronted with the need to adapt to a changing economic scene. Yet, more effective adaptation in labour markets is essential to restoring high employment and sustained growth. There is thus a need, on the one hand, to promote greater occupational mobility through training, retraining and – for the generations to come – a basic education that stresses the ability to acquire new knowledge rather than specialisation. On the other hand, the task is to favour a more flexible adjustment of employment and wages to changing market conditions and hence new approaches to collective bargaining.

Since its founding, OECD has focused on “human capital” and has considered the upgrading of this “resource” an integral part of its responsibilities. As a result of the work undertaken by its Education Committee and Centre for Educational Research and Innovation, the Organisation has become identified with several now widely accepted notions: that education and training must be continued throughout the course of a person’s life (what is called recurrent education) and that schools must be much more linked to community needs and resources.

But meanwhile, as such approaches are long term, close consideration must be given to other arrangements – adequate unemployment insurance, and perhaps early retirement, a change in working hours, job sharing, exemptions to minimum wage standards or social security payments for young people. OECD’s Manpower and Social Affairs Committee has been exploring both the shorter and the longer-term needs and opportunities, especially as they impinge on young people who now bear the brunt of the unemployment problem. And it operates a programme designed to persuade local officials and community groups to create new businesses and new kinds of jobs.

## **Government Subsidies**

Most governments use subsidies to encourage structural change. In order to ensure that these do indeed contribute to positive adjustment, rather than putting back the day of reckoning, OECD Member countries have adopted guidelines for government aid to structurally weak industries. It should, among other things, be temporary, be linked to plans for effective restructuring, and avoid favouring less efficient producers. Considerable emphasis has been given to making subsidies, especially those that are "off budget", more transparent.

## **Sectoral Policies**

In two sectors, OECD governments have used the Organisation more directly in the adjustment process. A Committee on Steel and a Council Working Party on Shipbuilding provide a framework within which Member countries can work together to encourage structural adaptation in these industries. In this context, very specific discussions on capacity reduction have been undertaken. (2)

## **FIGHTING PROTECTIONISM**

The traditional commitment of OECD countries to free trade, which is incorporated in the Organisation's convention, seemed likely to be eroded by the successive shocks to the monetary and trading system of the 1970s. To combat this tendency, OECD governments, in 1974, made what they called a Trade Pledge in which they agreed not to try to solve their

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(2) The Steel Committee has a liaison committee with Mexico.

balance-of-payments problems with import controls or subsidies. This pledge, after being renewed several times, was followed at the 1980 Ministerial meeting by a "Declaration on Trade Policy" in which Member governments agreed to maintain and improve the open and multilateral trading system and to strengthen the role of the GATT. However, some trade practices that have become common since the oil crisis belong to the so-called grey zone and have not been brought under the GATT (voluntary export restraint agreements, for example). These and other restrictive or distorting measures have been examined by OECD, in accordance with a Ministerial request of 1982, and the Council has urged Member countries to roll back such measures and to refrain from new ones. A study of the costs and benefits of protection has just been completed. At its 1985 Council meeting at ministerial level, ministers "reaffirmed their commitment to the open multilateral trading system and their determination to strengthen it by further liberalisation".

OECD often examines trade issues before they move on to GATT for actual negotiation. Such was the case, for example, with government procurement practices which were included in the Tokyo Round. Now specific issues and sectors (banking, insurance, securities, tourism) related to trade in services are being studied with a view to increasing cooperation among OECD countries in this area.

OECD monitors new trade measures reported to it and has examined the problems involved in trade in high-technology products. Developments in East-West and North-South trade are reviewed and analysed and specific issues in these areas discussed (countertrade, for example).

In their official support of export credits, Member governments have, since 1978, followed a set of guidelines, which grew out of a "gentlemen's agreement" among the seven largest Members of the OECD. The provisions of this "Arrangement" are frequently reviewed in order to adapt them to prevailing market conditions or otherwise to improve their operation. This helps to ensure that individual countries do not generally

offer support for export credits that provide their industries with an unfair competitive advantage and thus distort trade flows.

## **FOREIGN INVESTMENT**

In the 1970s, when controversy over the activities of multinational enterprises intensified, OECD launched consultations with all interested parties, including OECD's business and trade union advisory bodies. In 1976, Member governments, recognising the increased importance in the world economy of international investment and multinational enterprises, adopted a cooperative approach. Such cooperation, it was recognised, can "improve the foreign investment climate, encourage the positive contribution multinational enterprises can make to economic and social progress and minimise and resolve difficulties which may arise from their various operations". They agreed that foreign investors should be granted the same treatment as national firms in similar situations and set up a system for reporting exceptions. At the same time, guidelines were addressed to multinational companies, covering their behaviour on such matters as labour relations, disclosure of information and the transfer of technology. The application of these guidelines are assessed regularly when new problems emerge. Questions about interpretation and scope are brought up in consultations held by OECD's Committee on International Investment and Multinational Enterprises with BIAC and TUAC.

## **ENERGY NEEDS**

The International Energy Agency (IEA) was established by the OECD Council in 1974 as the main energy forum of what are now 21 governments.

(all the OECD countries except Finland, France and Iceland). Its creation was a collective response of major industrialised nations to energy problems, culminating in the oil price shock of the early Seventies.

IEA governments agreed then to share available oil supplies in the event of a severe supply disruption. They also resolved to co-ordinate their energy planning to ensure that demand for energy can always be satisfied at reasonable cost. This quest for both short and long-term energy security remains the IEA's central task.

The IEA has encouraged member countries to conserve energy, to reduce dependence on oil, to develop alternatives to oil – like coal, nuclear power, and renewable energy sources – and to pursue research and development. One measure of the IEA countries' success is that in the Agency's first decade, which was characterised by oil market turbulence and steep price rises, the share of oil in total OECD energy consumption fell to 43 per cent compared with over 52 per cent in 1974.

High prices and resulting economic pressures, as well as government policies, contributed to these improvements. By the mid-1980s energy supplies, and particularly oil, had become more abundant, and the danger of supply crises appeared to have receded.

Warning against complacency, the IEA focused on the longer-term prospect that oil markets are likely to tighten again in the last decade of the century, and on the need to use the breathing space to make lasting improvements in the energy supply-demand structure, as well as to achieve a more balanced energy mix, involving less reliance on oil. Other prominent current issues for the IEA are the effects on energy policy of growing environmental concerns and the problems and opportunities offered by far-reaching structural changes in energy economies.

Nuclear energy, which now accounts for 18 per cent of OECD electricity, has been an important part of OECD's energy planning since the days of OEEC. The Nuclear Energy Agency (NEA), created in 1957, is concerned with all aspects of the nuclear fuel cycle. It makes important contributions

to increasing the safety of this form of energy and to planning for disposal of its wastes. Among other things, it sponsors an experimental project in a mine in Stripa, Sweden, designed to examine how deep geological formations can be used to dispose of radioactive waste. NEA also evaluates the economics of nuclear electricity. Two international conventions for compensating victims in the event of nuclear accidents were adopted, in 1960 and 1963, to harmonize national third-party-liability regimes in Europe.

## **HIGH TECHNOLOGY**

Increasingly, economic growth and competitiveness have come to depend on the application of high technology. Even traditional smokestack industries need it if they are to survive. The promise of such new industries as robotics, semiconductors, computers, software and space can hardly be underestimated. OECD countries have a vigorous R and D effort, ranging in volume from almost 1 per cent of GNP to 2.5 per cent, much of it financed by governments. But R and D alone is not enough. Progress requires innovation, and achieving innovation is no easy matter. OECD's Science and Technology Committee and its Industry Committee are trying to understand the innovation process and find ways to promote it. At the same time, these bodies monitor R and D, innovation and high-tech industries in Member countries.

A special Committee has been formed to deal with information technology. This industry, which revolves around computers and telecommunications, has been called the fourth sector (along with agriculture, industry and the services). It poses some very delicate problems for Member countries, having to do with computer crime, confidentiality and intellectual property rights. OECD Member governments at the 1985 ministerial

meeting made a declaration on transborder data flows in which they agree to promote access to data. These supplement earlier guidelines to protect privacy and safeguard personal data crossing national frontiers.

Other high-tech industries also involve difficult issues: OECD's Science and Technology Committee is examining the dangers posed by the biotechnology industry as it moves from the lab to industrial mass production (and in the case of agricultural uses into the open environment) with a view to making the industry safer. It has also made recommendations about patenting biotechnological inventions.

Across the board, OECD is concerned with the effect of the new technologies on employment – and unemployment: whether office automation will create jobs or destroy them, how workers can be trained for new occupations, how developing countries can be made to profit from the new technologies, how competitive upbidding of government subsidies and consequent trade problems can be prevented.

## THE ENVIRONMENT

Since OECD's Environment Committee was formed in 1970, governments have responded individually with new laws and regulations and through OECD have taken a common position on a number of key issues.

The Council has made specific recommendations and decisions on the economic, legal and scientific aspects of environmental management. The well-known "polluter-pays" principle, originated in OECD, has been accepted by all OECD Member countries as has the concept of "prevention is better than repair".

Since OECD Member countries produce the lion's share of the world's chemicals, the Organisation has proved to be an effective forum for international efforts to deal with the hazards created by these substances.

The Council has approved a system for testing chemicals before they come onto the market and has created standards so that tests made in one Member country will be accepted by the others – a benefit to producer and consumer alike. OECD has also urged its Members to reduce air pollution which leads to acid rain and photochemical smog, among other things, and has been providing Member countries information on the costs of abatement and the benefits in the form of reduced damage.

OECD has also made recommendations or decisions on noise abatement, water management, transfrontier pollution and control of international shipment of hazardous wastes and has developed a series of environmental indicators which include positive marks for prudent management of resources. Recognising the role that cities play in national economies, the OECD created a group on Urban Affairs in 1980. This group is now analyzing innovative policies for urban economic development, provision of urban services, housing finance and land management.

## **AGRICULTURAL PROBLEMS**

In all OECD countries, the agricultural economy is undergoing very rapid structural changes. Nevertheless, agriculture is in many cases a cause of concern to governments because there are serious market imbalances, with supplies exceeding effective demand, rising budgetary costs and increasing trade tensions.

OECD has been chosen as a forum in which these problems, both national and international, are discussed. These discussions allow the various issues to be viewed in the context of overall economic, social and trade policies, as it is evident that agricultural policies can no longer be treated in isolation.

The regular analysis of Member countries' policies and the forecasting of agricultural production, consumption and trade worldwide are essential

tools for assessing impending developments and enabling governments to adopt timely, corrective measures.

The national and international consequences of agricultural protection are well known; they often result in the misuse of resources and tend to aggravate international tensions. OECD has thus been asked to analyze the possibilities for reducing agricultural protection in a balanced and gradual way, to assess the adjustments likely to result and to discuss how to improve the functioning of agricultural markets.

In the case of fisheries, the new regime resulting from the extension to 200 miles of the exclusive economic zones has greatly modified the conditions under which fishing takes place. The Fisheries Committee has been paying particular attention to the need to avoid overfishing, to promote the adjustment of the industry, to further liberalize trade and to provide for better conditions of access to fishery resources.

## **IMPROVING COOPERATION WITH THE DEVELOPING COUNTRIES**

The developing world has become more diverse since OECD and its Development Assistance Committee (DAC) were formed. The very special position of the oil-producing developing countries is the most obvious case in point but not the only one. Some of the newly industrialising countries or NICs and what OECD calls the "second wave" of exporters of manufactures have come up much further and faster than was generally foreseen at that time. But generalisations about NICs, oil exporters, major borrowers and low-income countries have lost much of their significance. What has become most striking is the individuality of developing countries and their varying capacities to master their own economic destinies.

In the wake of the second oil-price shock and the prolonged recession that followed, many developing countries have run into problems of excessive

debt. In analysing the debt problems of these countries, OECD has focussed on the close links between trade and financial flows. For the more advanced developing countries, private investment and greater access to international financial and capital markets are the most appropriate form of external financing. These countries can help by creating a positive investment climate and increasing the efficiency of investment. But if they are to export, they require markets. For OECD countries, restoring growth at home expands the potential market for these countries' exports. But only by resisting protectionist measures can that potential be realised. OECD's responsibilities in this respect have been the object of policy prescriptions embodied in recent ministerial communiqués while the practical aspects of problems on the supply side have been explored by OECD's Trade, International Investment and Multinational Enterprise, and Economic Policy Committees as well as by the DAC.

At the other extreme are the least-developed countries with few resources and a vulnerable ecological balance which, in the case of Sub-Saharan Africa, has been disrupted. OECD has recommended that for these countries, aid in the sense that DAC has traditionally used the word – grants or very low-interest, long-term loans – be stepped up and improved. As to Sub-Saharan Africa, it has, in the words of OECD's Secretary General, "absolute priority need of immediate, generous and extremely varied aid to come through its cruel and unjust trials." Food aid should be provided in parallel with more lasting help in improving the area's own agricultural capabilities and rural facilities. The "Club du Sahel" has been created within OECD, with aid recipients and the OECD countries jointly represented. It has drawn up a plan for the area until the year 2000. The Development Centre of OECD provides a contact point for the developing countries as well as a forum for international exchange of experience; it also does research on problems of development and interdependence.

Despite the years of recession, most DAC countries have kept up their aid flows, in real terms, and several have increased their efforts. Five countries

are now above the aid target of 0.7 per cent of GNP accepted by all DAC Members, and the least-developed countries are now receiving a quarter of total DAC aid.

Although the concept of "global negotiations" has gone out of fashion, dialogue is well established, and discussions between OECD countries and developing countries are held regularly in the UNCTAD, the GATT, the IMF, the World Bank and other international bodies. A North-South Group on Economic issues has been formed within the Organisation to review policy issues in economic relations with developing countries and preparations for international discussions.

## **SOME OTHER CONCERNS**

These main work orientations by no means cover the whole range of OECD activities. Consumer policy is an important one, and OECD reports have examined the various national and international aspects of consumer protection and information, such as product safety and marketing practices. Recently, attention has focused on the effects, direct and indirect, of protectionist measures on consumers, as well as on more specialised matters like the difficulties posed by new electronic banking techniques. Preventing restrictive business practices is of prime importance in a market economy, and OECD constantly reviews Member countries' regulations as well as the effect on competition of specific practices. A recent study examined the delicate questions of whether doctors, lawyers and other professionals should be allowed to advertise and to what extent existing regulations restricting entry into the professions restrain competition.

In tax matters, OECD tries to look at the *real* position of workers, that is how much he or she has left after taxes and social security contributions – and after the payment of family benefits. Another concern is how

individuals and corporations can be prevented from evading taxes or paying twice to different governments. More generally, tax reform efforts are being given increased priority as countries seek to develop tax systems which contribute to strengthening the economic recovery and improving economic efficiency rather than discouraging it.

## **AGENDA FOR THE FUTURE**

The problems of unemployment, structural disequilibria, protectionism, an unsettled world financial system, hunger in Africa, and environmental hazards are likely to be with us for the rest of the decade and even into the Nineties. Moreover, economic policy makers, who have been successful in combatting inflation, will be watching closely to make sure that inflationary expectations do not take hold again.

The new problems that will arise are, of course, impossible to foresee, as has been amply demonstrated in the last decade. But the experience of the Seventies and early Eighties has made analysts in the OECD, as elsewhere, more aware of the probability of improbable events and hence more attuned to catching warning signals and to looking further into the future. And the OECD will continue to rely on what may be its greatest asset: the ability to shift gears, to deal with new problems and to reset the priorities as its Member countries require.

## Principal Bodies

COU

Executive

Executive Committee in Special Session  
Group on North-South Economic Issues

Economic Policy Committee  
Economic and Development Review Committee

Environment Committee

Development Assistance Committee

Development Centre Advisory Board

Technical Cooperation Committee

Trade Committee

Committee on International Investment and Multinational Enterprises

Committee on Capital Movements and Invisible Transactions

Payments Committee

Insurance Committee

Committee on Financial Markets

Committee on Fiscal Affairs

Committee of Experts on Restrictive Business Practices

Committee on Consumer Policy

Maritime Transport Committee

Tourism Committee

*Note:* This diagram does not include working parties

es of the OECD

NCIL

Committee

*International Energy Agency (IEA)*  
*Governing Board*

Committee for Energy Policy

Nuclear Energy Agency (NEA)  
Steering Committee

Committee for Agriculture  
Fisheries Committee

Manpower and Social Affairs Committee  
Education Committee  
Centre for Educational Research and Innovation (CERI) Governing Board

Committee for Scientific and Technological Policy  
Committee for Information, Computer and Communications Policy  
Industry Committee  
Steel Committee

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*Special Control of Chemicals, Local Initiatives for Employment Creation.*

or some other groups which are mentioned in the text.

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Minimum qualifications required are normally a Masters degree or a Doctorate in Economics from a university reputed for its excellence in this field, plus at least three to five years of experience in one of OECD's areas of activity. This experience should normally include policy analysis in a national and/or international context and should ideally have been gained in a national administration, an international organisation or a research department. Good knowledge of quantitative techniques and an ability to use computers are also desirable. Candidates should have an excellent spoken and written command of one of the Organisation's official languages (English and French) and a knowledge of the other. Candidates must be nationals of one of OECD's 24 Member countries (see page 2). Appointments are usually of 2 or 3 years' duration.

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September 1985



## The setting

### International

Since 1978 the Centre for Educational Research and Innovation (CERI), part of the Organisation for Economic Co-operation and Development (OECD), has had a programme of activities concerned with young people with disabilities. It has had two main themes: integration and transition. Transition from school to adult and working life has been the focus of its work since 1982.

### The United Kingdom

The United Kingdom has been involved with the CERI transition programme from the outset: in the early years through contributing to meetings and seminars and, from 1989, more actively through 'Working Together?', a project managed by the Further Education Unit (FEU). This programme of activities has made a very significant contribution to the CERI study.

## The aim of this bulletin

This bulletin, written by John Fish, consultant to the OECD/CERI Programme, presents and discusses important aspects of the transition process. Its particular focus is the contribution of further and adult education - **working together** with students, parents and other agencies - to the process of transition to adult and working life. The transition of individuals whose disabilities or difficulties may require support for learning is central to the studies. The bulletin summarises the UK contribution, sets it in an international context, and looks at the lessons which might be learned from the CERI programme as a whole.

The relevance of contemporary UK reports, such as the CBI study of training needs, *Towards a Skills Revolution*<sup>1</sup>, and the Social Services Inspectorate study, *Day Services for People with Mental Handicap*<sup>2</sup>, are considered, as well as the activities of the Training Agency and the National Council for Vocational Qualifications (NCVQ).

The bulletin concludes with a discussion of national and international issues which professionals, parents, services and institutions should consider. Meeting special needs during the transition from school to an adult and working life demands inter-agency collaboration directed towards agreed objectives supported by appropriate facilities and services.

Transition  
to  
Adult Life  
for people with  
disabilities

## Transition from school to adult life

Individuals make many important transitions in their lives. Entering school, leaving home, moving from institutions to the community and moving from an active life to an elderly disabled one are some of them.

However, the concept of a *process of transition*, and the development of means to support, manage and facilitate the process, are relatively recent phenomena.

The CERI programme concentrated on the transition from school to adult and working life. This transition, important for all, is particularly significant for those with disabilities as it has implications for the quality of their adult life. The activities had two broad themes: the social, psychological and legal aspects of achieving adult status and the educational, training and administrative arrangements necessary for an effective transition<sup>3,4</sup>.

Aims, expectations and objectives for adulthood are set by families influenced by the cultural values, policies and practices in individual countries. Although independent living, work, developing family responsibilities and community participation should be accepted as objectives for all, expectations for those with disabilities may differ.

It is not always clear whether society, families or professionals accept the same transitional objectives for individuals with disabilities and by doing so accord them the possibility of adult status. Certainly those with severe intellectual disabilities are often legally excluded from many responsibilities which epitomise adulthood.

## A framework for transition

A conceptual framework for transition is relatively simple to develop but very difficult to realise in practice.

Transition should be regarded as a unitary process by which an individual grows through adolescence to adulthood and achieves the balanced state of dependence and independence expected of all citizens.

The complex pattern of different definitions of handicap, and of professional and agency responsibilities during transition, presents young people and their families with problems. For many, an effective passage through the phase may be inhibited by a lack of information, divided responsibilities and unclear objectives.

The objectives of transition for the youth group as a whole are not always seen as appropriate for those who are disabled. Professionals often have explicit or implicit reservations about the extent to which individuals with

severe disability might attain the same goals as others.

An important conclusion of the CERI programme is that objectives should be the same for all and that where this much higher expectation exists the objectives are achieved by the vast majority of those with special needs.

The achievement of these objectives may take longer for some individuals and they may require long-term support to sustain them. The handicaps of young people with disabilities should not be increased by preconceptions about the effects of their disabilities on adult life or by placing limitations on their choices and opportunities in the early stages of transition.

## The aims of transition

The aims of the transition process fall into four groups:

- the achievement of personal autonomy, independence and adult status;
- productive activity (i.e. 'working life') leading to economic self-sufficiency;
- equal opportunities for social interaction, community participation, leisure and recreation;
- the development of appropriate roles within the family and of appropriate relationships with others.

Individuals cannot be neatly divided into their health, education, social welfare and employment segments, although administrative arrangements are often based on this assumption. Many programmes still concentrate on one aspect of transition, for example employment or independent living, assuming that other aspects of individual development will take place independently.

## The UK activities

The OECD/CERI programme for 1986-89 included eight specific studies: early intervention, progress towards integration, case management, adult status, new technologies, future employment prospects, individual transition planning and supported employment. Of these, the first two were the subject of separate UK contributions and of other OECD/CERI publications.

The outcomes of the 'Working Together?' programme are being made available, by FEU, in three major studies, two contributory papers and a series of bulletins. Other work associated with the programme, such as the East Midlands Further Education Council (EMFEC) study,

will be published separately. The outcomes will also form part of CERI publications.

## Major findings

The material which follows is a distillation of the major findings of the 'Working Together?' programme:

- the development of adult status;
- new technology;
- preparation and support for employment.

### Adult status

The achievement of adult status was addressed in two studies of self-advocacy: one was part of the 'Working Together?' programme and the other a joint FEU/EMFEC initiative funded by REPLAN. Advocacy was also the subject of a contributory paper about advocacy and self-advocacy for parents of children and young people with special needs.

In this series of studies, advocacy is the presentation of the young person's needs by parents and others and self-advocacy is a necessary adult skill, involving appropriate self-presentation, which young people should acquire through education and experience.

The first study, by Alison Wertheimer, looks at the effects of developing self-advocacy and adulthood in a small number of families where young people with a range of disabilities were making the transition from school to adult life.

A major issue was the relationship of self-advocacy skills to parental and professional goals for adult status. The interviews in the study illustrate how hard it is for disabled young people to achieve adult status when their parents continue to play such a central role in their lives.

One of the most striking findings is the low level of professional involvement with parents during transition.

Where there was involvement, parents thought that being listened to by professionals, being given a sense of equality and being treated as individuals helped, as did continuity of support from the same professionals. Feeling devalued, feeling blamed for a child's problems and not being understood were negative experiences. Similarly unhelpful were the contributions of professionals who were too directive and did not co-operate with other professionals.

The report concludes with recommendations for action by education, social and health services as well as recommendations for professionals and parents.

The EMFEC study, by Mariette Clare, looks at the development of the self-advocacy skills of unemployed young disabled adults. The project officer supported professionals from a range of agencies as they helped individuals to develop personal portfolios.

These portfolios included an individual history, a diary of activities, a profile of skills and a statement of aspirations. Portfolios established a basis for communication, for building up self-advocacy skills and for self-presentation. The confidence generated by young people's ownership of their own experiences is clear.

The outcomes of the study have an impact on a wide range of professional practices. They illustrate how crucial it is that professionals respect the learner and have the same goals of autonomy and employment for all young people. The importance of proper records, particularly when personal portfolios are developed, is stressed.

Workers developing self-advocacy need considerable support in their work with individuals as the workers' objectives are often difficult for colleagues to accept.

The contributory paper by Phillipa Russell is part of work by the Voluntary Council for Handicapped Children directed towards the effective participation of parents and young people in decision making. It is relevant both to advocacy issues and to inter-agency collaboration.

The issues being explored in the project include parents' feelings about transition, existing models of support for the parents of older children, self-advocacy for young people, the improved co-ordination of services for young people and the professional training necessary to provide partnership and support to both parents and young people during transition.

### New technology

A study by Tom Vincent brings together a wide range of experience in the use of technology to support learners with special educational needs or disabilities and lays the basis for a network of those involved in its development. The current use of technology, illuminated by the first-hand experiences of students and the staff who taught them, was the basis of the study. A summary in the FEU *Working Together?* series, *New Technology, Disability and*

*Special Educational Needs*, explores the issue and a full report of the work has been published as a result of a business initiative by a group of young people<sup>5</sup>.

Over 100 people have contributed to the study, including students, college and local education authority staff, social services staff and the staff of specialist centres.

The experiences reported confirm that appropriate technology can:

- provide access to new opportunities in education and employment;
- give increased independence;
- assist with integration into mainstream activities;
- raise self-esteem and self-confidence;
- motivate.

The potential of technology cannot be realised in isolation. New technologies can enable students with disabilities to have a wider choice of courses and curricula and new and enhanced education and employment opportunities, but effective support, in the form of information, advice and technical services, and appropriate training in the use of technology, are necessary for students, their teachers and carers.

However, the survey provided little evidence of evaluation of the matching of new technology to student needs. The complexity of the range of post-school provision, of the differing responsibilities of services and of the needs of individuals requires understanding and then 'facilitation' in dealing with it. The task of 'facilitators' would be to enable students to gain access to adequate information, to advice and to experiences of good practice.

Although it is possible for students to acquire new skills via technology, the opportunity for them to demonstrate those skills during work experience or in employment is less in evidence. Many employers seem unaware of the enabling potential of new technology.

Much progress to date has been the result of *ad hoc* solutions and chance contacts. The absence of any national programme in the post-school sector, or of an information co-ordinating mechanism, has limited what might have been achieved. This needs to change.

The survey suggests that students have made significant contributions to staff development in the area of new technology. Nevertheless, there is a continuing need for training for lecturers and carers if technology is to assist young people with disabilities to the full.

## Preparation and support for transition to employment

Employment is a central feature of adult life for all, and a crucial step for those who are disabled. *Enabled to Work* is a major study of employment possibilities.

The publication also includes a review of education and training opportunities, an example of integrated vocational training for young people who are deaf and a study of the implications of national vocational qualifications for young people with special needs.

The main study, by Matthew Griffiths, reviews the employment situation for young people in the UK. The first section discusses the role of employment in the transition of all young people to adult life and summarises experiences of the additional problems met by those with disabilities. The report goes on to give the perspectives of individuals from agencies concerned with preparation and employment.

There is a traditional three-level concept of employment for those who are disabled: open employment, sheltered employment and diversionary activity. This is now being challenged by the supported employment model.

The report includes descriptions of training and individual case-studies and an important section considers an 'expanded core curriculum'. This would link special needs with those of all young people entering employment. One recommendation is that part of that common core should aim to help young people understand their disability in the context of employment.

Individuals identify points in transition where, in their experience, support or its absence was critical. However, some young people feel that support can often be overprotective and encourage dependence. Support should be flexible, be compatible with an individual's wishes and be phased out in favour of increasing autonomy. There should be a single point of reference for the individual.

Further suggestions include increasing emphasis on:

- developing autonomy in training;
- inter-agency collaboration;
- the development of appropriate models to support transition;
- subsidies for employers in the initial stages of employment.

The report concludes that a thorough exploration of the attainment of adult status is necessary:

'Employment should be a real option ... The primary objective should be to ensure that no form of disability bars anyone from enjoying a normal range of adult experiences including autonomy and responsibility.'

A number of papers which support the main thesis are included in Part 2 of *Enabled to Work*. The pre-vocational and vocational training currently available in England is described by Deborah Cooper, Director of Skill (National Bureau for Students with Disabilities), with particular reference to the needs of young people who are disabled.

A complex pattern of options exists, but it is responding only slowly to the needs of disabled young people.

An initiative concerned with vocational training and job placement for deaf adults is described in a paper by Alistair Kent of RNID and Colin Hickman of Weald College. The paper describes the work of the RNID and in particular its collaboration with a college of FE in the work of a training programme for deaf people which is conducted entirely through signing.

The report summarises the processes involved in this collaboration. The programme is being monitored and evaluated but it is too early to draw conclusions.

The final paper, by Elizabeth McEvoy, describes a two-year project to explore the implications of the NCVQ's developing pattern of qualifications, including equality of opportunity of access to training and qualification.

There will be a move away from qualifications obtained by completing a set course towards certification based on proof of competence to nationally determined standards. New, flexible assessment methods are being considered to allow full certification to be gained over time.

Among the findings to date are the need for greater awareness about the potential of those with disabilities and the need to facilitate their access to training.

A separate contributory paper by Derek Childs describes the support provided by the Open University, in association with other bodies, to students who are disabled. It gives specific examples and concludes that inter-agency co-operation is a particularly important element in the support provided.

### Current considerations

It is significant that approaches to transition, whether concerned with all young people or with those with special needs, agree on a number of points. The CBI

report<sup>1</sup>, the initiatives of NCVQ, the Social Services Inspectorate report<sup>2</sup> and the OECD/CERI study<sup>3</sup> all, in their different ways, see a changing labour market, empowerment of the individual, individual programmes and quality as significant issues.

### Changing labour market

Smaller youth groups will be entering the labour market in the next few years. As a result there is a concern to make best use of new entrants. Improved possibilities for minority groups, including those with disabilities and special needs, may be possible. If transitional arrangements for them are effective and there is support on entry to and while in work, there may be a new opportunity to establish the value of young people with special needs as employees.

### Empowerment

Empowerment, in the form of vouchers or opportunities for choice, is the second common thread. What distinguishes a 'market' approach from a 'special needs' approach is the recognition that preparation to exercise choice is necessary, together with support, both on entry to employment and to sustain it.

### Individual programmes

Whether the objective is a flexible labour force or the assessment of special needs, there is a move away from inclusive courses, categories and 'all or nothing' packages towards individual programmes and personal profiles for all students, not just those with special needs.

### Quality

Quality or standards are major concerns. Whether stress is on the quality of provision, the outcomes of learning programmes or the effective use of resources, the common focus is improved standards. It does not help those with special needs for their lecturers to be exempted from the standards expected of others.

### Common issues

There are a number of issues which are common to national and international contexts.

### Inter-agency planning and collaboration

The UK is not alone in having traditional areas of

responsibility and means of allocating resources which mitigate against joint planning and collaboration. The aims of different national and local government agencies may be incompatible. Responsibility for individuals may be handed from one agency to another or individuals may be left to find their way through a maze of fragmented information and opportunities.

Although it may be difficult to develop mechanisms for effective co-ordination, it is inexcusable for the agencies concerned not to have agreed aims for transition. Even if contributions are not co-ordinated, agencies should work to common ends. This issue can be tackled and young people, their parents and professionals can contribute.

### Assessment

The 1981 Education Act and the 1986 Disabled Persons Act both require assessment at the end of the school period and look to the preparation of a personal programme as the outcome.

Transitional needs can only be met by assessment which both avoids categorisation and looks at *all* the needs of the individual. It is also important to recognise that, for many of those with disabilities, performance in one situation, such as school, is not always a good guide to performance in real living and working situations.

The starting-point of transition, whether special or regular school, may automatically limit the assessed choices offered to individuals. Further and adult education can offer valuable opportunities for individual self-appraisal and for the reassessment for potential.

### Preparation for an adult and working Life

The CBI report is not alone in putting personal values, integrity and personal and interpersonal skills high on its list of work preparation outcomes. Such preparation should not be confined to the achievement of technical skills, important as these are. A proper balance of academic, vocational and personal skills is widely recognised as necessary.

### Time

Time is an important aspect of transition. How much time is an individual allowed? For how long is education and preparation for an adult working life supported? In a number of countries it is recognised that the transition of those with disabilities may take much longer than their

contemporaries so education, training and support is available until the middle 20s.

In other countries, only the able have this amount of time, as they go through higher education, to delay their entry to employment and adult life. If support over time is not available, decreased independence and vocational proficiency result in a long and costly dependent life.

### Supporting empowerment

Professionals and services have to manage the dual, and often conflicting, roles of support and empowerment. Ambivalence in departmental and agency policies and in the aspirations and practices of professionals, together with uncertainty about consumer/client demands, are all factors which work against empowerment. A lack of distinction between disability and handicap, a lack of knowledge about the nature of transitions and uncertainty about goals for those with disabilities all inhibit progress.

Effective transition involves a 'shift in power'. The change, for a professional or parent, from supporting growth and development through childhood to an adult relationship is difficult for many to manage. This is particularly true when the young person's disability involves a significant degree of physical dependency.

### Work with parents

The 'Working Together?' study shows that little professional work with parents is undertaken in the transition phase. Parents have a crucial role to play in preparing their children for an independent adult life. Much work is necessary to develop this role in partnership with professionals. But supporting arrangements for parents and professionals are rarely readily available. Professionals must recognise the importance of parents to effective transition, and policies, planning and training should include work with them.

### Continuity of support

In the UK, as elsewhere, continuity of support for disabled individuals or their families through transition is rare. The development of appropriate mechanisms to initiate and sustain the continuity of support and funding is a problem common to developed societies.

There is a need to provide a single point of reference to young people and their families throughout transition. The 'Kurator' in Denmark is one possible model and the

Advocate another. Further work is needed to ensure an easy, continuous and uncomplicated access to information, advice and support. OECD/CERI will be publishing a study of effective transition management concentrating on the guidance available to individuals as they move from school into adult life.

However, there are also aspects of inter-agency collaboration to develop a progressive and coherent programme for individuals which are emphasised in the DSS report<sup>2</sup> and in TVEI studies. Informal family and community networks are vital. Service systems developed by statutory and voluntary agencies should support, not supplant, such networks.

### The existence of real choices

Those with disabilities should have the same choices as others, but in practice choice is limited. Choices offered are often linked to expectations and objectives. It is vital to avoid stereotyping individuals according to their disability and to ascertain how far real choices exist for those with special needs and the best ways of making those choices available when they do not exist.

### Transfer of training and experience

This issue is a complex mixture of the fragmentation of individual programmes and the extent to which personal confidence and self-esteem, built up by success in one area of personal experience, is instrumental in increasing overall functioning, self-respect and self-presentation in all areas of life. While it is significant for all young people, it is particularly important for those whose achievements may be limited and whose disabilities make readjustment to new situations difficult.

## The role of education

Although transition is a concern of many statutory and voluntary agencies, as well as of many different professionals, it is of primary concern to young people and their families. Because of this, it is important to be clear about the role of education in the process.

It is important to recognise that many people may be contributing to the education of a young person. In addition to lecturers and tutors in post-school education, parents have a significant educational role, as may social workers and carers. Vocational training staff and employment supervisors also have an educative function.

This means that teachers should recognise that educational functions are shared with others. It also implies that all those who have an educational role should:

- work within a curriculum framework with clearly stated aims and objectives;
- develop programmes for individuals within that curriculum framework;
- review and evaluate the delivery of their curriculum.

For example, the care of people with disabilities, particularly severe ones, should include an individual programme to develop and/or sustain personal, social, independence and employment skills.

Increased self-advocacy should be part of the care of people with severe disabilities whatever their age. This 'creative and progressive care' is an important form of education. It is vital if individuals are not to remain expensively dependent.

During transition, education should not be confined to traditional educational institutions. Institutions, and the staff within them, have a contribution to make to education in other settings. Such activities should be an integral part of the response of colleges and institutes to needs in the communities they serve.

Staff, qualified and experienced in meeting special needs, who are skilled in the management of learning and the development of personal programmes, have skills that are now required throughout post-school education. They have much to offer to colleagues in further and adult education and other services and agencies.

There are three major contributions that staff in further and adult education can and should make. They should:

- demonstrate, within colleges and institutes, the highest quality of curriculum development, individual programming, review and evaluation procedures. Teachers with responsibility for students with special needs should have well-developed skills in the management of learning, as well as an understanding of special needs, which permeate the whole work place;
- work closely with other services and agencies to agree aims for transition and to deliver programmes to achieve those aims;
- help the other important post-school educators develop their curricula, their individual programming and their methods of assessment and evaluation.

## Effective transition

The bulletin describes many factors which may facilitate or hinder effective transition and inter-agency collaboration. There is, however, a major perceptual and attitudinal factor which affects all involved and which is crucial to future progress. This is *economic attitude* to disability. Much depends on whether resources devoted to those with special needs are assessed on short-term grounds, with their necessity questioned, or whether resources are recognised as an investment leading to a saving in the costs of lifelong dependence.

There is now evidence, from studies in Sweden and the USA, that any money earned by those who are disabled from supported or subsidised employment is a net gain for the exchequer. Supported independent living also provides a better quality of life at less cost to the taxpayer than pensions and dependent care for life.

Much needs to be done at national and local level to show that investment in effective transition is of long-term benefit both to the individual and to the economy.

## Conclusion

The most significant contribution to effective transition involves a *positive and creative approach to legislation and regulation*. It is possible to see new legislation and regulation in a number of ways. Research shows that implementation varies widely, even where the limits to possible variation are narrowly defined. Good practice emerges from a positive interpretation of the statutory framework associated with a will to make it work for those with special needs. It involves effective joint planning, positive assessment and the development of individual transition plans.

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5. *New Technology, Disability and Special Educational Needs: Some Case-Studies*, Vincent, A.T. (ed), Empathy Ltd., Hereward College, 1989.

Relevant FEU publications include:

*Working Together?* a series of studies carried out for the OECD/CERI Disabled Action Programme (1989)

Three major studies:

*New Technology, Disability and Special Educational Needs*

*Enabled to Work: Support into Employment for Young People with Disabilities*

*Self-Advocacy and Parents: The Impact of Self-Advocacy on the Parents of Young People with Disabilities*

Two contributory papers:

*Access to Higher Education: Students with Disabilities at the Open University*

*Self-Advocacy and Advocacy for Parents of Young People with Disabilities and Special Needs*

A series of three bulletins (of which this is the third) describing the inception, progress and outcomes of the Programme.

*New Directions* A curriculum framework for students with severe learning difficulties (1988)

*Transition to Adulthood* A curriculum framework for students with severe physical disabilities (1986)

To be published later in 1990:

*Developing Self-Advocacy Skills* - final report of FEU/REPLAN funded project managed by EMFEC.

For further information about the 'Working Together?' initiative and follow-up activities, or other aspects of FEU's work on special needs, please contact Pat Hood, FEU, 2 Orange Street, London WC2H 7WE (tel: 01-321 0433 ext. 261).

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**ACTIVE LIFE  
FOR YOUNG PEOPLE  
WITH DISABILITIES**



PARIS 1987

*Centre for Educational Research and Innovation (CERI)*

**ACTIVE LIFE  
FOR YOUNG PEOPLE  
WITH DISABILITIES**

An International Conference  
Held in Paris on 11th and 12th December 1986

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ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

Pursuant to article 1 of the Convention signed in Paris on 14th December, 1960, and which came into force on 30th September, 1961, the Organisation for Economic Co-operation and Development (OECD) shall promote policies designed:

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## UNE VIE ACTIVE POUR LES ADOLESCENTS HANDICAPÉS

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2, rue André-Pascal, 75775 PARIS CEDEX 16, France.

This report represents the conclusions of a Conference held in Paris on 11th and 12th December 1986. The Conference reviewed policies and practices for young people with disabilities in three countries: Australia, France and Sweden. It was the culmination of seven years' work by CERI on the subject of disability and covered both integration in school and transition to adult and working life.

Earlier publications by CERI (listed overleaf) were relevant to the discussions at the Conference, which involved not only professionals but those at high level in OECD Member countries, responsible for formulating and influencing policies in the educational, social welfare and employment fields.

This report has been written by Mr. John Fish, Consultant to CERI, with assistance from Mr. Martin Gerry (United States), Dr. Enrico Montobbio (Italy), and the Secretariat.

The report is published on the responsibility of the Secretary General of the OECD but the views expressed are those of the authors and do not commit either the Organisation or the national authorities concerned.

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## TABLE OF CONTENTS

INTRODUCTION . . . . .	7
<i>Part I</i>	
DIFFERENT SETTINGS AND COMMON CONCERNS . . . . .	9
The Selection of Topics . . . . .	9
The Starting Point . . . . .	9
Aspects of Integration in the School Years . . . . .	10
The Process of Transition to Adult and Working Life . . . . .	12
Employment, Sheltered Employment and Alternatives . . . . .	14
Decentralisation, Local Responsibility and Equity . . . . .	15
The Development of Social Policy . . . . .	16
<i>Part II</i>	
CONFERENCE COMMENTS AND CONCLUSIONS . . . . .	19
The Opening Session . . . . .	19
Session Two: Integration . . . . .	22
Session Three: Transition to Adult and Working Life . . . . .	23
Session Four: Implications for Future Policies . . . . .	25
POSTSCRIPT . . . . .	27

## INTRODUCTION

A high level Conference was held in Paris on 11th and 12th December 1986. Its purpose was to discuss policies and practices relevant to the needs of children and young people with disabilities and it had two main themes: integration and transition to adult life. The Conference was attended by ministers and senior representatives from 21 Member countries.

It had become increasingly clear, in OECD/CERI work in the field of disability that educational and other facilities and services for children and young people, described as handicapped, could no longer be isolated from similar facilities and services for all children and young people. The means of mitigating the handicapping effects of disabilities and difficulties are now an integral part of all educational and social policies and practices. It is for these reasons that it was decided to review policies in three Member countries and to involve senior political and administrative personnel from all Member countries in a major conference.

It was considered important at this stage to go beyond discussion with professionals in the field of disability and involve those who are responsible for determining the life chances of persons with disabilities in the context of the educational, health, social welfare and employment systems created for all citizens.

In order to provide background information in depth, three countries, Australia, France and Sweden, agreed to participate in the review which had two main themes: integration and transition to adult and working life. Each country prepared a national report supported by other documentation. A team organised by CERI then visited each country to look at facilities and hold a series of discussions at all levels. A general report commenting on each country and discussing common issues was then prepared by a rapporteur general, assisted by other members of the visiting teams. It is not intended to repeat at length what is in those reports, which are available. However, a summary of important common elements is an essential background to the understanding of the Conference discussion.

The report which follows is in two sections: the first is the analysis of common issues, arising from the material gathered in the three countries; the second part is a summary of the main proceedings of the Conference.

## *Part I*

### **DIFFERENT SETTINGS AND COMMON CONCERNS**

It is the different geographical circumstances, cultural heritages and social traditions of individual countries which first attract attention. What could be of common concern to a Scandinavian, an antipodean and a continental European country? It is a strength of the OECD/CERI activities in the field of young people who are handicapped that this question is seldom asked. Although it is relatively easy to minimise the importance of common issues when national interests are paramount, meeting the needs of young people with disabilities represents acceptable common ground.

Although political policies may vary and countries may differ in their approach to economic and social issues, there is a strong communality of interest in determining how best to help young people with disabilities to take full advantage of education and training in order to contribute and participate in their local communities as young adults. While solutions to problems may not profitably be transposed from culture to culture, clarification of the problems themselves and the identification of major factors together with different lines of approach to them, can be a very positive result of international co-operation.

#### **The Selection of Topics**

In order to provide a focus for productive international discussion, six main themes were selected. These are:

- i) Policies, responsibilities and practices in the pre-compulsory school years;
- ii) Aspects of integration in the school years;
- iii) The process of transition to adult and working life for individuals with disabilities;
- iv) Employment, sheltered employment and alternatives;
- v) Decentralisation, local responsibilities and equity issues;
- vi) How a social policy for all children and young people, which includes the needs of those with disabilities, is developed.

#### **The Starting Point**

It is now recognised that parental responses to the knowledge that their child has a disability may be crucial in determining the degree to which the disability may be handicapping. How professionals in the health service handle this difficult situation is also

very important so that parents are helped to come to terms with their emotions and changed aspirations and to begin to contribute constructively to their child's development. A partnership with professionals should follow, together with a systematic programme of activities, to minimise the handicapping effects of disabilities. There is evidence that parents involved in such early programmes become more confident and are able to be more positive in their relationships with professionals and administrators. At the same time, a child's response to an effective programme often increases the possibility of successful integration in regular schools. It is for these reasons that responsibilities, policies and practices for the pre-compulsory school period are so important.

The major concern is the legal and administrative responsibility. For example, in Sweden and certain States in Australia, all pre-school facilities are the responsibility of ministries and departments of Social Welfare or Community Services. In France, pre-school provision is the responsibility of the Ministry of Education except for young children with severe disabilities, which is made in the health sector. At the same time, paediatric services with associated therapeutic services have a significant influence on parental expectations without always being sensitive to the contribution of early education programmes. The social welfare or community services may themselves be committed to a fairly strong non-directive pattern of childcare in which individual children are expected to take what they need from a rich environment without systematic adult mediation. The balance between very general childcare needs and the very specific needs of some children with particular disabilities may be tilted away from systematic programmes.

A policy of integration in the pre-school period, which provides the potential for social interaction in nursery groups of all kinds, is to be strongly supported. Children with disabilities who attend such facilities either as individuals or in groups have much to gain as have their contemporaries. However, to be really effective, such arrangements need to include specific programmes for individuals with particular disabilities to develop the skills and knowledge which will enable them to profit from education in regular primary schools. Simple exposure in pre-school facilities is not sufficient.

Continuity of advice, approach and programmes between pre-school and compulsory school services are vital. However, different departmental and agency responsibilities and the pattern of administrative arrangements often result in discontinuities with insufficient attention to systematic early education programmes in the pre-school period and a lack of knowledge of what to build on the part of schools and staffs once the compulsory school period begins.

Thus, from the earliest years, policies for young children with actual or potential disabilities need to be an integral part of policies for all children and not separate from them. At the same time, policies for health care, social welfare and pre-school education for all young children have to recognise specific needs and the value of early intervention programmes and not simply rely on a uniform pattern of facilities and services for all children to meet such specific needs.

### **Aspects of Integration in the School Years**

Separate facilities or integrative arrangements in regular schools are alternatives which are the subject of continuing discussion. There appear to be four main issues during the compulsory school years, namely, responsibility for the education of all children, to what extent separate special school provision should continue to be made, parental choice during the compulsory school years and the secondary school curriculum.

The three countries illustrate different approaches to the responsibility issue when providing for children and young people with intellectual disabilities. In France, primary responsibility for disabilities which are severe and profound remains with health and social welfare services. In Sweden, similar responsibilities are assumed by county social welfare services and in new legislation by municipalities. However, whereas in Sweden almost all of the provision for such children is made within regular elementary and secondary schools in collaboration with education authorities, in France only limited moves towards individual and group integrative arrangements in regular schools are being made by health authorities. Most provision is in separate institutions.

The situation in Australia is complicated by slightly different legislation in each state. The Commonwealth operates within relatively limited boundaries negotiated with states. While all children are entitled to education provided by public services or paid for by the Commonwealth in non-government schools, in practice much provision for children with intellectual disabilities is made in separate special schools or health and social welfare institutions. However, within some states, a very active policy of integration is being pursued.

With regard to marked degrees of intellectual impairment, two questions need to be considered. The first is, should the education of all children, however severe and complex their disabilities, be the responsibility of education authorities? In some Member countries this is the case while in others it is not. The three countries illustrate different responses to the question. Secondly, does the separation of responsibilities for educating children with different kinds and degrees of disability inhibit progress towards integrative arrangements? It would appear that separate responsibilities for the education of children with intellectual disabilities may limit progress towards integrative solutions and perhaps limit the strength of national, regional and local commitments to an education service for all children.

In almost all countries, children and young people with psychiatric disorders resulting in unacceptable behaviour, children with severe emotional and behaviour difficulties and those whose behaviour involves recurrent delinquency, are not usually educated in regular schools. But with some disabilities, marked differences between countries exist. For example in Sweden, children and young people with severe degrees of hearing impairment attend special schools and training institutions in one part of the country, while in many departments in France provision is made in regular schools.

However, there is little agreement about the limits placed on provision within regular schools for types and degrees of disability other than serious behaviour manifestations. Much depends on local attitudes, policies and practices, even where there is a general national commitment to integration. Resources and staff competency in regular schools are most often cited as limiting factors. But, a significant aspect of the study of the three countries is the confusion, inconsistency and marked local variation in which children and young people with disabilities could and should be educated in regular schools. While delegated powers account for some of the variation, could a lack of commitment by education, health and social welfare ministries to a common set of objectives be the major factor?

Another factor influencing progress towards integration in Australia and France is the extent of educational provision in non-governmental schools. These schools, which include both regular and special schools, are run by independent groups such as religious authorities, charities and parents and they receive substantial public financial support. Where non-government schools provide an alternative to the public education system, a number of questions arise. Do such schools make provision for children and young people with disabilities or do they rely on the public system to do so? Do they have integrative approaches compatible with the public system in the same area? A particular example of inconsistency occurs when,

on the one hand, public finance is supporting separate non-government special schools while, on the other hand, devoting resources to developing facilities and services within regular schools.

The issue of parental choice appears to bring further uncertainty into already equivocal integration policies. If there is to be a genuine choice between provision with regular schools and provision in special schools, there needs to be an equivalence in quality of provision in both separate and integrated facilities. This is not always the case, but the education authority is expected to maintain two expensive competing systems of meeting special educational needs. It is uncertain how far parental choice is a genuine democratic approach or yet another way of avoiding a decision about integration within the education system.

For a variety of reasons, more progress has been made in educating children with disabilities in the elementary schools than in secondary schools. Factors which favour such progress in the early phases of education are the nature of teacher preparations (where concern for children has equal, if not more, emphasis than academic excellence in one curriculum subject), the management of children's learning by a single teacher and the narrower range of individual differences in the early years of schooling. There was evidence of considerable attention to arrangements in regular elementary schools and a recognition by such schools of their responsibilities for the education of all children.

Secondary schools appear to have been less able to contribute to progress towards integration. Their curriculum, organisation and objectives remain closely tied to the demands of higher education. The single subject approach makes it difficult for any one teacher to know how an individual is responding to his or her education as a whole. There is a major question to be considered before discussing integration in this phase. What kind of secondary curriculum best prepares the school population as a whole to become contributing citizens through employment, social participation and responsible family life as well as serving the narrower demands of higher education? The responses to this question have a profound influence on the access of young people with disabilities to secondary education and the same range of options as their contemporaries.

Two approaches to integration in secondary schools have been evident, very positive initiatives to support individuals and groups within schools and an active reconsideration of the school curriculum. The first approach has been pursued in the absence of the second where, for example, services support individuals with disabilities and enable them to follow a traditional academic curriculum. For able individuals with a single physical or sensory disability, such approaches have been successful. Both approaches are, however, necessary, since the traditional academic curriculum not only does not meet the needs of many pupils with disabilities, but it does not meet the needs of a significant percentage of secondary pupils without them. It is during the secondary school stage that standards of performance, a current preoccupation in many countries, become significant determinants of future options. The question to be asked is what standards are being expected? If these are broadly based and apply to the quality of the education provided for the whole secondary school population, there will be less marginalisation of less successful learners. A significant question to emerge from the review is how can secondary schools adapt their curriculum, methods and objectives to provide a more receptive context for young people with disabilities to receive appropriate education of similar quality to their contemporaries?

## **The Process of Transition to Adult and Working Life**

Three interrelated aspects of transition may be distinguished, namely the individual, the service delivery and the social and economic policy aspects. The first of these refers to the ways

in which individual transition programmes are developed, within the range of facilities, programmes and services on offer, and the degree to which a recognised adult status is achieved through the individual programme. The service delivery aspect is exemplified by the ways in which different departments and agencies provide services for individuals who are disabled during the transition phase. In particular, do they recognise an emerging independence and adult status in their *modus operandi*? Finally, explicitly or implicitly, national, regional and local economic and social policies can be seen to influence transition by either encouraging autonomy, useful work and participation in the community, or endorsing a passive and dependent status for young adults who are disabled. Is it financially advantageous to be a relatively passive pensioner?

The starting point for transition gave rise to two particular issues during the review, the length of schooling and the effect of being outside the school system prior to transition. Although the end of the compulsory school period is approximately the same (15 or 16 years), stopping on rates and entry to further and continuing education for all young people and those with disabilities vary widely. The high percentage of attendance in upper secondary schools in Sweden probably accounts for the fact that the Board of Education is responsible for all provision, including alternatives to school up to the age of 18. Many young people with disabilities, including marked intellectual disabilities, receive full time education up to their early twenties. In other countries, the transition process from school has to start at 16 and may have to be completed, in respect of training schemes, by 17 or 18 years of age. More time is available in the education system to prepare for transition in some countries than in others and, by implication, more competence is expected at an earlier age in some countries than in others. Are these differences directly related to subsequent adult competence?

The effect of being outside the education system at the beginning of the transition process may also influence expectations, programmes and outcomes. In France and Sweden, for example, individuals with marked degrees of intellectual disability become the responsibility of the health or social welfare sector from an early age. Does the sector with responsibility for a particular disability influence the extent to which vocational preparation, vocational experience, open employment and independent living are considered realistic expectations?

The relationship of schemes for all young people to more specific programmes for young people with disabilities is often confused, mainly because they are planned and administered by different agencies. An increasing number of training programmes have been set up for all young people leaving school who do not proceed to higher education or employment. Their aim is to create a more skilled work force and delay entry to a shrinking labour market. Some places on most programmes are intended for young people who are disadvantaged or disabled. It is not yet clear how many individuals, with what degrees of disability, have been accepted in programmes available to all young people, nor how appropriately such programmes meet their needs.

It is evident from the previous discussion that individual comprehensive transition plans, developed through inter-professional patterns of work, are not yet common. Different sectors, such as further education, employment and social welfare, tend to carry out their own assessments to determine eligibility for what they have to offer. A co-ordinated approach is not common. The Commission technique d'orientation et de reclassement professionnel (COTOREP) in France is one solution. Experiments in Sweden to have a liaison person to help young people with physical disabilities receive the help they need appears to have been successful as do career officers specialising in finding work for individuals with specific disabilities.

Individuals and their families are still often left to seek information and identify the facilities and services which might help them. Co-ordination of services for individuals and

their families after the school period is not a common feature of the transition phase. Two major questions arise in almost all countries. What sort of co-ordination procedures are necessary to enable the existing range of facilities and services to be used most effectively? What sort of case management arrangements will enable individuals who are disabled and their families to choose appropriate and continuing services within a comprehensive transition programme?

## **Employment, Sheltered Employment and Alternatives**

Paid open employment remains one of the most significant indicators of adult status in developed countries. It is an even more critical manifestation of competence and independence for young people who are disabled. Even in periods of high youth unemployment, there is a strong drive for an equitable share of job opportunities. This is increasingly being recognised in economic, social and employment policies where an ability to maintain a degree of productive capacity, albeit supplemented by social security payments, is not only better for the individual's self image, but also a significant economy measure.

Given that employment is an objective, it is interesting to note how often vocational preparation and training for young people with disabilities is not the responsibility of departments of labour or employment and what criteria are used when it is. In Sweden, those with intellectual disabilities remain the responsibility of the special service for them. In Australia, most work preparation programmes and centres for young people with disabilities are the responsibility of Community Services. In part, current practices result from the initial steps towards employment being taken by voluntary associations whose natural source of funding is social welfare. In part, they result from decisions about employability being taken before entry to programmes rather than as a result of responses to them. There remains the significant question of how far the employment or labour sectors at national, regional and local level should be responsible for the vocational preparation of all young people, including those with disabilities?

One specific issue is the contribution of sheltered workshops to the employment of young people with disabilities. The objective set for such workshops is often commercial competitiveness. The commercial objective appears to have two consequences. The flow of workers to open employment is limited to a small percentage and there is a tendency to recruit disadvantaged and slightly disabled individuals. Currently, sheltered workshops do not appear to be offering many opportunities for young people with significant disabilities when they leave school. Indeed, it may be easier to find supported open employment in some areas.

The most common alternative to open or sheltered work is some form of day activity centre. Traditionally, the programmes of such centres have been largely diversionary. However, it is evident that many centres are developing a new sense of purpose and activities now include community based work. Individuals participate in decision-making and in social and recreational activities with others. Some programmes lead to a small number of individuals entering open employment.

An important option for the school leaver is the invalidity pension. Its award assumes a significant degree of disability and, in some cases, an inability to be employed. The possibility of having such a pension on leaving school is said to be a disincentive to involvement in an active transition programme. Decisions taken at the time of leaving school are predictive and can only be based on school performance without experience of vocational training, work or independent living programmes. Much discussion in Sweden has centered on the need for

transitional financing such as a training allowance for a period, say three years, before a pension for life is granted. The issue is, however, a general one. What forms of financial support are necessary to enable an individual to follow a comprehensive transition programme and how long should these financial arrangements be made before a long-term disability or invalidity pension is awarded?

The most important consideration which affects the transition of all young people to adult and working life is how to develop new relationships between departments and agencies responsible for employment and those responsible for unemployment, disability and other benefits or pensions. In some cases, one department of government may unwittingly be working in a different direction to another. Acceptable alternatives to traditional forms of employment, which give the individual a sense of worth, need to be found. It is partly a question of recognising a continuum of options and developing the available range on that continuum and it is partly a question of looking at the current distribution of responsibilities. Above all, it is a question of not only recognising the rights of individuals with disabilities to the same life opportunities as others but providing the means by which they can be in a position to take those opportunities. In considering employment and acceptable alternatives for all young people in a changing labour market, how can meeting the particular needs and aspirations of those who are disabled become an integral part of that consideration?

### **Decentralisation, Local Responsibility and Equity**

There have been changes devolving decision-making to regions, municipalities and local authorities in all three countries. Decentralisation has involved both delegation to elected local authorities and to administrators and professionals. A number of reasons have been given for these changes, such as increased local democracy, greater sensitivity to local conditions and the better management of resources. The trend appears, however, to have been stimulated by a general lack of confidence in the efficacy of national policy decisions and programmes for such major problems as unemployment and a hope that local initiatives may be more effective. This general trend raises a number of significant issues about facilities and services for individuals who may be disadvantaged or disabled.

The situation in Sweden illustrates a general point. Since 1980, there has been new social legislation delegating responsibilities to municipalities at the same time as providing them with block grant finance for all their services. At a time of financial restraint, this has led to variations in provision and services from authority to authority. By the time further legislation was enacted, to come into force in 1986, safeguards had been built in. These were in the form of requirements that local authorities provide five types of facility for individuals with intellectual disabilities. On the positive side, there is increased local democratic decision-making. However, there is also a less well recognised move from national policies based on a "services for all" concept to local policies involving a "rights model". The traditional patterns of social services for all, including individuals considered handicapped, presents major problems in times of economic restraint; these difficulties are no less evident at local authority level. But the introduction of rights for one disability group is initiating a pressure for rights for others and it is not clear where a line could or should be drawn were all groups to have similar political influence or pursued their cases in law. Thus, the question of whether policies and practices for young people with disabilities should be within a "services for all" approach or through safeguarding the rights of particular minority groups is a significant one.

The means of ensuring that funds allocated by central government to state, regional and local governments are used to implement national priorities and policies is a second issue. The

block grants to municipalities in Sweden, the allocation of funds to states in Australia and regional responsibilities as well as departmental administrative ones in France all reflect the same problem of ensuring that decision-making at local level is in line with national intentions.

From the point of view of individuals with disabilities and the voluntary organisations which represent their interests, this decentralisation of funding presents particular difficulties. National organisations which have achieved an effective working partnership with government departments have to try to achieve an equally effective partnership at local level. The legal system in each country requires that individuals take action to ensure the implementation of laws and regulations and without "class actions", as in the United States, there is little use of the legal system to ensure appropriate service delivery. The significant question is what measures need to be introduced, where responsibilities and funds are delegated within general frameworks, to ensure an equity in provision and services for individuals who are handicapped?

Where criteria for social programmes, invalidity pensions and other benefits are centrally determined and where educational, social welfare and health facilities and services are allocated at regional or local authority level, it is difficult for a co-ordinated and coherent system of case management to take place. From the point of view of individuals and their families and of voluntary organisations, inconsistencies and breaks in continuity occur. Is it advantageous having a local point of service delivery if the approaches and practices of national, regional and local services are not consistent? This is a specific aspect of the more general equity issue already discussed.

## **The Development of Social Policy**

It seems reasonable to conclude that, whatever the political philosophy and broad stance that is taken over social issues, social policies for those who are disabled tend to result in a far from coherent set of practices. Sometimes different sectors could be seen to operate at cross purposes as, for example, where education and labour departments might be pursuing the objectives of maximising autonomy and economic self sufficiency while at the same time social security agencies might be providing pensions and services on the basis of an individual's total economic dependency. Two unrelated approaches are usually taken to policy development. On the one hand, there is a relatively late attention to tidying up general policies for all so that they do not exclude or prove more handicapping for individuals with disabilities and on the other hand, a set of initiatives, often disability specific, which, though intended to normalize individual lifestyles, nevertheless by their existence create separation and a "handicapped" identity. Such coherent social policy as there is seldom appears to include those with disabilities as an integral part of the population as a whole.

Messages to individuals are seldom clear. Should they strive, as many seek to, to be contributing and participating members of their communities or are they expected to be the dependent objects of charity? What is the extent to which individuals considered to be handicapped have the opportunity to make crucial decisions about the service and lifestyle appropriate for them? Either the range of available choices is more limited than for others, or social, economic and personal objectives are determined, implicitly or explicitly, by government departments for those deemed to be handicapped. Disability and handicap are often treated as synonymous concepts. Planning assumes homogeneous categories of handicap rather than a varied individual response to the same disability and thus to its handicapping effects. Choice and expectation are limited as a result and adult status is neither

expected nor accorded. Packages of measures for groups defined by degree of disability allow little flexibility to respond to continued individual development, increased autonomy and potential economic self sufficiency, all of which are now known to be possible given time, opportunity and clear objectives.

Major considerations, including decentralised policy and decisionmaking, the co-ordination of services and individual case management, have already been discussed. One aspect that has not is the allocation of resources at national, regional and local level to different departments and agencies of government and voluntary organisations. On what basis are decisions reached about the resource needs of those who are disabled? How much say do such individuals have in determining their needs? Above all, are resources always to be channelled through institutions and professions or are they made available to individuals as they achieve adult status to choose and/or pay for the services they need depending on the kind of economy in which they live. The final and most significant issue is how to develop a coherent social policy for individuals with disabilities which minimises the handicapping effects of those disabilities and enables individuals to live the same quality of adult life as fellow citizens.

The summary of reports in Part I introduced discussion at the Conference. It served as a brief recapitulation of issues raised in the substantive country and general reports made available.

## *Part II*

# CONFERENCE COMMENTS AND CONCLUSIONS

Mr. E. Kenny, Minister of Education in Ireland, was installed as Conference Chairman. The first of the four main Conference sessions was opened by the Deputy Secretary General of the OECD, Mr. Vinde. The first session began with statements from the ministers present and concluded with a general debate to which many participants contributed. The second session concentrated on the theme of integration and the third on the theme of transition. The final session was devoted to a consideration of possible ways forward in the development of social policies which integrate the needs and aspirations of those who are disabled.

The six ministers from Australia, Sweden, France, Norway, Ireland and Portugal, together with the three experts and members of the Secretariat, acted as a steering committee. During the meetings between sessions, the group discussed trends and helped to formulate the agenda for the final session.

### **The Opening Session**

The Deputy Secretary General, opening the Conference, reviewed the work of CERI in the field of disability and handicap since 1978. He drew attention to the changed definition of handicap as a social construct, to the changing pattern of work and its importance to the disabled and the crucial significance of high expectations. It is not enough to say that there are equal opportunities. We must provide the means for making those opportunities real.

Mr. Bengt Lindqvist, Swedish Minister for Family, the Elderly and the Handicapped, then made a keynote statement which did much to set the tone and quality of the subsequent discussions. He drew attention to two recent OECD events: the 25th Anniversary Symposium, and the meeting of ministers of Labour. New technologies, particularly information technology, are creating revolutionary changes which will be felt by all in society. There are risks that these developments will be negative for groups in society who do not have access to the new technology. There is also the risk that high unemployment rates will marginalise large groups in society. To allow this to happen would lead to a moral erosion of our societies. From this perspective, disabled people are particularly vulnerable. There is no reason for defeatism since the new technologies can open up new opportunities, and better education for all may be a decisive factor in equalising those opportunities.

Deregulation, the development of local decision making and privatisation seem to be tendencies occurring in most countries. There is a growing awareness that this will affect the situation of groups with weak or very special positions in society. The issue of establishing a balance between decentralised responsibilities and national safeguards is one of the most crucial.

For a dynamic discussion of the problems of people who are disabled, it is necessary to distinguish between the disability itself and the problems that are created around those who have it. Handicap occurs when disabled people encounter physical, cultural or social barriers which prevent their access to various societal networks. Another way of putting it is that handicap is the loss of opportunity to take part in our communities on an equal basis.

Developing integrated education was a matter of concern to all three countries and involved breaking down prejudice and restructuring resources. We should not attempt to establish any limit to the process of integration. If we had done so some years ago, we would not have thought possible many of today's practices.

He said more attention should be paid to the social and psychological situation of disabled youth. We should recognise that everyone has the right to work and the goal for those with disabilities is work, not pensions. To achieve this, it is necessary to provide support measures for transition, job orientation, job counselling and efficient work adjustment as well as tackling co-ordination problems during transition.

Concluding, Mr. Lindqvist welcomed decentralisation as a chance for increased local democracy and the better management of resources. He underlined the necessity for national safeguards to ensure equal rights. He concluded by urging that the needs and aspirations of people who are disabled be integrated in the general discussion of how to shape future society.

Mme. Alliot-Marie, Minister of State for Education in France, followed by reviewing the progress made towards integration in France. Describing the steps taken, she stressed the importance of early intervention programmes in promoting integration. An understanding of the needs of children with disabilities should enrich schools for all children. It was also necessary to foster integration between the policies and practices of education, health and social affairs departments.

There were sometimes negative effects when placement in a regular school took place without planning and support. Whatever was done should help the young disabled person to integrate into society and work. We should also recognise that understanding the needs and problems of those who are disabled will also help to understand the needs of all.

The Minister of Community Services for the Commonwealth of Australia, Senator Don Grimes, stressed the need to change attitudes, to raise expectations and free those who care for children and young people with disabilities from blinkered thinking. There was a need to question traditional practices, and disabled people should be involved in decisions about their lifestyles and about the appropriateness of services for them.

New legislation in 1986 created a framework to enable local communities to develop services in co-operation with disabled people. There were problems in reallocating resources and overcoming the resistance of traditional voluntary organisations and of some parents. It was important to have clear principles and goals and to recognise that young people with disabilities, and their parents, are the real experts.

The Norwegian Minister of Education, Mrs. Grøndahl, spoke of the role of the media in changing attitudes towards disabled people. She reiterated the importance of new technologies in facilitating integration in both school and in working life. Co-ordination of services for disabled people is one of the most difficult tasks since often it is the "law of the jungle" that tends to prevail. Decentralisation required the co-ordination of services at all levels. There was often no one person with the authority and means to effect co-ordination. She called for the use of positive discrimination strategies to promote equality for disabled youth. To achieve equality, taking into account geographic, social and minority group differences, requires such positive discrimination. With budget restraint, we also need to share limitations on what is possible. Cuts should not just fall on minorities.

The final presentation was made by Mr. Pinto Sancho, Secretary of State for Labour and Social Security in Portugal. He stressed the need for the positive promotion of the employment potential of young people who are disabled, the need for co-ordinated approaches, and the importance of a good information service for families and disabled young people.

Mr. Kenny, Chairman, then invited general discussion structured around four main themes:

- a) There should be only one comprehensive social policy. Policies for those with disabilities should not be separate or merely the consequences of other policies;
- b) Integration in the education system cannot be discussed separately from general policies for primary and secondary education;
- c) There is need for coherent objectives for services so that pensions/benefits and other provision enhance autonomy and competence;
- d) Young people with disabilities have the same human rights as others and thus have a right to adult status. Professionals and services do not yet accept this view in their practices.

A lively discussion followed centred on these themes, together with descriptions by some Member countries of their policies and programmes. The need for strong co-ordinating mechanisms was widely recognised with only the representative of the Netherlands indicating the existence of effective councils at national, regional and local levels.

A second set of contributions concerned the work of consultative committees of disabled persons. A number of comments indicated the increased contribution to policy making of such groups. A recent conference of disabled people in Denmark had resolved that integration has nothing to do with physical structures but with membership in society. Disabled people want to be informed about the preparation of legislation, to be represented on all commissions and to be represented on permanent groups to implement legislation. The point was also made that groups of disabled need resources if they are to be enabled to participate effectively in policy development.

The importance of change starting from the grassroots was also stressed. It was not so much a question of integration, but of a quality of life which might be best described by the term participation. There was a need for an agreed and co-ordinated approach to issues by disabled persons, parents, voluntary organisations and professionals. Politicians tend to use a lack of consensus to justify inactivity.

The question of integration in school involved curriculum change. Experience had shown that integration in school is a necessary prerequisite to integration into society. It is important to develop a total school policy since a failure to include special education within educational policy in general results in segregative thinking. The question for the ordinary school should be "Who is not here?"

There needed to be a new approach to transition which broke the often linear progression from one special institution to another. A better partnership between employment and social affairs was necessary to provide a system of support mechanisms sensitive to individual differences.

In all the initiatives being discussed, there was a tendency to delegate more and more responsibilities to local authorities. This increased reliance on local initiatives to solve major national problems was seldom accompanied by the transfer of resources in times of financial restraint.

The first session was summarised by Dr. M. Gerry who made the following main points:

- i) The issue of integration is evolving; some participants felt it was not a passive term and although the principle is accepted, we now need to ask the question "who do we

segregate?" It is social institutions that segregate. The distinction between desegregation and integration needs to be made;

- ii) Gainful employment as the goal for disabled youth was generally accepted; however, if real, rather than token, success is to result, then industry must become an active partner in promoting employment;
- iii) If equal rights and adult status for disabled people is to become reality, then they must be participants in framing the laws and in the discussions that determine the course of their lives. New information technologies can have a significant impact in providing supportive mechanisms facilitating the participation of disabled youth in adult society;
- iv) The impact of government decentralisation can be significant in balancing the interests of marginal populations and protecting them against the tyranny of the majority. The transfer of budgets within the context of present economic reality was seen as the main difficulty to overcome concerning this issue;
- v) There was a need to establish a set of national goals for social and educational policies to facilitate inter-agency co-ordination, coherent policy development and the systematic allocation of resources to support those goals.

An important factor in the evolution of social policy is who speaks for disabled people. Is it parents, professionals or disabled people themselves? Legislation supporting equal rights is only effective if the legal system can be readily used by the individual.

## **Session Two: Integration**

The session opened with a review by Mr. B. Cerquiglini, Directeur des Ecoles of the French Ministry of Education. Looking at the history of special education, he saw it as an evolutionary process. Legislation and regulation in France has attempted to create conditions for children who are handicapped as similar as possible to those of other children and to bring special provision into the public sector. Regular schools need to become more sensitive to special needs and to open up possibilities to a wider range of children. Teacher training is an important contributing factor to the successful introduction of change.

Integration is not a simple matter of transferring children from one situation to another, but also involves integrating systems and integrating the approaches of many different agencies. It is not possible for ministries of Education to proceed in isolation from ministries of Health and Social Affairs. Joint action is needed, but we also need tools to assess the effects of policy changes in special educational provision.

Mrs. Grøndahl reviewed developments in Norway. She stressed that the focus had been to change regular education and eliminate unnecessary distinctions between children with special educational needs and others. This principle of stretching the regular school and according the right of all children to be educated in them has recently been extended to the upper secondary school. Practising integration influences regular schools and there has been evidence of curriculum change. The next stage is to improve the quality of integration in the context of improving schools as a whole.

Discussion started from the question whether there were more or less children in special schools than five years ago. To which a further question was posed, namely, "Why do we segregate?". The specific needs of children and young people with disabilities led to a discussion of a broader group for whom traditional schooling was said not to be successful. The size of this group was set between 15 and 30 per cent of the school population. Running through the debate was the issue of how to create "schools for all". A second related issue was

how to strike an appropriate balance between the social and academic objectives schools are expected to attain.

There was confusion between the principles and practices of integration as some people tend to set limits on integration, in terms of either the nature, or degree of disability. It seems necessary to recognise that there could be no compromise on the principle although achieving integration in practice is a long process with practical limitations; there cannot be a real commitment to a limited principle.

Some participants saw resources as the major concern considering that integrative arrangements demand extra resources. This was questioned in two ways: the first was whether extra resources were only needed for a transition period, or were a long-term consequence of integrative arrangements? The second approach concerned the distribution of resources within the education system. It was not always the absolute cost but the priority and social status of different provision. Examples were given where sport and music were taking up many more resources than special education, but where the latter was still considered the most resource-intensive sector.

Integration in school is an important preparation for integration and participation in society, not only for those with disabilities but also for their non-disabled contemporaries. Again, the importance of teacher training was stressed.

The final and most significant thread running through the discussion was the question of political will for change. Where changes have been most evident, there is a clear will on the part of national or local politicians to effect change. This seemed more important than many of the practical procedures to bring about change that were also described.

The session was summarised by Mr. J. Fish, who said there had been recognisable progress towards integration in many Member countries. Some of the necessary preparations for integrative arrangements could also be used to retard progress. Research, committees, resources and training were important but could delay commitment. For example, research in the United States had shown that having a child with special educational needs in the class and having consultant teacher support readily available, was made more effective than traditional preparatory training.

Pupils and their parents with long-term experience of separate special schools may be reluctant to choose an integration option. More seems to be expected of children with disabilities in regular schools than is expected of other children who are accepted for what they are. The major conclusion of the session was that we should seek to develop schools for all. The justification for segregation should be constantly questioned.

### **Session Three: Transition to Adult and Working Life**

Senator Grimes opened the first session on the second day of the Conference. He argued for an agreed policy and a co-ordinated approach to transition. We needed to develop strategies to help people with disabilities to cope better. It was necessary to lower risks but not to eliminate them. It was important to increase the capacity for meaningful choice. The goals were economic self-sufficiency and independent living. Mechanisms existed to achieve these goals but approaches are fragmented and it is necessary to seek greater coherence.

He went on to question many of the mistaken assumptions made about people with disabilities and the low expectations of those who are for them. The three phases of transition – the final school years, further education and training, and the early years of work and independent living – were treated separately. There was a lack of continuity as individuals passed from one area of responsibility to another.

Although a lack of jobs is a reality for all youth, negative attitudes on the part of employers and parents may make it even more difficult to obtain work for young people with disabilities. Education must begin preparing these young people for work in the final years of schooling on real work sites. Education, further training and vocational services need to be all a part of a concerted plan, to be followed up into working life in order to not lose skills on the way.

There was a particular problem at the age of sixteen where individuals had to decide whether to go on with a transition programme or accept a disability pension. What was needed was a suitable income support system, including tax incentives and subsidies to encourage employment and independence. It was necessary to encourage, without patronising.

Mr. Pinto Sancho then stressed the importance of reformulating the employment goal by building bridges between schools and work. For those with disabilities, the first step to participation was co-presence in the same situation at school or at work.

The discussion which followed included statements of policy and practice by some Member countries with a number of themes emerging. One view was that schooling was sometimes an elaborate preparation for a life-long pension. The nature of an appropriate secondary curriculum for transition was also questioned. We need to be much more critical of special settings for children and young people with disabilities. Also, there was too much reliance, in education and training, on generalisation. This approach is less effective than specific real experience. The best preparation for work is work.

A second theme was the need to give more responsibility to those who are disabled. They should participate in policy-making and planning. Young people with disabilities should be part of the youth culture with the same opportunities to experiment as their contemporaries.

The workplace was seen as a crucial area of social interaction for disabled people. It was suggested that in some cases, 20 per cent of those with disability pensions could get jobs. The isolation and lack of throughput of sheltered workshops was criticised, but there were also those who saw these workshops as an important part of a range of provisions.

Individual case management through the period of transition was also an issue where department and agency responsibilities were not always clear or known by individuals and their families. The work of the Kurator in Denmark was described as one significant approach to continuity and coherence in case management.

Fragmented planning and a lack of co-ordination of services at the local level were also mentioned. The view that governments were more concerned with the nature of service delivery systems than whether individual needs were being met by those services was expressed. There was a need to revamp the social philosophy being applied to disability. We should redefine the direction of development in a coherent set of principles which would act as parameters for policy. This would involve defining transition objectives for all young people within which supporting arrangements for those with disabilities would be based.

Dr. E. Montobbio summarised the session. He said integration into the adult world seldom enters the future plans of parents of children and young people with intellectual disabilities. Integration means role allocation in society, but the roles must be genuine. Many countries have decided that it is much easier to give pensions to those who are disabled rather than assign them roles. For an active life in society, it is necessary for integration to the adult world to be preceded by integration in school.

There are four areas calling for effort and commitment:

- i) The legal and political area where national and local initiatives can be made;
- ii) The organisational level where backup services to support those with disabilities in the community are necessary;

- iii) The level of direct assistance through training in real situations;
- iv) The cultural level where it is necessary to work to create conditions conducive to the acceptance of those with disabilities in a society which is responsive to their needs.

#### **Session Four: Implications for Future Policies**

After lively discussion through the Conference, the final session attempted to focus on major outcomes and translate them into concrete policies. Mr. Lindqvist opened the session and was the main animator. He said that it was easy to agree on paper, but papers do not change lives. What actions can we take? Achieving equality involved widening the circle of those who participate. If there is a right to education, then "schools for all" means that the same people must be responsible for all pupils. There is need to look at the distribution and at the curriculum to include and allow for individual variation. We should ask who is segregated and why?

In a "society for all", there is no equality if some work and some do not. The right to work is important to the self-esteem and independence of those who are disabled, including those with severe disabilities. The question is how to structure the labour market and get the right relationship between pensions and work.

Decentralisation, new technology and a scarcity of resources are the three trends evident during discussions. How to serve the needs of the disabled in a decentralised system was a major question. With respect to resources, ministers of Labour meeting at the OECD had already said that priority should be given to disadvantaged groups. It was necessary to restructure resources that currently support segregation to support integrative measures.

As a result of the Conference, CERI should:

- i) Analyse the consequences of the discussions that have been held;
- ii) Look at the consequences of new technology in the field of disability;
- iii) Involve more disabled people in CERI activities;
- iv) Make known the Conference documentation to OECD activities in general and urge the inclusion of matters concerning disabled people in other OECD programmes of work.

The final discussion accepted the importance of the "school for all" approach as the basis of responsible citizenship in a democracy. It involved continued curriculum development and attention to teacher training. It also required a counselling and guidance system like the Kurator system in Denmark. Other contributions described initiatives in Member countries. Because many of the means to achieve integration and a better transition now existed, the question was not whether these objectives were possible, but whether they were wanted.

During summaries by Dr. Gerry, Dr. Montobbio and Mr. Fish at the end of the session, it was recognised that there were still difficulties in arriving at generally accepted definitions, for example, of integration. This was particularly true in respect of the reservations made by individuals. The question of what was school success and the balance between academic and social goals in secondary education was a difficult one. Choice, in terms of independent living, economic self-sufficiency, social and family life, involved three sets of goals: individual/client goals, agency goals and national goals. Finally, where are all the services and systems taking us in terms of the personal development of the individual with a disability? Handicap is not an illness and we need to address the issue of the healthy development of self-esteem and adulthood with a recognised contribution to the community from those with disabilities.

This was the first high-level Conference held by OECD/CERI in the field of disability and handicap. It was evident that since the start of work in the field in 1978, much progress has been made in forming networks of specialists, identifying innovative practices and developing a framework for the discussion of common issues. Areas of future work were identified and major concerns clarified during the Conference. Perhaps the most significant conclusion was the reaffirmation that disability is not a peripheral issue, but an integral part of social and educational policy. It is no longer acceptable to look at disability issues as an afterthought in policy development. It was for this reason that the final session recommended that the Conference papers and discussions should be brought to the attention of the OECD Council and to other areas of work within the Organisation.

## POSTSCRIPT

A provisional report of the Conference was made to the OECD Council on the 9th of January 1987. That report outlined the agenda and main themes of the Conference and set out six conclusions to be drawn from its work:

- i) The attribution of handicap as an individual characteristic is unacceptable. The degree to which disability becomes handicapping depends on interaction with the environment, other people and the organisation of society – hence the overriding importance of the acceptance of the integration principle in school as well as in work; the problem then becomes one of how to overcome the difficulties in the practical application of this principle;
- ii) Integration within the school is the first essential step. However, a policy for a “school for all” (in the Swedish Minister’s words) has important consequences, above all for resource allocation and the development of curricula and pedagogy, including teacher education suited to individual differences, implying a general educational plan for all and including the disabled, from early childhood onwards;
- iii) Recognising that young people with disabilities have the same human rights as others and, thus, the right to adult status; paid employment must be the main objective, though other forms of useful work and valued activity cannot be excluded as possible alternatives in times of job shortages;
- iv) Income maintenance was not enough and pensions for disabled persons should not become disincentives to seeking paid employment; there is a role by governments to stimulate employment opportunities for such persons within both the public and private sectors. This would call for appropriate legislation, the setting up of intermediary services to link the milieu for disability to that of work and sustained strategies to change public attitudes, particularly those of parents and of employers;
- v) Above all, there was a need to involve the disabled themselves in schemes and decisions affecting their future and creating an environment in which they could develop their self-esteem, independence and capacity to cope and this could best be done if they were to be involved in actual work situations;
- vi) Finally, it was recognised that in all this the major bottleneck which remained was the co-ordination of policies and services among the various ministries and government departments concerned.

A further plea was made to bring the issues discussed at the Conference to the relevant bodies of the Organisation, particularly the Committee for Manpower and Social Affairs. There was continued support from Member countries for this area of work.

The Council noted the provisional report on the CERI Conference and requested the Secretary General to transmit the provisional report to the relevant bodies of the Organisation.

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BY JAMES K.W. ATHERTON—THE WASHINGTON POST

Rep. Steny H. Hoyer won applause for his work on bill for disabled.

## Spotlight Finds Hoyer

### Congressman Leads Charge for Disabled

By Kent Jenkins Jr.  
Washington Post Staff Writer

For Maryland Rep. Steny H. Hoyer, usually one of the supporting actors on Congress's stage, this was his first role as leading man.

Hoyer spent months overseeing legislation that would ban discrimination against the disabled, and last week his House colleagues passed it overwhelmingly.

As network television cameras looked on, Hoyer was greeted by cheers and applause from disabled people and their lobbyists, who called the bill the most important civil rights act passed since 1964.

"If it weren't for Steny," said Patrisha Wright, chief lobbyist for a coalition of disability-rights groups, "we would not be talking a major victory today."

Hoyer is no stranger to the limelight. He is chairman of the House Democratic Caucus, the fourth-ranking job among his chamber's Democrats, and a member of the influential Appropriations Committee. But this was his first time taking the lead on such a major national issue.

"When I get money for Metro or the Baltimore-Washington Parkway, there's nobody there cheering you on," said Hoyer, a longtime Prince George's County politician.

"That's sort of expected of me. It's particularly gratifying to be successful on this."

During nine years in the House, Hoyer has established himself as a consummate political insider.

His job as caucus chairman is

See HOYER, D5, Col. 1

# Rep. Hoyer Takes Center Stage on Disabled Issue

HOYER, From D1

long on politics and short on ideology: He brokers compromises, assembles coalitions and monitors the collective mood of his Democratic colleagues.

He initially took up the disabilities-rights legislation because of friendship, not philosophy. Its original sponsor was Rep. Tony Coelho, who resigned from the House last June after questions were raised about his personal financial dealings.

Coelho cares deeply about the bill, in part because he has epilepsy. As he left Congress, Coelho asked Hoyer to step in.

"This was going to be a tough bill because it inconveniences a lot of people," Coelho said. "I needed somebody to replace me as a driver, a well-respected insider. Steny was the first person I went to."

But as the proposal's House sponsor, Hoyer entered an arena in which the philosophical and financial conflicts were sharp.

Despite what one lobbyist called the bill's "motherhood-and-apple appearance," it encompassed several politically volatile issues, such as safeguarding the rights of people with AIDS and recovering drug addicts. There was also de-

termined opposition among business organizations worried about lawsuits and the cost of compliance.

Before the fight was over, Hoyer had bruised the feelings of some of the bill's opponents; one business lobbyist says "we were not listened to."

Hoyer also displayed uncharacteristic passion, at one point taking the House floor to denounce an effort to weaken protections for people infected with the AIDS virus as "the Jim Crow amendment of 1990."

In battling for the bill, he made some new friends as well.

Lobbyist Wright said that when Hoyer took over management of the legislation, "I was concerned . . . because he was never one of the people I turned to historically on civil rights issues. But I quickly learned I was in good hands." Ralph Neas, executive director of the Leadership Conference on Civil Rights, said Hoyer brought "tremendous procedural knowledge and tremendous commitment" to the bill.

Rep. Vic Fazio (D-Calif.) said that Hoyer's high-profile advocacy was noticed by his House colleagues.

"Because people who gravitate toward leadership are usually generalists, Steny has not been identified with a particular issue," Fazio

said. "The Americans with Disabilities Act has become his issue."

Hoyer said, "Historically, I have been perceived to be a good politician, someone who knows how to work the system or work the community. 'I have not been perceived to be issue-oriented.'"

Hoyer built his reputation in the House by being what he calls "a nuts-and-bolts, institutional, in-house" person. Columnist Christopher Matthews, who was the top aide to former speaker Thomas P. "Tip" O'Neill Jr., calls Hoyer one of the House's "shop stewards."

According to House members and lobbyists, Hoyer's negotiating skills were crucial in guiding the disabilities bill.

When Hoyer took over the bill, it

had passed the Senate and been endorsed by President Bush. But critics, particularly conservative Republicans, contended that little thought had been given to the measure's legal and financial ramifications. And because of its scope, the bill faced a difficult trip through four House committees.

To simplify the process, Hoyer spent months negotiating with Rep. Steve Bartlett (R-Tex.), who considered the bill too expensive and so vague that it would spawn tons of lawsuits. Late last year they produced a compromise that drew widespread bipartisan support. The bill then moved smoothly through all four committees and passed the House with only 20 votes in opposition.

Bartlett calls Hoyer "the most formidable adversary and most reliable ally I've ever encountered. The concepts of this bill were easy but getting the right words to accomplish them were tough . . . He had an understanding of the politics of the issue without being slavish to politics."

The bill bears the marks of legislative give-and-take.

When Bartlett and other Republicans complained that the cost of making buildings accessible to the disabled might bankrupt small businesses, language was added requiring only "readily achievable" changes.

Hoyer said he sought to understand the objections of the bill's opponents, visiting a grocery store and riding an Amtrak train to listen to objections. Then, according to many of those involved, he was able

to modify the measure to reconcile widely varying viewpoints.

Nancy Fulco of the U.S. Chamber of Commerce said Hoyer "was trying to serve a constituency in the disability community, but he always made himself available to us to listen. We did disagree, but our arguments were reasonable."

A few differences between the House and Senate versions of the bill remain to be worked out, but the bill could become law by the end of June.

His work on the legislation may benefit Hoyer in the House. "Inside the institution, people can see him as a substantive person," Coelho said.

But it could make additional work for him as well. "The highest compliment I can give him," Wright said, "is that I will ask him to sponsor additional bills in the future."

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INTERNATIONAL POLICY SYMPOSIUM ON THE COORDINATION OF PROGRAMMES TO SUPPORT  
EMPLOYMENT OF PERSONS WITH DISABILITIES

Washington DC, 3rd - 5th June, 1990

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INTERNATIONAL POLICY SYMPOSIUM ON THE COORDINATION OF PROGRAMMES TO  
SUPPORT EMPLOYMENT OF PERSONS WITH DISABILITIES

Washington Marriott Hotel, 1221 22nd Street N.W., Washington D.C.  
3rd - 5th June, 1990

BACKGROUND INFORMATION

For the past ten years OECD/CERI has been studying the process of transition from school to an adult working life for young people with disabilities. The project has been actively supported by the US Departments of Education and Labour. During this time a number of studies have been carried out in various Member countries on innovative approaches relating to the transitional phase.

Several reports have been produced as a result of these studies which analyse the situation in the countries concerned and offer policy recommendations. The issues and conclusions reached in the report "Young People with Handicaps - The Road to Adulthood" (1986) were found to be particularly relevant to United States policy makers and many of the innovations described might be taken into consideration when developing future policies.

In order to effectively disseminate the result of the OECD/CERI work on Disability in this area it was decided to organise a symposium in Washington D.C. to which international and United States experts should be invited to discuss the various innovative models in operation in Member countries. The symposium is being organised jointly by the Department of Labor, the University of Maryland and OECD/CERI.

The symposium will have two primary objectives:

- a) to promote discussion, between European and United States specialists, on the successful innovatory practices identified by the OECD/CERI work and consider issues related to their replication
- b) to inform United States policy makers about these initiatives and to discuss their implications for future policies

It is hoped that the discussions will be useful not only as a means of disseminating the innovative models found in Member countries relating to the transitional phase, but will at the same time be a forum to identify further issues which may be studied by OECD/CERI.

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INTERNATIONAL POLICY SYMPOSIUM ON THE EMPLOYMENT OF PERSONS WITH DISABILITIES

Sponsored by the US Department of Labour and the University of Maryland in  
Co-operation with the OECD/CERI, Washington DC, 3rd-5th June, 1990

ACTIVE LIFE FOR YOUNG PEOPLE WITH DISABILITIES  
Towards Employment for Young People with Disabilities

This draft paper of Part One of the report has been prepared by Mr. John Fish, Consultant to CERI, and the Secretariat for the Conference in Washington DC on 3rd-5th June, 1990. Part Two of the report will appear together with Part One in a subsequent publication.

The views expressed in this draft paper of Part One are those of the authors and do not commit either the Organisation or the national authorities concerned.

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## TABLE OF CONTENTS

### PART ONE

		<u>Page</u>
I.	Background	2
II.	Introduction	2
III.	A Brief Review of Early Activities	3
IV.	The Concept of Transition	10
V.	The Changing Context	14
VI.	Evaluating Transition Services	18
VII.	Action - Conclusions and Recommendations	21

### PART TWO

(will appear with Part One in subsequent publication)

Appendices

**TOWARDS EMPLOYMENT FOR YOUNG PEOPLE WITH DISABILITIES**  
**CONTEXT AND BACKGROUND**

**AN INTRODUCTION TO TRANSITION**

**PART ONE**

**I. BACKGROUND**

It is ten years since the Centre for Educational Research and Innovation (CERI) of the Organisation for Economic Co-operation and Development (OECD) began work in the field of disability and handicap. This work, generously funded by the Office of Special Education and Rehabilitation of the United States Department of Education and by the Department of Labour, has been widely and solidly supported by Member countries.

The focus of work has been the adolescent age range and activities have concentrated on two main themes, integration into school and transition from school to adult and working life.

This ten year period of activity is drawing to a conclusion as new CERI programmes are planned. This report:

- i) Summarises the work done on the theme of transition to adult and working life with particular reference to the role of employment in successful transition.
- ii) Discusses the major issues facing those concerned with that phase
- iii) Introduces criteria by which to assess effective transitional arrangements.
- iv) Raises policy issues for further consideration.

The report is a distillation of experience at the end of a sustained period of work which is intended to assist those working in national, regional and local services, and voluntary agencies, to evaluate transition policies and practices.

**II. INTRODUCTION**

Individuals make many transitions in their lives, from home to school, from elementary to secondary education, from school to higher education, from

school to work, from single to married life and from work to retirement. Each transition has common features which include the establishment of personal space and worth in new groups and settings.

However, by far the most important transition is that from school through adolescence to adult and working life. This most often establishes the basis for relationships, rewards and recognition in adult life. A successful transition should result in an effective and satisfactory life style and a sense of personal value in the family, neighbourhood and community.

The need for a conceptual framework for the process of transition is now recognised. The contexts in which those with disabilities are making the transition from school to adult and working life is changing markedly in Member countries in the 1990's.

Transition from school to work and adult life can be studied from two major standpoints:

- i) the psycho-social development of the individual to adulthood in his or her family and culture; and
- ii) the means and conditions, including attitudes, values, programmes, institutions and services, which enable the achievement of the objectives of transition in a particular country, region or neighbourhood.

The OECD/CERI programme of activities has included both kinds of studies. This report, however, concentrates on the second theme. Here the achievement of adult status, while an essential outcome of an effective passage through transition, is incidental to the study of the policies, programmes and services which are effective in gaining and supporting employment and independent living. The report continues with an overview of CERI work.

### **III. A BRIEF REVIEW OF EARLY ACTIVITIES**

During the early years of the OECD/CERI programme emphasis was placed on studies of integration in secondary education. At that time many young people went directly from school to work. For those who were 'handicapped' residential care, sheltered work or time filling activity were often all that was available. Further education and vocational preparation for them was relatively uncommon.

However, in some Member Countries, the transition phase was receiving recognition and it was, therefore, possible to undertake some transition studies. These were reported in The Education of the Handicapped Adolescent - The Transition from School to Working Life, OECD/CERI 1983.

This publication reviewed programmes, many of which were in separate special or sheltered institutions. It introduced a major paper by Tizard and Anderson entitled 'Significant Living without Work' which reflected the high level of youth unemployment in the late seventies and the generally low expectations for those with severe disabilities in many countries.

However, the publication identified three threads which were to grow in importance as work progressed. These were:

- i) the nature of adult status for those with disabilities,
- ii) the contribution of parents to effective transition to adulthood and
- iii) the effectiveness of well planned vocational preparation in increasing open employment opportunities. Until that time these aspirations had seemed improbable for many of those considered to be disabled, as well as for their families.

By the early 1980s concern about the transition phase for all young people was becoming evident in many countries. Integration initiatives had also supported demands that young people with disabilities should be included within regular vocational preparation arrangements.

The International Year of the Disabled Person, in 1981, also stimulated better preparation for adult and working life for those who are disabled. This was the background for a second series of OECD/CERI activities, initiated in 1982.

#### **Who are the Disabled?**

Throughout the work on disability there were pressures to describe and use categories of handicap as a descriptive framework. Although initially there was a demand for statistics to define the group classified as disabled, it soon became clear, particularly during transition, that definitions varied so widely between countries and between government departments within countries that few compatible statistics existed. It was, therefore, decided to use a non-categorical approach.

There were a number of reasons for this, not least the adverse effects on expectation of some categorical labels. Another major reason was that the distinction between a disability or significant difficulty and its handicapping effects for the individual was not always recognised. This latter distinction, and its implications for policies and practices was discussed in detail in Education Monograph No 1 'Disability and Restricted Opportunity' OECD/CERI 1986.

The report "Young People with Handicaps - The Road to Adulthood" (OECD/CERI 1986) summarised the position as follows:

*"the word handicap should only be taken to describe the relationship of the individual, with a disability, with his environment. Five important points need to be made about this relationship, namely:*

- i) *A child or young person may have a disability, but the degree to which it is handicapping depends on his or her interaction with the environment or on the effects of this interaction on the environment itself;*

- ii) Disabilities can be made more or less handicapping by the attitudes and expectations of the community. More specifically, school, social and employment situations are significant determinants of the degree of handicap resulting from an individual's disability;
- iii) Successful intervention strategies and environmental modifications may significantly reduce the handicapping effects of disabilities;
- iv) The handicapping effects of disabilities change over time and from situation to situation;
- v) The concept of handicap is a dynamic, changing concept and not a static one where handicap is used to describe only the deficits in an individual's skills, behaviours and attitudes."

The report went on to illustrate the definitions common in the fields of education, health, social welfare and employment and to draw attention to the ways in which different sets of criteria may significantly affect the individual during transition.

The need to recognise a 'situational definition' is an important element in effective transitional arrangements. Equally important is the need to avoid premature classification. The extent to which disabilities are handicapping cannot really be known, and should not be determined, until the end of the transition phase. All too often individuals are categorised before transition begins, with a consequent lowering of expectations, and thus an increase in their handicaps in adult life.

#### **Position in 1986**

During 1986-1987 a number of important reports and monographs were published. These included 'The Road to Adulthood', already referred to, together with 'Active Life for Disabled Youth', a review of policies and practices for young people with disabilities, in Australia, France and Sweden. This was followed by a significant high level conference held in Paris in December 1986.

#### The 'Road To Adulthood' Report noted that:

"until comparatively recently, there has been little recognition of the transition process as a whole. Different government departments, services, agencies and disability groups have made their separate contributions, but they have seldom been seen or planned as part of a unified process involving all aspects of an individual's life as he or she moves from school through training and continuing education to adult and working life.

It has often been left to individuals and their families to find their way through a maze of services and regulations concerned with specific aspects of transition and, where options exist, to know what they are".

That report defined transition as:

"the process by which an individual grows through adolescence to adulthood in the social, cultural, economic and legal contexts provided by families, communities and national policies."

Generally agreed goals for the completion of the transition process were seen as vital. Although it was recognised that, from a socio-psychological perspective, the achievement of adult status by an individual was difficult to define, it was possible to agree on a number of general indicators of adult status for all young people in their middle twenties, that would hold good across cultural boundaries.

The report goes on to say:

"These objectives or criteria are not always recognised as applying to those classified as handicapped. It is the contention of the 'equal rights' movements that they should. It is also the thesis of this report that the objectives of transition should be the same for all, regardless of disability. Only the means, the time to achieve them and the degree to which they may be attained may vary. There should not be a separate set of objectives which imply limited expectations, particularly at the outset of the transition phase."

The report grouped these objectives under four main headings:

- i) Employment, useful work and valued activity;
- ii) Personal autonomy, independence and adult status;
- iii) Social interaction, community participation, leisure and recreation; and
- iv) Roles within the family

Transition needs to be seen as a total process, not only uniting specific aims within the four main aspects into a coherent whole, but also in terms of continuity as the individual moves from school through continuing education and training to work and independent living.

It is essential that transition can be defined in these broad terms if national, regional and local policies and practices are to encompass the contributions of the many different government departments and agencies which contribute to the phase. It is also essential if authorities are to provide a coherent pattern of services readily understood not only by young people and their families but also by the different professionals who work on transition programmes."

The report then outlined the major issues which had arisen during the programme of activities, described interesting innovations and drew a series of interim conclusions. It said:

"Stated simply, the transition period has been recognised as increasingly important, particularly if all the resources devoted to early

childhood programmes and to the education of those with disabilities and difficulties are to be used effectively. Transition to adulthood is a necessary phase in a community's responsibility for the care and education of its young people. To neglect this phase, leave it to chance or to the vagaries of a chaotic non-system of different responsibilities is to be wasteful and neglectful. Neglect increases the long-term burden on society of those deemed handicapped. Appropriate transition programmes will increase the number of handicapped persons who can escape dependency and passivity and contribute and participate in society."

The 1986 Conference. This conference, referred to at the beginning of this section, was based on the 1986 'Road to Adulthood' Report and the review of policies and practices in three Member countries.

Six main themes were selected for the Conference agenda:

- i) Policies, responsibilities and practices in the pre-compulsory school years;
- ii) Aspects of integration in the school years;
- iii) The process of transition to adult and working life for individuals with disabilities;
- iv) Employment, sheltered employment and alternatives;
- v) Decentralisation, local responsibilities and equity issues; and
- vi) How a social policy for all children and young people, which includes the needs of those with disabilities, is developed.

The conference was attended by ministers and senior representatives from 21 Member countries. Six conclusions were agreed. These were:

- i) The attribution of a handicap as an individual characteristic is unacceptable. The degree to which disability becomes handicapping depends on interaction with the environment, other people and the organisation of society -- hence the overriding importance of the acceptance of the integration principle in school as well as in work; the problem then becomes one of how to overcome the difficulties in the practical application of this principle;
- ii) Integration within the school is the first essential step. However, a policy for a 'school for all' (in the Swedish Minister's words) has important consequences, above all for resource allocation and the development of curricula and pedagogy, including teacher education suited to individual differences, implying a general educational plan for all, including the disabled, from early childhood onwards;

- iii) Recognising that young people with disabilities have the same rights as others and, thus, the right to adult status; paid employment must be the main objective, though other forms of useful work and valued activity cannot be excluded as possible alternatives in times of job shortages;
- iv) Income maintenance was not enough and pensions should not become disincentives to seeking paid employment; there is a role by governments to stimulate employment opportunities for such persons with both the public and private sectors. This would call for appropriate legislation, the setting up of intermediary services to link the milieu for disability to that of work and sustained strategies to change public attitudes, particularly those of parents and employers;
- v) Above all, there is a need to involve the disabled themselves in schemes and decisions affecting their future and creating an environment in which they could develop their self-esteem, independence and capacity to cope and this could best be done if they were to be involved in actual work situations; and
- vi) Finally, it was recognised that in all this the major bottleneck which remained was the co-ordination of policies and services among the various ministries and government departments concerned.

The report and the recommendations were subsequently approved by the Council of OECD and considered by all its Directorates. The Manpower Division later set up a Panel of representatives of interested Member countries to review employment policies for those who are disabled. One of the first steps taken by the Panel was to invite experts from the Transition Programme to contribute to their discussions.

#### **The 1986-1989 Programme**

A further series of specific activities were undertaken in the period 1986-1989. These studies were planned to look in detail at a number of significant themes which had emerged from previous work. They included studies of the achievement of adult status, of technology and employment, of case management through transition and of supported employment. These topics were seen as significant in 1986.

Seminars and workshops contributed to these studies which addressed six specific aspects of transition in all. Papers derived from these studies are set out in Part Two of this report.

- i) Adult Status Work on the theme of adult status continued with a major seminar in Sweden in 1988 and the publication of 'Disabled Youth - The Right to Adult Status' OECD/CERI 1988. It is important to draw attention to the legal, cultural and socio-psychological aspects of achieving adulthood for the individual. However, in this report the personal achievement of adult status is not dealt with in any detail. It is assumed to be one of the major goals of transition, achieved through

gaining employment, and an essential outcome of an effective transition process. It is an indicator of the quality of arrangements to be judged within local, cultural and family context.

- ii) The Labour Market for Young Disabled Persons. A report on this issue in Part Two provides a context for many of the other studies. It is now becoming clear that demographic changes in most Member countries indicate a significantly smaller population leaving education for the labour market in the 1990s. The opportunities for those with disabilities may therefore be greater if training and preparation are effective.
- iii) Technology and the Employment of Disabled Young People. A number of aspects of technology have been explored including the experiences of young people. Reference to technological aspects, which influence transition, will be made throughout this report. One general conclusion is that while appropriate technology can be shown to be enabling, some developments may also prove to increase individual handicaps.
- iv) Case Management during Transition. One important aspect of inter-agency co-ordination is how the individual and his or her family is helped to manage transition. A number of approaches were identified including the liaison officer in Sweden and the Kurator in Denmark. A detailed study of case management was undertaken which involved commissioned papers and a working seminar in Denmark.

The commissioned papers and the conclusions of its work will be published separately. A further report, by Martin Gerry, describing the Danish system, setting the initiative in its national context is also available.

### **Vocational Preparation in the Final School Years**

The two activities on vocational preparation in the final year at school and supported employment are inter-related and papers on each appear in Part Two. Particular features of the work were the development of individual transition plans in the final school years and a close study of supported employment arrangements in Genoa, Italy and in specific sites in the United States. The Genoa arrangements are described in detail in a separate report prepared by Martin Gerry. The studies illustrate how far expectations for young people with severe degrees of disability have risen since work started on the transition theme. Careful preparation in the final years of school and well planned placements and supporting arrangement in open employment are successful even where job opportunities are limited.

Standards and Strategies. It is now possible to identify successful strategies which facilitate effective transition. Some of these are set out in Part Two. It is equally possible to identify criteria and standards which characterise effective transition.

#### IV. THE CONCEPT OF TRANSITION

It is not suggested that there is a clear and universally accepted blueprint for successful transition from school to adult and working life. However, it is argued that there are some general guidelines for developing transitional arrangements of quality.

Although transition is receiving more attention in most Member countries, there are seldom agreed conceptual frameworks or objectives for its completion. The programmes available for young people often put stress on preparation for employment or on preparation for independent living and responsible participatory citizenship, rarely on both.

The objectives for young people as a whole are seldom seen as appropriate for those who are disabled. If they are applied to those with disabilities there are usually explicit or implicit professional reservations about the future of individuals. Specific kinds and degrees of disability are often associated with stereotypical views of the future.

This report argues that all countries require a conceptual framework for transition if resources devoted to child health, education and vocational preparation are to be used effectively. Such a framework should provide a clear statement of the objectives of transition for all young people including those with disabilities.

Transition should be regarded as a unitary process by which the individual grows through adolescence to adulthood and achieves the balanced state of dependence and independence which is expected of all citizens.'

It should include the development of skills appropriate for open employment, those appropriate for an independent life, those required to pursue a range of leisure and recreational pursuits and, above all, those necessary for social interaction, constructive self-advocacy and community participation.

The achievement of these objectives for some individuals may take longer and they may require long term support to sustain them. But young people with disabilities should not be additionally handicapped by placing limitations on their choices and opportunities, in the early stages of transition or, because of preconceptions about the effects of disabilities on adult life, thus limiting the objectives of programmes for them.

A conceptual framework must look beyond the existing pattern of facilities and services, which often circumscribes what is offered to young people, and should consider the range of options it might be realistic to offer if the resources, currently available, were used in a less sector specific and competitive way. A more co-ordinated approach to agreed ends would result in a more effective use of resources.

The sections which follows set out a conceptual framework for transition and some of the major elements essential to its effective attainment.

## **A conceptual framework**

### **Agreed Objectives**

It is easy to assume that all government departments, agencies, voluntary organisations and professionals together with parents and the young people themselves are working towards the same agreed objectives for the outcome of the transition phase.

However, lack of communication and co-ordination is evident even in the most caring societies. The policy reviews, carried out in 1986, showed one government department putting considerable resources into programmes to enable school leavers who are disabled to enter employment and live independently while another department was using even more resources to award pensions provided the same people remained dependent and unemployable.

This is but one example of conflicting aims and interests. There are many others. What the CERI programme of activities has shown is that inter-agency and inter-professional co-operation can only flourish where programme objectives and outcomes are agreed. A first step in planning for transition is to specify and agree aims and objectives for the phase.

### **Overall Aims**

It is suggested that the aims of the transition process fall into the four main groups:

- i) Personal autonomy, independence and adult status;
- ii) Productive activity (i.e. "working life") leading to economic self-sufficiency;
- iii) Social interaction, community participation, leisure and recreation;
- iv) Roles within the family.

It is the contention of this report that these aims should apply to all young people who are disabled, whatever the nature and degree of their disabilities. Transitional programmes for all should work towards the same objectives. Any modification of these objectives should only take place after young people have had experience, education and training directed to these ends. More limited expectations are inappropriate before the final stages of transition.

Effective practices demonstrate that appropriate training technology, longer periods of training (involving direct experience) and positive expectations can enable even the most severely disabled young adult to achieve much higher levels of competence in employment and independent living.

Aspects of the overall aims will be discussed in Part Two. At this stage two points should be emphasized; first it is necessary to see the transition phase and process as a coherent whole; and secondly a coherent

holistic framework is vital if all the agencies, institutions and people involved in the phase are to work towards common ends.

### **Coherence**

Experience has shown that the specific skills required in particular jobs are often of considerably less importance than the social and life skills necessary to function effectively in a place of work. Participation in the community together with access to recreational and leisure activities depends on managing one's own resources, particularly those derived from paid employment, as well as on social skills. An independent life in a family or appropriate social group requires the status of a contributor as well as competence in the other areas of adult life.

Many programmes still concentrate on an aspect of transition, employment or independent living for example, in isolation from other programmes; assuming that other aspects of individual development will "happen". The individual cannot be neatly divided into his health, education, social welfare and employment parts although administrative arrangements are often based on this assumption.

While it is unrealistic to expect that divisions of administrative responsibility will not persist or have an acceptable rationale, it is possible to hope that responsibilities will be seen as shared and will be exercised towards agreed common ends.

Coherence in transitional arrangements requires joint planning and inter-professional and inter-agency collaboration at national, regional and local levels. These themes are illustrated in case studies in Part Two.

### **Personal Autonomy**

Personal autonomy for those who are disabled is not just a quality of life but a human right. This is an aspect of transition where the expectations of parents and professionals have a crucial influence on the personal development of the individual young person. Do facilities and services result in young people having choices and managing their own lives?

The transition phase should include a major restructuring of professional and parental attitudes to and relationships with disabled young people if they are to achieve a positive self-concept and manage their own lives to the maximum extent. Self-presentation and self-advocacy are essential ingredients in transition programmes.

### **Work**

The concept of significant living without work, outlined in earlier reports, is no longer acceptable. Similarly, studies have shown that sheltered work is seldom an effective preparation for the labour market. The aim must be open, paid employment for all.

Open employment and supported open employment, either for individuals or small groups in enclaves, has proved to be possible and sustainable for a much higher percentage of young people with severe disabilities than was thought the case when the programme of activities began.

A unified concept of transition must now assume that all young people are capable of making a contribution through the useful work involved in self-care and through open or supported employment. Time filling trivial activity is personally demeaning and handicapping.

### **Social Interaction and Community Participation**

This is the aspect of transition where issues surrounding the concept of integration come to the fore. Of course the process of integration is important for the preparation of non-disabled young people to accept and understand their contemporaries who are disabled. Nevertheless, at the end of transition, whether a young person was educated or trained in separate or integrated programmes is not the major question. It is whether he or she is equipped for living in the community and has confidence to interact with others and participate in neighbourhood activities. However, there is no doubt that those most equipped have been educated in regular schools.

Social interaction is not a separate issue from that of employment. It is often in the work place that many of those with disabilities may have their only opportunity to make relationships outside their home. Work is not only a sign of adult status, and a provider of resources, it is one of the main areas of social interaction for many.

### **Roles within the Family**

It is not unreasonable to portray many traditional professional and parental expectations for young people with severe disabilities as an "eternal childhood". Facilities and services have moved towards providing a "normalised" pattern of life. Nowhere is this more evident than in the living arrangements which have followed deinstitutionalisation. But adult patterns of relationships and living may be less easy to achieve.

In recent years human rights movements have questioned continued dependent status. Marriage and having a family are slowly becoming recognised as acceptable goals and a conceptual framework for transition must embrace the adult family roles, and group living patterns as legitimate objectives for young people with disabilities.

### **Concluding comment**

Frameworks are used to plan services. Services themselves require evaluation and a later section of this report looks at evaluation in more detail. But first consideration is given to the changing political and social contexts that have developed over the past few years and its significance for the development of effective transition arrangements.

## V. THE CHANGING CONTEXT

Over the ten years that OECD/CERI have been looking at aspects of disability, major changes have been occurring in the context within which transition takes place. The acceptance of equal rights as an objective, demographic changes, different conditions in the labour market including the influence of new technologies and a redefinition of social protection policies are some of them. All influence the future of young people with disabilities.

### **Equal Rights and Opportunities**

Although, in the 1960s and 1970s, professionals were moving towards the concept of a normal pattern of life for those who are disabled, it was the equal opportunities movements and parents groups, together with effective advocacy by disabled people themselves, which brought equal rights and equal opportunities policies to the fore. Campaigns, lobbying, using the courts and new legislation have all had their effects in Member countries.

However, equal opportunities approaches tend to stress the minority needs of ethnic groups, women and other disadvantaged groups and often omit those of individuals who are disabled. Nowhere is this more apparent than on entry to the transition phase. Conditional rights are often based on performance while at the same time administrative definitions of handicap deny young people with disabilities the experiences which might enable them to reach performance criteria.

While the rights to education training and independent and small group living have been recognised, the right to employment in the community with others has been less often accorded. A considerable advance has been made in parts of Italy and the United States where, as the papers in Part Two show, legislative changes and policies have recognised the failure of the sheltered workshop through-put model and encouraged supported and open employment.

Rights and opportunities are closely linked with professional expectations. Some professional groups have a vested interest in the separate dependent "handicap industry" while others have been at the forefront of new initiatives to support integration, independent living and employment.

The evidence shows that the expectations of professional staff with appropriate training can be very much higher, when combined with properly resourced and sound training technology for the young people concerned.

Over the last decade, there has been an increased recognition of the common human rights of people with disabilities. Each Member country can assess the extent to which human rights and adult status are now accorded to some or all of its young people and adults who are classified as "handicapped". But it is clear that in many areas there is still a long way to go.

What is evident is that policies, based on proven experience, directed towards their support in the community are enabling young people with disabilities of all kinds to make a greater contribution in society.

## Demographic Changes

When the OECD/CERI programme of activities first began there were high levels of youth unemployment in most Member countries. Attention was given to youth employment training programmes. However, employability, judged on school performance or traditional ideas about disability, was usually an entry criterion. Prospects for young people with disabilities were poor. The concept of significant living without work was being seriously considered.

Now, ten years later, the youth group entering the labour market is considerably smaller (20 to 30 per cent in some instances) while the percentage of aging people moving out of the labour market is increasing sharply. High levels of retirement through age and a smaller cohort of young people entering the labour market are bringing a realisation that labour shortages may occur.

Developed societies will need as many working contributors to the economy as possible. The prospects for those previously not recruited, the minorities, the disadvantaged and the disabled should improve.

The innovations described in OECD/CERI publications, and the conclusions drawn from them, hold out a great hope that an increased percentage of disabled young people will be enabled to enter open employment. This will occur where there is effective transitional preparation and continuing support for those with severe disabilities who may need it.

To achieve this many staff, concerned with vocational preparation, will need to change their attitudes and have higher expectations. Personnel management staff will need to develop positive recruitment policies which recognise the economic advantages to employing people with disabilities.

## The Labour Market

The pool of young labour may be shrinking but there are also changes in the nature of the labour market. Some of these are due to the emergence of different patterns of manufacturing and service industries, a distinction which is becoming increasingly blurred, and others to new technologies.

Major changes include a reduction of the labour required in manufacturing and agriculture and an increase in the number of jobs in what are now termed service industries. Many of the new "high tech" industries are carried out in small units and their location is no longer concentrated on the areas where natural resources exist. New economic groupings are also having their effect on employment.

New skills are demanded by new industries but these skills are required for shorter periods. There is less permanence in job skills and individuals may be expected to retrain two or three times during a working lifetime.

This has a paradoxical effect on the employment of young people who are disabled. While new employment patterns may make it easier for them to gain employment, the difficulties some experience in retraining and change may make it hard for them to retain jobs.

## Technology

The speed of labour market changes is considerably increased by the introduction of new technologies, particularly information technology. The latter has a pervasive effect which can result in lowered costs, a better integration and control of activities, increases in productivity and making small batch production more economical.

However, it is the effect of new technology on the employment prospects of young disabled people which is relevant to the transition phase. A number of studies of the use of technology have been undertaken in Member countries. It is hoped to bring them together in a single report. The United Kingdom study, already published in that country, summarises common issues. It is concerned with the development and application of technology in the post-school years. Its content is illuminated by the first hand experiences of students and the staff who taught them.

It is one of the most comprehensive surveys of the use of technology in post-compulsory school age education ever undertaken in the United Kingdom. The experiences reported confirm that appropriate technology can:

- provide access to new opportunities in education and employment;
- give increased independence;
- assist with integration into mainstream activities and
- motivate.

New technologies can enable students with disabilities to have a wider choice of courses and curricula and to have new and enhanced education and employment opportunities.

But effective support, in the form of information, advice and technical services, and appropriate training in the use of technology are necessary for students, their teachers and carers.

The individual needs of students should be paramount in providing new technology. The matching of new technology to student needs is essential. The survey provided little evidence of such matching being evaluated. The complexity of the range of post-school provision, of the different responsibilities of services and of the needs of individuals requires facilitation. The task of 'facilitators' would be to enable students to gain access to adequate information, to advice and to experience good practice.

Although it is possible for students to acquire new skills, via technology, the opportunity for them to demonstrate those skills during work experience or in employment is less in evidence. Many employers seem unaware of the enabling potential of new technology for young people with disabilities.

The information base provided by this study is an important source of reference nationally and internationally.

### **Social Protection**

OECD Reports show that many Member countries are adjusting their social protection policies. The features of this process, outlined in one report [MAS/MIN(88)1] are that:

Social policy has become less preoccupied with the enhancement of benefits and services and more concerned with questions of efficiency and effectiveness. Although it should be noted that the two are not necessarily incompatible.

A declining proportion of households consist of two-parent, two-generation, nuclear families. Other types of living arrangements -- including one person households, lone parent families and the institutionalised elderly -- are demanding increasing and different forms of social protection.

The growth of personal incomes has created the potential for a larger proportion of the population to carry a greater part of its own social risks.

The deterioration of economic conditions, which has shifted priorities towards the social problems associated with unemployment in some countries, has weakened those social security systems which rely on employment as a criterion for eligibility and as a basis of revenue, and has exposed a basic lack of consistency between social security systems and manpower and education policies.

At the same time, changes in the structure of the labour markets, such as the growth of part-time employment, strengthen the need to review the relationship between social security and labour market policies.

The problems of economic performance, taken together with the present magnitude of social security transfers, have drawn attention to the possible adverse incentives on work and savings behaviour arising from high levels of taxation and social security benefits.

The prospect of an aging population structure has cast a shadow over the future of those social programmes (health, old age pensions) whose costs and outlays are age related.

The changing age and economic structure of the population is leading not only to a growing number of frail elderly people in need of caring services but also to a large number of "young elderly" people who are largely retired from the labour market but who may expect to remain physically and intellectually active for ten or twenty years after retirement.

These factors are seen as giving rise to issues which cut across policies such as "activity versus dependency", "responsiveness to social and demographic change", "the balance between public and private finance and provision" and "the efficiency and flexibility of social provision".

While social protection policies are under review it is an opportune moment to feed in new ideas about the most effective ways of facilitating and supporting the transition of young people with special needs as potential contributors to rather than consumers of national resources.

### **Financial Implications**

The essential feature of the financial implications of transition is the relationship between short-term investment in the transition process and the long-term costs of dependent institutionalisation.

It is argued in this report that financing effective transitional arrangements results in a significant proportion of young disabled people being able to earn money and live relatively independently. The cost of support for them, in work and independent living is significantly less than the cost of support currently provided for those forced to remain dependent.

Studies in the USA and Sweden have shown the high cost of long-term dependency and the value to the economy of even the limited earnings of those who are disabled.

The papers in Part Two show what can be done and the positive benefits which result not only in economic terms but in the quality of life for those who are disabled. In current political and economic circumstances, it would seem foolish to neglect experience which enables young people, previously excluded from active participation, to work, exercise choice and contribute to the economy because of short-term parsimonious budgeting during the transition phase.

## **VI. EVALUATING TRANSITION SERVICES**

In order to develop transition services and to improve their quality it is necessary to maintain an on-going evaluation of them. This section discusses the main criteria as they have emerged from the research work. This section outlines some of the main issues. A more detailed description of one working system is given in Part Two.

### **The role of assessment in transition arrangements**

In most systems there is an individual assessment process towards the end of the school period. The purpose of assessment and the use to which it is put is crucial.

If assessment at the end of schooling is used to categorise, if school performance is used to decide what individuals can or cannot do in other situations and if the result is to limit choices and options such procedures may themselves be handicapping.

What is required is positive assessment, which includes evaluating performance in real life situations outside school, and which identifies individual transition needs. Assessment, as a basis for an individual transition plan, ITP, as described in Part Two, is a positive approach.

Each of the following criteria can be assessed along a number of dimensions that relate to the orientation of the transition service under scrutiny. These dimensions are as follows.

- i) The extent to which policies and practices are integrative or segregative.
- ii) The extent to which services are oriented towards care or independence.
- iii) The extent to which the staff are client oriented.
- iv) The extent to which services are either inward-looking or initiate co-operation with other agencies.
- v) The extent to which services recognise individuality and choice.

### **Criteria**

The main criteria, or indicators of quality, of a service are given below. They are presented in more detail in Part Two.

### **Information**

Because of the fragmentary nature of responsibilities and services in most developed countries it is very difficult for young people and their families to get clear and accurate information about all the options available to them. The comprehensiveness, relevance and clarity of available information is thus an important criterion of effective transition arrangements.

### **The Programme Balance**

A narrow professional conception of transition can result in a lack of balance in programmes of activities. They may not give equal weight to all the major aims already set out. Do the young persons opportunities, experiences and training possibilities achieve a reasonable balance between preparation for work, for independence, for participation and for an adult family life?

### **Continuity**

As individuals move from school to vocational preparation, from one agency to another and from one professional to another discontinuities are common. How much do professionals working in different phases of transition work with each other to ensure coherence and progression in what is offered? What steps are taken to ensure that there is a consistency and continuity in the programme, in approaches and in expectations. These are important criteria of effective arrangements.

### **How are Families Involved?**

Professionals working with adolescents tend to concentrate their efforts on developing the independence of the young people with whom they work. They may inform parents about programmes but they do not always discuss acceptable objectives with them.

The involvement of parents and families in the care and management of young people with disabilities is continuous. Their views of the future for their children are an important influence on what transition programmes can achieve.

The nature of parental and family involvement is therefore an important criterion. Effective transition involves a new tripartite relationship between young people, their parents and professionals.

### **What are Service Priorities?**

Individuals are entitled to a personal plan for their transition but often they are treated as stereotypes or fitted into available programmes and met by a take it or leave it attitude. The extent to which facilities and services are flexible, change in response to individual need over time and respond to consumer demands is an important criterion.

### **How is Participation and Self-Advocacy Developed?**

Is it evident that steps have been taken in programmes that develop choice, self-presentation skills and participation in decision-making? At the end of the transition period an effective programme should result in young people who are capable of managing many areas of their lives. This element is an essential part of effective transition arrangements.

### **How do Professional Practices Change?**

The previous criterion has implications for professional practices. Growing independence and adult status require a greater equality in participation and decision-making. An important criterion is the changing pattern of professional practice which should result in a recognition of the disabled person as a responsible adult taking as many decisions as possible.

### **Financial Management**

Again this criterion relates to the previous one. The question is whether resources are always channeled through professionals or whether the young person gradually obtains control over them. At the end of transition most young people with disabilities should be able to take some responsibility for managing their own time and resources and an effective programme will demonstrate this.

## **VI. ACTION--CONCLUSIONS AND RECOMMENDATIONS**

This report has addressed conceptual issues about transition and indicated criteria which should be applied to transitional arrangements. Evidence in the form of innovations and sample case studies are given in Part Two. This final part of the report promotes an agenda for services and agencies. It is hoped that it will help all concerned, with the transition of young people with special needs from school to adult and working life, to discuss and evaluate their current arrangements.

The main thesis of the report is that policies, facilities and services for the transition of young people with disabilities and special needs should be an integral part of policies, facilities and services for all young people. Transition for them is not a separate or different process or an "add on afterthought" to arrangements for all young people.

### **General Consideration for All Readers**

There are many actions which can and should be taken to disseminate the ideas in this report and to ensure that they inform both policies and practices. Among these ideas are:

#### **An Awareness of Transition**

There is a need for a greater awareness and understanding that transition from school to adult and working life is a unitary process involving all aspects of a young person's life. This is particularly true for those with disabilities and difficulties. It cannot be tackled adequately where separate agencies provide for elements of the process, eg. preparation for employment, in isolation from other elements.

#### **The Importance of a Comprehensive Programme for Transition**

Becoming a contributing citizen is not simply a matter of acquiring increased technical and vocational skills; important as these are for the individual and the economy. The development of personal and social skills is equally important. To help individuals with special needs to live a reasonable life as independently as possible, even when work is not available for them, may save a long term and costly commitment to dependency and professional care.

### **The Definition of Handicap**

The concept of handicap is a major determinant of attitudes, policies and practices. The need to clarify the definition of handicap over the transition period is evident. The conclusions to be drawn from work to date are clear. First, a distinction must be made between a disability and its handicapping effects and, secondly, the word "handicap" should now be seen as a social construct defining the relationship between the individual and his environment. This definition is a dynamic one which implies that the degree to which a disability is handicapping depends on the situations experienced by the individual, the attitudes and expectations of others and the intervention strategies and environmental modifications which are made.

It follows from this definition that disabilities and difficulties which may be seen as handicapping in schools and colleges may be viewed differently by the health, social welfare and employment sectors. These sectors may have their own criteria for determining who is handicapped. Although disabilities may remain constant whether they are considered handicapping or not, many depend on which sector is making a judgement and for what purpose the judgement is made; for example, employability or health care. During the transition phase, individuals may move into and out of categories which may label them as "handicapped".

Handicaps are now commonly defined relatively in terms of situations and administrative procedures and not in terms of individual deficits. Thus the potential contributions, which may be made by all departments and agencies, to increasing or limiting the degree to which individuals with disabilities may be handicapped should be recognised.

### **The Educational Contribution**

The contribution to both vocational and personal/social preparation by secondary schools and by continuing and adult education should not be minimised. Post compulsory school education is not a charity or optional extra for those who are disabled but it is a major element in enabling those with disabilities to make a long term contribution to the national and local economy.

### **The General Approach**

There are two principal approaches in meeting special needs:

1. On the one hand they can be met by:

- a) Making the range of opportunities on offer to all more responsive to individual differences in styles and rates of learning;
- b) Making that range of opportunities more accessible to those with disabilities; and
- c) Providing arrangements to support individuals with special needs in regular programmes;

2. On the other hand special needs can be met by the provision of separate special opportunities for groups of individuals with the same disabilities or difficulties.

Where the objectives of the range of provision is integrative these are not alternatives. Both approaches may be part of the range and the issue is one of balance and overall aim.

Greater priority should be given to improving the responsiveness of regular facilities, services and supporting arrangements. This priority, reflected in resource allocation, would lead to a more effective use of resources.

### **National Authority Considerations**

One of the clear messages from the OECD/CERI studies is that national authorities unwittingly adopt a very fragmented approach to disability and handicap. Within this fragmentation contradictions occur between practices intended to develop the contribution to the work force of those who are disabled and those practices which for sound humanitarian reasons, support the social needs of the disabled but runs the risk of creating dependency and are ipso facto handicapping.

There is seldom an awareness of the effects of all departmental policies on those with disabilities, nor are their needs often considered when policies are formulated. A major question for national authorities is how to develop an appropriate mechanism by which to keep the implications of developing policies, for those who are disabled, under review. Other considerations should include:

### **Inclusion in General Policies**

Is meeting the needs of children, young people and adults with disabilities included within general policies for education, health and social welfare? Are separate policies for these needs developed after general policies have been decided? Are they always consequential?

### **Definitions**

How are disability and handicap defined in education, health, social welfare, employment and other spheres of the individual's life? Are the definitions of disability and handicap used by different departments and agencies consistent with one another? Do they encourage maximum competence and independence?

### **Coherence and Continuity**

Do the different government departments and other agencies involved work towards agreed objectives for transition? Are there coherent policies covering the phases of transition from school to adult and working life? Is there continuity between phases of education and training?

### **Financial Support**

Does the system of pensions and benefits for those defined as handicapped encourage or discourage autonomy, independent living and supported and other forms of employment?

### **Education**

How separate is educational provision for those with disabilities and difficulties? How far does it prepare individuals for employment and independent living? How far are programmes influenced by the experiences of those who are disabled?

### **Employment**

What steps are taken to introduce and support young people and adults with disabilities in employment? Are some types of disability excluded from consideration?

### **Local Authority and Neighbourhood Considerations**

In developing plans for continuing and adult education, social services, employment support and other relevant arrangements in a local authority area or neighbourhood those concerned should:

- a) Recognise that to make an ad hoc response to individual special needs as they arise is both time consuming and expensive;
- b) Carry out needs analyses in their areas, involving all agencies, services and voluntary organisations;
- c) Develop appropriate local definitions of need, determine the extent of need and develop the facilities and services to meet them;
- d) Consider the resources necessary to provide those facilities and services and their appropriate allocation;
- e) Consider and ensure the development of an effective curriculum for transition which is responsive, to the maximum extent possible, to individual needs;
- f) Make clear in the plan and elsewhere the ways in which it is proposed to evaluate the effectiveness of facilities and services, using the same standards as for other provision;
- g) Consider the training needs of staff to meet special needs and ensure that they are included in the in-service programmes.

### **Institution and Service Considerations**

Among matters for consideration by individual facilities and particular services should be:

- a) Ensuring that the managing board, of institutions and services for all young people, has a member with responsibility for seeing that special needs are recognised and met;
- b) Ensuring that the institution or service links with other voluntary and statutory agencies to increase awareness of special needs;
- c) Contributing to a needs analysis in the community served by the institution or service;
- d) Developing an equal opportunities policy within which special needs are defined and provision to meet them is an integral part of what is on offer;
- e) Ensuring that the institution or service plans achieve a reasonable balance between arrangements supportive to general facilities and services and separate special arrangements;
- f) Ensuring that the person with overall responsibility for the co-ordination of provision to meet special needs is a member of the senior management team of the institution or service;
- g) Ensuring that all members of staff are aware of special needs and of the importance of making a contribution to meeting them;
- h) Providing in-service education and training opportunities for all staff to develop awareness, understanding and a contribution to meeting special needs;
- i) Arranging to monitor and evaluate provision to meet special needs within the same framework and standards as is used to evaluate all the work of the institution or service.

#### **Considerations for Specialist Staff**

Staff with specialist responsibilities will be making a continued and varied contribution to institutions or services including:

- a) Defining the special needs which can be met within current staffing and other resource limitations;
- b) Working with professionals in other services and agencies to develop agreed aims for transition;
- c) Making oneself aware of available community resources to facilitate transition;
- d) Within local authority, institution and service guidelines, developing individual transition plans;
- e) Developing a continuity of support for the individual over all phases of transition.

### Concluding Comments

The above agenda is a formidable one but it should be recognised that the tasks are not new and not additional. They are integral parts of procedures for policy development, policy implementation and policy evaluation. They become an additional burden where those regular procedures do not naturally include the consideration of equal opportunities, the needs of those with disabilities and of others with special needs. Awareness and knowledge of disabilities and special needs and their automatic inclusion in policies and practices will become less burdensome if the guidelines for action set out above are seriously considered.

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INTERNATIONAL POLICY SYMPOSIUM ON THE EMPLOYMENT OF PERSONS WITH DISABILITIES

Sponsored by the US Department of Labour and the University of Maryland in  
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ACTIVE LIFE FOR YOUNG PEOPLE WITH DISABILITIES  
Managing Transition to Adult and Working Life

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## TABLE OF CONTENTS

### PART I. A FRAMEWORK FOR TRANSITION

The Background

Criteria for Evaluation Transitional Arrangements

The Purposes of the Study

### PART II. STUDIES OF TRANSITION IN SELECTED COUNTRIES

The Kurator System In Denmark

by

Gia Boyd Kjellen

The Liaison Officer in Sweden

by

Eje Hultkvist

Accompanying Services in France

Rehabilitation Follow-up Teams

by

Thibault Lambert

Developing Individual Service Plan For People  
With Severe Disabilities, Manchester, United Kingdom

by

Mick Molloy

Case Management In the United States

by

Ruth Luckasson

Bibliography

### PART III. CONCLUSIONS

Essential Elements In Managing Transition

## PREFACE

The Centre for Educational Research and Innovation (CERI) of the Organisation for Economic Co-operation and Development (OECD) launched a programme of activities in 1978 on the themes of integration and transition to adult and working life for young people who are handicapped. This programme was widely supported by Member countries.

From 1982 to 1986 a programme of activities on the theme of transition from school to adult and working life was carried out. This was made possible by generous financial assistance from the United States Office of Special Education and Rehabilitation. The programme resulted in a number of reports including Young People with Handicaps - The Road to Adulthood published in 1986.

During 1986 a study was undertaken of national policies for children and young people who are handicapped, with the co-operation of the authorities in Australia, France and Sweden. At the end of the study a high-level conference was held in Paris in December 1986 resulting in a further series of reports.

The programme of activities concerned with young people with disabilities is now drawing to a close with a series of detailed studies of particular aspects of transition. One of these activities is devoted to the management of transition.

Among the outstanding issues to be highlighted in the transition programme was the question of how to achieve continuity and provide a recognisable point of reference for young people and their families during the transition phase. This was viewed from a number of different standpoints including:

- a) the information and support necessary to enable young people, and their families, to manage their own transition through the maze of different government departments and agency responsibilities;
- b) effective means of providing continuity of support as individuals move from education through training to work and adult life;
- c) the co-ordination of different education, health, social welfare and employment policies and services during adolescence towards agreed objectives for adult status and the maximum autonomy.

The more detailed study of the management of transition involved three elements. A review of the outcomes of the transition programme, the

commissioning of a series of studies of specific arrangements in Member countries identified by the review and a small working seminar in Denmark in November 1988. The seminar was arranged with the active co-operation of the Danish authorities.

This report, concerned with "case management", covers all the work done on this aspect of transition including the findings of the seminar. It is in three parts.

Part I Describes the main outcomes and issues to emerge from the transition programme and the context for the particular study of "case management";

Part II Consists of the commissioned studies of transition management;

Part III Draws conclusions about effective means to help individuals and their families to manage their own transition.

This report has been prepared by consultants and the Secretariat. The views expressed in Part II are those of the authors of the papers. The views expressed elsewhere, as an outcome of the study, do not commit the Organisation or the national authorities concerned.

Part I

A FRAMEWORK FOR TRANSITION

## THE BACKGROUND

### Adulthood

One of the first questions to ask about transition is transition to what? It is far from certain that a young person with a disability will be expected to become an adult or will be treated as one. The question of how adult status is or is not achieved was an important element in the transition project.

The broad conclusion was reached that "adulthood" is a less than precise description of a legal and social status and of a range of individual, social and economic choices. It may be defined differently in different countries and cultures but there are common features. "Coming of age" can be observed in four main areas of life:

- a) personal autonomy and independence;
- b) productive activity;
- c) social interaction, community participation, recreational and leisure activities;
- d) roles within the family.

One of the problems in most modern developed societies is that each of these areas of life tends to be dealt with separately by a different department or agency.

What is needed is a conceptual framework for transition which encompasses all aspects of the move through adolescence to adulthood. Within this framework there needs to be a clear statement of objectives in behavioural terms. If these objectives could be agreed by all agencies, by professionals, by parents and above all by the young people themselves, there might be a more concerted effort to develop coherent approaches to the process of transition and less confusion in areas of responsibility.

### Phases of Transition

The OECD/CERI study recognised three inter-related phases of the transition process, namely:

- a) the final years of schooling;
- b) further education and vocational preparation; and
- c) entry into work and adult life.

These phases will cover varying time scales in Member countries but they each have different characteristics. There is a need to recognise their inter-relationship.

### **The Concept of Handicap**

The time of transition reveals confusion in the use of the term handicap (This issue is discussed more fully in Educational Monograph, No.1, OECD/CERI, 1987). Traditionally it has been a label attached to individual deficits. Two things have become increasingly clear, namely, that it is important to distinguish between a disability and its handicapping effects, and that for the same disability these effects vary from person to person and from situation to situation.

It follows from this situational and individual definition of handicap that to categorise people by a single criterion, such as a specific disability, is wrong. It leads to stereotyping, to inappropriate expectations and to a lack of planning for individual needs.

During the transition phase, education, social service, health and employment agencies may use different criteria to define who is handicapped. Some definitions are based on the help needed for the individual to be as independent as possible and others are based on the assumption that the individual remains totally dependent. These differences reflect attitudes which may be crucial to individual development during adolescence.

What modern methods and technology have achieved is a lessening of the handicapping effects of many disabilities with a consequent raising of expectations. We should no longer talk about "a handicapped person" but about "a person who is handicapped". This is not just a semantic quibble. It represents a significant change and a recognition that it is attitudes, situations and administrative decisions which determine whether disabilities are more or less handicapping.

### **Assessment**

The process of assessment is potentially handicapping. In practice an individual's behaviour, achievement and response to education may be very potent determinants of what is offered on leaving school. Being in a special group may limit what is expected and offered. But the skills and knowledge expected in school may bear little relationship to those expected in most living and working situations.

The purpose of an assessment and the evidence on which it is based are important considerations. If the purpose is to categorise, then the result may lead to stereotyping and low expectation. If the evidence is school performance, then the result may be relevant to further education but not to employment and independent living. Capacities for employment and for independent living should not be assessed without observing experience in those situations. Assessment should lead to a plan for the individual and not be a prediction simply based on past performance.

## Major Problems of Transition

These have been described in detail in the OECD/CERI publication Young People with Handicaps - The Road to Adulthood, op.cit. Major issues may be summarised briefly as follows:

**Different Starting Points.** At the end of the school period individuals may be in regular classes, special classes, special schools, hospitals and residential institutions. They may leave schools at different ages. A major question is how far the situation and the age from which transition starts result in preconceived ideas which limit the range of opportunities that is offered to the individual.

**Continuity.** In each of the three phases already described, different agencies and professions have different objectives and may attempt to cover different curricula. It is becoming increasingly important to develop a continuity of concern, curriculum and objectives.

**Consistency.** Individuals and their families face inconsistent demands and attitudes. One agency may be giving support to develop employment skills while another may be awarding pensions and benefits on the basis of the individual's incompetence. Is it in the individual's best interests to remain dependent? There needs to be some consistency in expectations from one agency to another.

**Time Scale.** There is no doubt from international experience that extended education and training, particularly for young people with severe disabilities, pays off in terms of employment and independence. In the United States or Sweden an individual would normally remain in high school until at least 18 and then have at least between two and four years vocational preparation. Compare this with the one or two years offered after the age of 16 in other countries. Adult competence is often expected from those at the greatest disadvantage many years before it is expected of others whose education is extended.

**Co-ordination.** The young person with a disability might well ask whether health, education and social services know what each other are doing and whether they work with voluntary organisations. There is a need for a great deal more local co-ordination at least to the point of agreeing on common objectives.

**Parents and Transition.** It is during the transition phase that parents of young people with disabilities may become particularly concerned about their children's future and, without help, may inhibit progress towards adulthood. Professionals need to work with them over time to develop an idea of the adult life that is possible. Information is not enough. A new three-way relationship needs to be formed between parents, professionals and the young person concerned.

**Self-Presentation and Advocacy.** We need to move away from the "eternal childhood" model of disability towards a more positive view of adult status. New relationships will not be possible unless those with disabilities are enabled to express their views and manage their affairs.

**Categorical or Individual Thinking.** We have had a tradition of people being labelled according to category of handicap and then receiving a package of services, whether they need them or not. How far can we individualise service delivery? How far do we expect individuals to achieve an adult status where they manage their own resources and select the services they need? By labelling someone as disabled do we automatically assume that they must be dependent on professionals and agencies?

#### CRITERIA FOR EVALUATING TRANSITIONAL ARRANGEMENTS

It is possible to begin to look at the transition phase as a whole and to ask questions about it. These questions can be a form of evaluation and might include:

1. What are the objectives of assessment at the end of schooling? Are they to categorise or to develop an individual plan?
2. What is the balance of the curriculum in the final school years and in further education? What is the respective weight given to academic, social, vocational and life skills objectives?
3. What information is available to young people and their families about the range of transition facilities and services available to them?
4. What continuity of concern, curriculum and objectives is there between the three phases of transition?
5. How are parents and families involved in planning and supporting their child's transition?
6. How far do transitional arrangements encourage the development of independence, autonomy and self-advocacy?
7. Do professional practices and areas of responsibility affect the development of effective transitional arrangements?
8. What financial arrangements support an individual and his or her family during transition? How far do these arrangements inhibit or facilitate autonomy and adult status?
9. When we aim for community provision and participation, how do we define community?

These questions add up to a review of how transition is managed. It is this management aspect of the process which was the main objective of the study.

## THE PURPOSES OF THE STUDY

The period of transition from school to adult and working life for young people who are disabled is often a bewildering array of services and areas of professional responsibility. From a relatively simple situation, where the school is a natural focus for professional co-operation, individuals and families move to an often uncharted territory where there are few clear signposts and where different service criteria and objectives may not be compatible.

One of the major issues to emerge from the OECD/CERI transition project was the need to look in more detail at the ways in which transition can be managed more successfully. The term "case management" has been used to summarise the issue but it is a shorthand requiring explanation.

The different contexts in Member countries and regions within them, together with their cultural values and social policies for young people, are a powerful influence on the transition process and on the adult status it is possible for those with disabilities to achieve. However, given that all individuals have to make some form of transition, there are common concerns about how this is best managed.

The purpose of the study was to discuss these common concerns in detail, to examine practices which appear to be effective in facilitating a successful transition and to look at ways in which important features of those practices might be incorporated into professional practices in other countries.

### Study Themes

There are three broad themes for the study:

- a) The development of coherent transition plans for individuals during a phase when different agencies, with different responsibilities, may not be working towards the same objectives;
- b) The achievement of a proper balance between the management of their own transition by individuals and its management by professionals;
- c) The identification of professional activities and services that are effective in facilitating the transition of individuals and in helping their families to accord adult status.

### Outstanding Issues

The study was intended to address a number of specific issues. The focus was on the individual and his or her family and the ways in which agencies and services contribute to transition. Among topics for discussion were:

- a) Are there agreed objectives for transition to which departments and agencies work?

- b) In what ways is information made available to individuals and their families to enable them to plan transition?
- c) To whom can individuals and their families turn for help during transition?
- d) Are plans for transition made individually or are there stereotyped and limited expectations and opportunities linked with categories of handicap?
- e) What continuity exists over the move from school to work and independent living, and who provides that continuity?
- f) How are individuals prepared for managing their own transition?
- g) What kinds of person are seen as helpful in assisting transition, what do they do and how should they be trained?
- h) Among the range of role options -- key worker, facilitator, case manager, progress chaser, guide, counsellor -- which seems to be the most appropriate within the multi-agency context of transition?

Part II

STUDIES OF TRANSITION IN SELECTED COUNTRIES

## THE KURATOR SYSTEM IN DENMARK

by

Gia Boyd Kjellen

### Introduction

One of the particular concerns to emerge from the OECD/CERI transition study was the ways in which young people and their families get information, guidance and counselling during this important phase in their lives. Different options and agency responsibilities present a complex challenge to case management and guidance services.

A unique approach, identified in Denmark, was the Kurator system. In preparation for a specific study of case management during transition it was decided to study the Kurator system in more detail. This abridged report is based on a study visit during one week in May 1987.

### The Programme of the Visit

Two days were spent in discussions and visits in Copenhagen setting the work of Kurators within the context of special educational developments. Three days were spent looking at the work of Kurators in the Odense area. During this period visits were paid to schools and other facilities and discussions took place with young people and their parents.

### The Education System

A comprehensive school system, from the 1st to the 10th grade, was established by the Education (Folkeskole) Act of 1975. The Act lays down the fundamental principles that everyone, regardless of gender, social origins, geographical origins and physical or mental disabilities, shall have the same access to education and training.

There is no division of compulsory education into stages and all pupils attend the same school from the pre-school stage up to the 10th grade. However, children attending Folkeskolen can finish their last two years in a continuation school (Efterskole) if they wish. Some of the continuation schools are specially designed for disabled pupils and combine teaching and practical work.

If pupils choose an academically-oriented education after completing the Folkeskole course, they can aim for either courses in Gymnasia, or courses leading to Higher Preparatory Examination. The latter is an alternative way of gaining qualifications for higher and further education.

Students choosing a vocationally-oriented education can either apply for apprenticeship training (2-4 years) or a basic vocational education (EFG).

Another element in the system are youth schools run by municipalities for young people between 14 and 18. These provide a wide range of courses to enable less skilled young people to become more employable.

### Legislation

Brief descriptions of legislation relevant to children and young people who have disabilities or significant difficulties are set out below:

Education Department Order on Special Education in the Folkeskole - 1978. This order, implemented in 1980, transferred responsibilities for the education of pupils with disabilities from the Ministry of Social Affairs to the Ministry of Education. Municipalities and counties had to assume responsibility for provision and to finance it with the assistance of block grants from the government.

Paragraph 19 of the Order sets out the respective responsibilities of counties and municipalities for provision and services. It is the responsibility of:

- a) Counties (Para 19.2) to educate pupils with severe (vidtgaende) disabilities. This is often referred to as Paragraph 19.2 education.
- b) Municipalities (Para. 19.1) to educate other pupils with disabilities and special educational needs.

Departmental Order under the Social Security Act 1976 amended 1979. This lays down procedures for Kurators to inform Social Service Departments about pupils in special classes. There is no duty to inform social services, although in some municipalities it is an agreed procedure, but to do so enables pupils to get financial assistance, particularly if they attend a continuation school. Assistance is based on parental income.

Paragraph 42 Social Security Act 1976: This paragraph deals with financial assistance for vocational rehabilitation or further education after a young person reaches the age of 18. The Kurator helps pupils to apply for help. Municipal authorities decide what assistance an individual is entitled to and for what period. This assistance is not dependent on parental income but in some cases may be given as a loan.

Ministry of Education Departmental Order 1988 (draft): This order, which has been circulated for comment, will set out the duties of school psychologists with respect to young people leaving school and the assistance Kurators can give to students in entering further education and obtaining work.

Law on Youth Guidance: This legislation, implemented in 1981, ensures that all young people are given guidance about education and training until they reach the age of 19.

### **The Special Education System**

Special education in Denmark has a long history. The Royal Institute for the Deaf was opened in 1807 and compulsory attendance introduced in 1871. The Royal Institute for the Blind opened in 1811 and compulsory school attendance for the blind was introduced in 1926. The first school for children with psychological and learning disorders was opened in 1855 and attendance was made compulsory in 1959. All these schools were privately financed with a contribution from the State until 1934 when the State assumed responsibility for running the schools.

The first municipal classes for what were then called backward children, were started in 1900. Classes for children with reading difficulties were started in 1955 and for children with motor disabilities in 1961. Finally, classes for psychotic children were started in 1967.

From the 1950s municipalities had responsibilities to meet special educational needs but children with severe disabilities were sent to state schools. In 1980 counties and municipalities took over responsibility for these schools. At the same time Folkeskolen had to provide support for pupils whose development required it and pupils with severe disabilities were assured of eleven years schooling.

The changes brought about by the 1980 Act are based on the principles of normalisation, decentralisation and integration. All disabled children have the same right to education as others. Normalisation is seen as a challenge to society to adapt rather than a demand on the individual to adapt to society.

### **Who Receives Special Education**

Pupils with learning difficulties, for which special education is considered necessary, fall into four main groups:

- a) pupils with specific physical and sensory disabilities, e.g. of vision, hearing and motor function;
- b) pupils with general difficulties in learning, e.g. slow learners, children with intellectual disabilities and with psychological developmental disorders;
- c) pupils with social adjustment difficulties, e.g. children with behaviour difficulties, social and emotional disorders and psychological disorders;
- d) pupils with specific difficulties, e.g. retarded readers and children with dyslexia.

In the academic year 1983/84 special education took up 16 per cent of the total hours of both regular and special education in Folkeskolen.

### **The Structure of the Kurator System**

The branch of the Ministry of Education responsible for special education is the Directorate of Folkeskole and Teacher Training. Within the Special Education Section there is a part-time Kurator advisor. The advisor acts as a link between the Ministry and Kurators in the field. This is a position held by a working Kurator who gives three days a week to the Ministry and works two days a week in the municipality in which he or she is employed. The part-time advisory post is an appointment which can be held for up to seven years.

A Kurator is always a Folkeskole teacher qualified to teach in Grades 1 to 10. Being a Kurator is not a separate career. There is no formal training but most Kurators have taken additional courses in guidance and special education since qualification. A Kurator post within schools is one for which experienced teachers apply and those appointed are teachers who know their school and neighbourhood well.

At present there are 140 Kurators, 110 of whom are school counsellors and 30 of whom combine being a Kurator with being a guidance teacher.

Each municipality works out its own plan for the work of Kurators. If schools are small they may share the same guidance team and small municipalities may also share guidance teams. There is no set work plan for Kurators, who work closely with class teachers, and they develop their own pattern of work within the guidance team.

### **The Guidance Team**

There is a counselling system in all schools maintained by a team which includes the school psychologist, a guidance teacher, a youth advisor and may include a Kurator. It is obligatory to employ a guidance teacher but not a Kurator.

Guidance Teachers: The 1975 Education Act states that there must be a guidance teacher in every school. His duties are to offer guidance to all pupils in grades 7 to 10 about their choice of subjects, about opportunities for further education and about employment possibilities. He arranges work experience and brings in speakers from training institutions and the world of work as part of a guidance programme. A concrete work plan is laid down in a ministry circular for guidance teachers.

Youth Advisors: Legislation, passed in 1981, states that all young people living in a municipality should have access to an advisor concerned with training and work possibilities for up to two years after leaving school or at least up to the age of 19. The aim of guidance is to ease transition from school to further education and work. Guidance sessions should take place twice a year.

Kurator: The third member of the team is the Kurator who is an advisor and guide for pupils with learning difficulties who attend special classes. The extent of pupils' disabilities and their severity in these classes varies from area to area. Some Kurators may also help children with disabilities integrated into regular classes.

Pupils have a right to a Kurator while still at school. Once they leave, ex-pupils have to contact the Kurator if they want continued help. The Kurator has no duty to follow them up.

Many Kurators also work as youth advisors and give disabled pupils the same services as youth advisors including the twice-yearly meeting and the statutory obligation to follow their progress after leaving school. Kurators who also work as youth advisors get additional hours to work with disabled young people.

### Co-ordination

Local councils should co-ordinate all the various guidance arrangements in the municipality for young people under 25. They should also produce a youth team consisting of representatives of the various guidance systems including school and youth advisors, social services and the employment agency. In some municipalities Kurators will be included in the team but this is something decided by each local authority.

### The Work of a Kurator

The Kurator could be described as a transition specialist. He has specialised knowledge of community relations, vocational placement and liaison with other agencies. Guidance during transition is done in co-operation with disabled students, their parents and their teachers. It is an informal process not regulated by legislative rules which aims to develop and facilitate an individual plan for each student.

The guidance Kurators can give covers work, training, leisure time use, family relationships and the economics of family living. The counselling is general and not psychological. If more intensive personal counselling is needed this will be done by psychological services or other agencies.

A Kurator is employed by a local authority with a minimum of 2000 pupils in municipal schools. He is allowed a reduction in his teaching for guidance and liaison work according to the school population. If the number of pupils is between 2000 and 2500 there is a reduction of four hours; from 2501 to 3000 pupils there is a reduction of five hours and thereafter a reduction of one additional hour for each 1000 pupils. In larger municipalities a Kurator will work in a district with at least 5000 pupils.

Various job descriptions for Kurators exist because each local authority can work out its own. The Danish Union of Teachers has one which is as follows. The Kurator:

- a) carries out his work under the responsibility of the central leadership of the school. He is also an assistant to the main school psychologist;
- b) gives advice on the conditions in the school, possibilities for training and jobs during the school years, and during the first years of transition, to pupils in special classes, pupils with general difficulties in learning, other retarded children and their parents. Lately there is a tendency for the Kurator to follow many of these pupils up into their twenties;
- c) works with class teachers, head teachers, the school guidance team, the school nurse, the school doctor and other health and social service agencies to build up a complete picture of the pupils concerned;
- d) has the responsibility, where appropriate in co-operation with the class teacher and other guidance personnel, to see that pupils get guidance on training and employment opportunities;
- e) has the responsibility for making contacts with employers about pupils needing special consideration. With the parents' permission, the Kurator is also able to make contact with employment agencies and employers to find jobs for pupils;
- f) should be well informed about employment and social security legislation as well as conditions and wages. He should be aware of local conditions and take part in meetings about the development of transitional arrangements for the pupils who are his concern.

The local Education Committee in Odense produced a ten-point job description in 1976 which closely follows that of the Union.

#### **A Working Week**

In Odense, a town of 170 000 inhabitants, about 17 000 pupils from pre-school to 10th grade attend 42 Folkeskoler. In six of the schools there are special classes for pupils with general learning difficulties. In 1986/87 there were four Kurators to work with 285 pupils in these classes.

A typical working week, as observed in Odense, would start say on Monday morning with a two-hour period in the office at the school in which the Kurator is based. The four Kurators in Odense share six schools but have their own offices in a particular school. This two-hour period is an important one when parents, teachers and other people concerned with the pupil and the family can be sure to contact the Kurator after the weekend. The Kurator also makes sure that there is one other fixed time during the week, after school hours when he can be reached by telephone.

Teaching in special classes or regular classes takes up most of the week. There is an obligatory two hours devoted to educational and vocational orientation but other teaching time might be in any subject with any grade.

The reduction in teaching hours, which the Kurator has, provides time to visit young people undergoing work experience or in work. New possible employers are sought and liaison maintained with a network of colleagues involved in the transition phase.

Continued contact with parents is an important part of the work and regular visits to home and meetings are held usually after school hours to enable both parents to be involved.

#### **With Whom Do Kurators Work?**

In practice Kurators work mainly with pupils with general learning difficulties who are in special classes. They may also work with pupils with other disabilities who are in regular classes.

The Kurator starts to give educational and vocational guidance in the 8th grade. The subject is taught for two hours each week from the 8th to the 10th grades. It is during these periods that the Kurator gets to know individuals and forms plans for continued education, work experience and work.

Some pupils may choose to attend courses lasting one or two years in continuation schools during the 9th or 10th grades. The Kurator is expected to have a wide knowledge of these schools and to help pupils choose schools and apply for places. Kurators will follow pupils when they attend such schools and assist in finding further training and perhaps work.

The Kurator may work with guidance teachers and class teachers to help individuals with disabilities in regular classes. Responsibility for their transition can be transferred to Kurators if there is a written request from the parents and the school to the guidance team. The Kurator's work is to provide assistance with transitional arrangements similar to that given to pupils in special classes.

#### **Managing Transition**

Through the orientation lessons the pupil becomes aware of educational and vocational possibilities and gains some understanding of the world of work. There are two different aspects of work in the final school years, work experience and work placement. The former is experienced by all pupils and the latter is only possible for pupils in special classes during the 10th grade.

All pupils should have work experiences during the 8th, 9th and 10th grades. For pupils for whom the Kurator is responsible there is discussion about possibilities, consultation with the school doctor and discussion with about consent from parents. Pupils then go out for periods of work experience, in which they are not paid, during the school year and the Kurator pays visits to assess a pupil's response. Pupils can also attend short introductory courses at youth and technical schools.

Work placements are considered particularly important for young people with disabilities to give them confidence and enhance their chances of getting

a job. During the 10th grade the Kurator's pupils are helped to find work placements in a number of forms. For example, a pupil:

- a) might go to school from 8 a.m. to 11 a.m. each day and then to a work placement;
- b) might go to school three days a week and to work for two days or vice versa;
- c) might work full-time for a term and then return to school.

Working conditions and a reward is arranged for each pupil. This will be a payment from the employer which might be an agreed wage or might be made up of an employer's contribution supplemented by social service payments. Employers, parents and the young people themselves turn to the Kurator if any problems arise.

#### **The Kurator's Areas of Work and Networks**

Through teaching and work with pupils, their families and a wide range of other professionals, the Kurator deals with the following aspects of his pupil's life:

- |                                   |  |
|-----------------------------------|--|
| a) School circumstances           | Choice of subjects, vocational orientation, work experience and placement, continued education, educational grants, youth schools.                                       |
| b) Further education and training | Continuation schools, evening schools, home economic schools, vocational schools, apprenticeships, basic vocational education and semi-skilled workers training schools. |
| c) Working conditions             | Choice of career, applications, references, salaries and conditions, careers officers, employers, trade unions and legislation.  |
| d) Personal matters               | Disability, the home environment, economics, leisure time, accidents, military service, social security, public offices and services and social welfare.                 |

#### **Professional Training and Development**

In 1953 a Commission on Youth recommended that 'guides' should be attached to special education. They should help slow learners to get in contact with public and private institutions which might help them. Standard guidance for Kurators was introduced in 1968 because the importance of their work had been recognised and there was wide variation in working practices.

The official status for Kurators was recognised in 1971 when they were established as school counsellors for the Kurator system.

There is as yet no standard training for Kurators. After teacher training and experience, many complete additional courses in guidance or special education. The Ministry of Education arranges a two-day conference each year for new Kurators and a conference to discuss their work. The National Association of Kurators -- who are also members of the Teachers Union -- has been established to promote and develop the work of Kurators and also holds a biennial conference. It has been decided to introduce a development course for 24 participants for two separate weeks in different terms during the academic year 1988-89.

### Visits and Discussions

During the study, discussions took place with young people, parents, social workers and other professionals in schools and workshops.

Among the institutions visited were: Folkeskolen, a boarding school for adults, a sheltered workshop, a rehabilitation centre and a production high school (a school which combines practical and academic learning). These all play a part in transitional arrangements.

### Comments

The work of Kurators in schools can give rise to tensions. A recent survey showed that some class teachers thought that the Kurator was interfering with the traditional role of the class teacher who, in Denmark, may stay with the same class for the whole of a child's school life. On the other hand Kurators thought that some class teachers had insufficient understanding of the problems of pupils with special educational needs.

Many post-school decisions about young people with disabilities are taken by social services. Parents thought that social workers had too many families to deal with and went for cheap solutions. Many parents thought they often had to fight for their children's rights.

A significant element in preparing for transition is the Kurator's report to social services in the 9th or 10th grades. This is important in helping social workers plan post-school provision and financial support.

Interviews with young people illustrate the wide variety of help being given by Kurators. They appreciate the help given. Parents appreciate the informality of the system, some being happy with the contribution of Kurators and others feeling insufficiently involved in decision-making.

The Ministry of Education received the report of private consultants who reviewed the whole guidance system in 1987. Its findings are now being disseminated and considered and will influence the future work of Kurators. There is strong backing from the Ministry of Education for the Kurator system and wish to extend their work to all children receiving special education.

There are plans to double the number of Kurators but financial restraints make it difficult for the smaller municipalities to employ them. A programme of action to help slow learners is also being developed by the Ministry.

## THE LIAISON OFFICER IN SWEDEN

by

Eje Hultkvist

### Introduction

During the OECD/CERI Transition Project, the experimental work of the Liaison Officer was described in a Swedish position report in 1984. It was one of a number of initiatives to facilitate transition that have been studied in more detail for the Case Management Seminar. The report first describes the problems and then shows how the introduction of a liaison officer has helped to solve them.

While studying at the senior level of compulsory school, youngsters are expected to choose an education for a future job. To some, this is a task without great problems, but to most youngsters this task is filled with difficulties, difficulties which could make life exciting and stimulate new efforts. Some obstacles are, however, impossible to overcome. Admission requirements in the education system can mean that the desired education cannot be realised. Moreover, uncertainty in the labour market could make it very difficult to choose a profession.

Many youngsters have had to change their plans when the thought-of assignments have disappeared or been changed. Moreover, the short supply of jobs strikes extra hard on youngsters.

To youngsters with orthopedic handicaps, the choice of education or profession is more difficult than for other youngsters. The supply of jobs is, for them, even less.

Employment and residence are closely related. Many youngsters with orthopedic handicaps have to change their residential locality in order to find employment. The possibility to get a home of their own is, for many people, dependent on the access to personal assistance at many different times of the day.

Youngsters with orthopedic handicaps thus have even more substantial difficulties in carrying out their plans for the future. These problems are well known to those who work with these youngsters, and naturally, above all, to the youngsters themselves and to their parents.

Society has made, and is still making, considerable efforts to ameliorate the situation for people with orthopedic handicaps. In spite of these efforts, there are still great differences in the standard of living between the groups of people with orthopedic handicaps and the population as a whole.

In recent years, schools have taken increasing opportunities to admitting pupils with handicaps of various kinds on an integrated basis. The establishment of regional school consultants has undoubtedly meant a great deal in helping the individual school and its staff, through advice and assistance, to solve educational problems of various kinds. What is still lacking, however, is vocational guidance in greater depth and closer co-operation between schools and rehabilitation staff, as well as with the pupil and his family.

### School Information

Young persons whom we talked to in the early part of this survey called for vocational guidance in which allowance was made for their situation as handicapped persons. They would have liked better information concerning educational opportunities which might be open to them both in upper secondary school and in other forms of education. These young persons felt that careers teachers and Vocational Guidance officers (SYO) today lacked experience of dealing with the problems of handicapped youngsters and were therefore unable to give them adequate assistance. They wanted more information about study routes which could be modified or adapted according to the situation of the individual handicapped pupil.

Today, only a small number of orthopedically handicapped youngsters are taking the vocational lines of upper secondary school. Many, on the other hand, have stated that they would have chosen studies of this kind if the programme had been adapted to suit their needs.

Most handicapped youngsters have less chance than their non-handicapped classmates of obtaining on-the-job training, which in turn means that they have less opportunity of acquiring work experience. To increase their opportunities in this respect, it is important to help them make use of the opportunities which PRYO (practical vocational orientation) can offer. Given careful planning, PRYO/PRAO (practical working life orientation, i.e. work experience) and extended PRYO or adjusted studies can be a great help. Some pupils may need extra experience of a particular occupational field before venturing into a long process of vocational education.

In connection with the transition to upper secondary school, handicapped youngsters need help in analysing their work situation and their assistance requirements. Work in upper secondary school is essentially different from compulsory school, and the individual pupil has to make plans for it in advance.

During their school career, moreover, handicapped youngsters must be helped to find feasible working methods for their subsequent employment or education.

All this means that the help required in upper secondary school can differ from that required in compulsory school. In order, therefore, to obtain a realistic picture of the work of upper secondary school, some of the young persons taking part in the project were given a trial week in the line of upper secondary school which they proposed taking.

Until now, notice of admission to upper secondary school has come late in the spring, leaving little time for practical planning. It is of course important for planning in connection with the transition to be completed before the transition actually takes place, for the pupil to be able to gain access to premises, for technical aids to be installed in advance, for a pupil's assistant to be engaged and so on. For pupils not spending a "PRYO" period at upper secondary school, an extra whole-day visit has been organised instead. In this way, each pupil, together with upper secondary staff, has been able to examine facilities and timetabling and discuss practical points. In many such cases the rehabilitation advisor has also taken part so as to recommend solutions.

### **Housing and Employment**

Most disabled youngsters live with their parents while they are attending school. It has proved difficult for many of them to realise their ambition of a home of their own after leaving school. In cases where this has been possible, they have often had to change their residential locality, moving from a small community to a larger town or city. For many of them it has proved impossible to find both housing and employment in the same locality. These difficulties are often due to a lack of co-ordination between various agents. The shortage of modified flats is another major problem.

### **Housing and Independent Living**

Housing and access to care services are carefully interconnected. Handicapped youngsters require services adapted to suit their need for contacts and social life -- services which are available at the times when young people usually get together. A number of these young persons also require service round the clock if they are to be able to realise their aim of independent living.

Care of this kind can be provided for young persons who are able to obtain service accommodation, but it seems difficult to arrange for those having other forms of housing accommodation. Night-time home help services can seldom be arranged for those living in flats of their own away from their parents or for those continuing to live in the parental home.

As things now stand, most of the care received by handicapped youngsters is provided by their families. Only in exceptional cases have municipal authorities provided home help services for young persons living with their parents. The State, acting through the Care Services Board, has assumed responsibility for the care of young persons living away from home in order to study at folk high school or university.

Housing and access to care services are essential in order for young persons with severe orthopedic handicaps to be able to live independently. If the housing question is not adequately solved, there will be little prospect of employment and meaningful leisure.

The need for care must not be overlooked when helping young persons, during their school career, to plan for the future. It is important for the young persons themselves to analyse the assistance they require and the ways in which they prefer to receive it.

For some years now, jobs have been in short supply for all young persons. The employment situation for young persons with handicaps of various kinds has always been difficult. An increased supply of job opportunities does not always mean better prospects for handicapped youngsters.

These young persons therefore need special support and assistance in their efforts to find employment. This assistance must be offered at an early stage, which means that practical forms of collaboration between school and the various departments of the employment office must be devised while the pupils are still at the senior level of compulsory school. At present this very seldom happens. Consequently many young people today have had long waits between the end of their schooling and their first jobs.

Large numbers of them have confirmed that this waiting period has a devastating effect on their self-confidence, and it often intensifies their feeling of being handicapped and left out of things.

It is therefore important for young persons to explore every opportunity of finding a job. The supply of jobs which can be offered to handicapped youngsters today is extremely limited. A great deal of imagination is a good help in finding new jobs.

Wider opportunities of workplace adjustment and wage-subsidised employment of various kinds should make it possible for more young persons to be helped in finding employment. Over and above the possibilities already existing, new expedients should be tried, and this is in fact being done.

#### **Leisure Time**

Leisure activity opportunities of various kinds are important to all young persons, but unfortunately the leisure of young persons with orthopedic handicaps is often very constricted. Most of the activities of daily life are time consuming. Journeys to and from school often involve periods of waiting, and so on. Many handicapped youngsters, moreover, receive various forms of treatment which have to take place during leisure hours so as not to interfere too much with their school work.

But apart from the impact which all these things have on leisure hours, handicapped youngsters have limited opportunities of associating with other people of their own age. True, most of the young people interviewed said that they had friends, but for some of them having friends their own age is an unattainable dream and most of their leisure activities are shared with adults only.

Friends will seldom call to see a person who is unable to go and visit them. If a young person is prevented by an orthopedic handicap from going out independently and is dependent on help from adults, this reduces his contacts with friends of his own age. Transport assistance has been a solution where some young people are concerned, while in other cases parents and relatives have provided transport. Whatever the arrangements, however, spontaneous contacts with friends are always difficult to achieve so long as one is dependent on others for getting out.

An important part of the project has involved talking to young persons about the extent to which they believe they need help or support in order to make their leisure more rewarding. This can relate both to transport and to the establishment of contacts so as to join clubs or participate in other youth activities.

Co-operation is often needed between various public authorities in order for handicapped youngsters to participate in the various resources which the community has provided for them. At present, this is left entirely to the handicapped individual and his family.

The co-operation referred to here concerns measures within the individual municipality, but it can sometimes involve measures elsewhere. If a handicapped person wishes to move to a new locality in order to take up employment, this calls among other things for suitable housing, access to the requisite services and adequate transport assistance arrangements.

The Social Insurance Service and, often, vocational rehabilitation authorities also have to be contacted in connection with a change of residential locality, and various social welfare departments in both municipalities have to be notified to prevent grants and supportive measures from "drying up". The rehabilitation clinic in the new residential locality will require a referral, and so on. All these various things frequently involve the individual person in dealings with 10 or 15 different people (see figure on page 32). What is more, responsibilities within the various departments are often divided between several departments and officials. Unfortunately, responsibilities for co-operation and co-ordination within the individual authority are not always clearly defined.

These difficulties are widely attested by many handicapped youngsters and their parents. Many questions of concern to the individual have remained unsolved due to the inadequate co-ordination of practical measures.

Desirable as it may be, co-ordination of the activities of different authorities is definitely not a practical proposition. If the liaison officer is placed at the disposal of these young persons, each handicapped individual can be piloted through the bureaucracy. Through his experience of several cases of a similar nature, a liaison officer can establish routines making it possible to devise new solutions to problems. In this way disabled youngsters can participate more in the resources which the community has intended for them.

Following consultations with the local rehabilitation units in the area concerned, the rehabilitation officers have been linked to the experiment as liaison officers.

### The Project

The 60 or so young persons taking part were selected in consultation with the rehabilitation advisors and local and regional rehabilitation units.

Following an initial mail shot, the young persons selected were contacted personally and given further information about the project. Appointments were then made for interviews with them and their parents. Since the project would occupy quite a considerable period, it was important for the young persons taking part to be told that they were free to discontinue their contact with the project team when they wished to do so. They could always return later on if they liked. One important part of the project was to help these young persons to feel that they are personally responsible for the measure needed to be taken. It was therefore important that they themselves should also decide the amount of dealings they wish to have with us.

Because of this freedom of choice, some young persons who at first were hesitant about taking part, joined the project. Most of the young persons made their decisions after talking the matter over with their families.

The project leader, together with the local liaison officers, visited and interviewed the young persons and their parents in their homes. On these occasions the young persons described their experiences of school and their plans for future education or employment. The interviews followed a set pattern, including questions about school, conditions at home, leisure, preferences concerning future education, employment etc.

Only a small number of the young persons interviewed stated that they had received any close guidance about planning PRYO. Only a few of the 60 youngsters taking part knew about the information material available at all schools on the subject of planning for employment and the future. They believed that extended PRYO was only available for school-fatigued or disruptive pupils. None of these young persons had been asked whether they needed any technical aid in connection with their intended PRYO period. Those who had personal assistants at school did not know whether their assistants were entitled and able to accompany them to their work experience locations.

Following consultations with the youngsters themselves, the school careers teacher or the SYO officer was contacted in each individual case. All of the persons thus approached were prepared to co-operate. Joint meetings were planned and held. The pupil and, if possible, his parents were always present on these occasions. Schools were represented by the pupil welfare team members who, in the opinion of the careers teacher, had an important part to play in planning. The project team was represented by the liaison officer and the project leader. The school situation of the individual pupil and aspects of future education and employment were discussed on these occasions, and various suggestions and solutions were jointly evolved by the participants.

All of these contacts were then followed up in telephone contacts with both school and pupil. In a number of instances it was also possible for the school advisor to attend, which was an advantage especially during the introductory phase of planning. His knowledge and experience concerning the availability of special solutions came in useful in several cases.

During the year, the liaison officers have kept in continuous touch with both school and pupils, so as to discuss and settle current issues. In some cases the school has suggested follow-up conferences together with the project team, while in other cases the initiative has come from parents or from the liaison officers.

Practically all the parents and young persons we met during our work on the project stated that in their opinion, young persons with orthopedic handicaps encounter more substantial difficulties in the transition between school and employment.

Many of the young persons themselves expressed concern at the risk of not getting a job on completing their education. At a time when job opportunities are in short supply for all young persons, employment prospects for the handicapped are felt to be extremely limited.

The overwhelming majority of the parents felt that the experimental arrangement of a liaison officer had been useful to the youngsters.

In the course of the project, only two young persons chose to discontinue their contacts with the project team, their reason being that they felt themselves to be so slightly handicapped that they did not require any special support for the time being.

Most of the other young persons have spontaneously declared that contact with the project team meant a great deal to them in the process of planning their future education or employment.

Most of the young persons involved in the project have been more or less regularly in touch with rehabilitation units. Some of them have had dealings with other specialists and many have received regular physiotherapy.

Routines for transfer to rehabilitation clinics or long-term care vary somewhat from one hospital management district to another, but in all cases the rehabilitation units lose touch with young persons somewhere between the ages of 18 and 20.

In the course of the project, contact has been maintained with the regional rehabilitation advisors. Co-operation arrangements have varied somewhat between the three experimental areas. In the County of Halland, the rehabilitation advisor has taken part in all visits to schools, and this participation has been of great benefit to the work of the project.

In the other areas, the rehabilitation advisor has arranged special in-service days for school staff who are to receive orthopedically handicapped pupils in their classes. Project personnel and rehabilitation staff have assisted on these occasions.

As the project has progressed, continuous reports have been transmitted between the rehabilitation advisors and the project team.

Co-operation between schools and the project team has run smoothly. Consultations have been held on one or more occasions concerning all the pupils involved in the project.

The arrangements for these consultations have varied, depending on local pupil welfare routines. On certain occasions the entire pupil welfare team has taken part, while on others only the SYO advisor and, where applicable, the class teacher have been involved.

The pupils preferred the latter arrangement. It has been easier for them to assert their views in a smaller group. Even if a pupil gets on well with everybody in the team, it can be rather daunting having to face ten adults on his own. Experience from the project has clearly shown that all planning for these young persons requires a great deal of time. The SYO advisers and careers teacher had to devote a great deal more time to these pupils than to others. The task of finding PRYO/PRAO opportunities requires both a knowledge of the potentialities and limitations of the young persons concerned and time in which to plan PRYO so that it will run smoothly for the individual.

A large number of the young persons taking part broached the idea of extended PRYO when talking to the pupil welfare team, and in most cases this was actually arranged.

As the project proceeded, it became increasingly apparent that the PRYO/PRAO period was of the utmost importance to this category of young persons. Only a small number of them were able to acquire work experience.

All planning for the transition between compulsory and upper secondary schools takes a lot of time and requires extra inputs. A certain amount of handling time was involved in obtaining finance for adjustment measures and approval for the procurement of technical aids. Accordingly, we have tried to begin planning upper secondary studies for young persons involved in this project about one term earlier than we begin making similar plans for other pupils.

In many cases, informal discussions were held between the school and the admissions board and also together with the receiving school, so as to facilitate the transition.

In the case of pupils whose handicaps require extra measures, a "PRYO week" was often arranged at the receiving school so as to give the pupil and the receiving staff an opportunity of talking things over.

#### Summing up

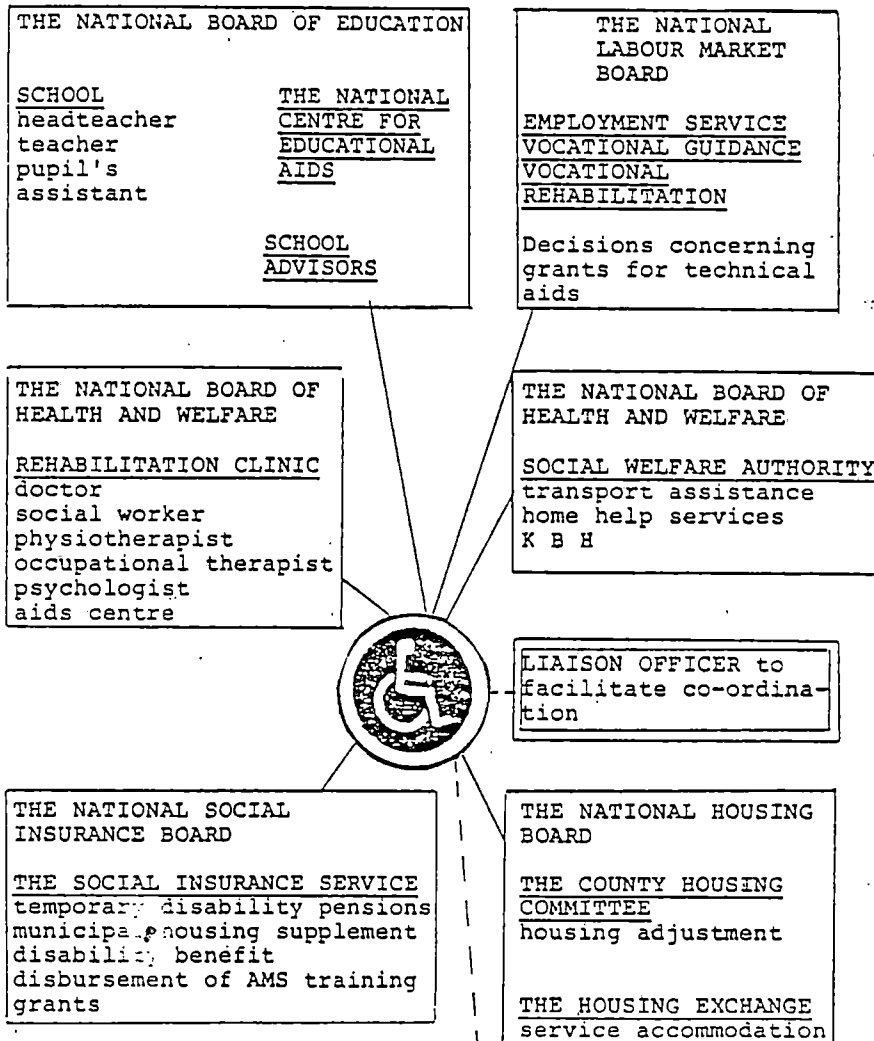
In the course of the project, we have not come across any organised co-operation between schools and vocational rehabilitation services where handicapped youngsters are concerned. Several of these young persons will in all probability be dependent on vocational rehabilitation resources later on.

According to the description of the project, these activities were expected to make young persons with orthopedic handicaps more prepared for independent living, employment and occupation. The liaison officer, together with the relevant parties, was to take the necessary steps to this end and assist teachers and others in devising means of overcoming problems connected with the integration of orthopedically handicapped pupils.

The reaction we have met from young persons and parents clearly shows that a liaison officer is needed. The experience gained in working together with schools, rehabilitation units and vocational rehabilitation services has shown the model for this work included in the project plan to be viable.

Today, the project is finished. However, in the county councils where the project has been carried on, the work has been made permanent. The permanent organisation is worked out somewhat differently, but the working method and the philosophy are the same as in the project. In the new organisation, the liaison officer has had access to help from occupational therapists and physiotherapists as well.

C O N T A C T S   N E E D E D   B Y   A   P U P I L



H A B I L I T A T I O N   -   S C H O O L

doctor, social worker, physiotherapist, occupational therapist, teacher, psychologist, care staff, parent

## ACCOMPANYING SERVICES IN FRANCE

### REHABILITATION FOLLOW-UP TEAMS

by

Thibault Lambert

#### Introduction

Co-ordination and management issues were shown to be of particular importance during the OECD/CERI project on transition. How were the contributions of different government departments and voluntary agencies made known to young people and their families and put together in a coherent package to facilitate access to training for employment and independent living?

In France, the Commission technique d'orientation et de reclassement professionnel (COTOREP) -- Technical Commission for Orientation and Professional Rehabilitation -- in each département (administrative territorial division) offered an interesting model. One of the services available to the Commission is the Equipe de préparation et de suivi du reclassement (EPSR) -- Team for the Preparation and Follow-up to Rehabilitation. This paper looks at follow-up services with particular emphasis on the work of EPSR teams.

#### Transition

The period of transition from school to vocational training and employment is a sensitive one, particularly for young people who are handicapped. The activities of the many agencies need to be more closely co-ordinated by persons or groups who act as guides to accompany individuals and their families through transition. This guidance should not be confined to vocational training and employment but should seek to open up opportunities for social interaction which result in true integration.

#### The French Context

Two commissions were set up at the département level in 1975 to be responsible for arranging and co-ordinating provision and services for children, young people and adults who are considered to be handicapped.

The Commission d'éducation spéciale (CDES) is responsible for planning services, considering the assessed needs of children and young people who require special education and sanctioning or making educational and other arrangements to meet them. The commission is responsible for all such arrangements for individuals up to the age of 20. It delegates its powers to two sub-commissions, one for the pre-school and elementary stages, and the other for the secondary stage.

The second commission is the Commission technique d'orientation et de reclassement professionnel (COTOREP). It is responsible for individuals over the age of 20 and develops programmes which include employment, sheltered work, alternatives to work and other facilities and services. The commission also decides who is to be accorded invalidity status and the pensions they are to receive. It thus has a profound influence on the future lives of young people with significant disabilities.

Two considerations need to be borne in mind. First a great deal of provision of all kinds, including education and vocational training is carried out by voluntary associations and agencies which are subsidised by the State social security system. Secondly, there may be a gap, in practice, between the work of the commissions when young people with special educational needs leave the regular school at 16 and do not enter any form of continuing education or training.

#### **Follow-up Services**

Within the ambience of the two commissions, three kinds of services carry out a guidance role in different ways. The criteria which distinguish them are:

- whether they specialise in employment, social integration or both;
- whether they are linked to an establishment or not. Some facilities for those who are disabled have their own follow-up services. Other agencies have been set up specifically for follow-up work;
- the age range for which they provide a service. Some services help clients of all ages while others concentrate on the needs of adolescents;
- the legal status of the service. Not all services are liable to regulation. Some have an unofficial status being financed from within the general budgets of establishments. Only one service, the EPSR, is subject to specific regulations.

#### **a) Establishment-linked Follow-up Services**

These have no official status and are limited to three years after children and adolescents leave an institution (Statutory Order 56-284 of March 1956, Annex 24, Article 32). These activities are "subordinated to other initiatives" in the sense that they are not always given priority.

There are different kinds of establishments with such services and it is necessary to distinguish between disabilities; for instance, medico-professional institutes (IMPRO) provide for young people with marked intellectual disabilities up to the age of 20 and in some cases beyond. Some of them have their own follow-up services and this kind of institute is a particularly good example where on average 38 per cent of those who attend are placed and supported in ordinary employment.

Young people with physical and sensory disabilities either attend specialised rehabilitation centres for particular disabilities or general rehabilitation centres. These centres are concerned with direct placement and leave longer-term follow-up and integration to the EPSR.

#### **b) Independent Guidance and Support Services**

These are created by associations for the disabled to deal specifically with the social integration of individuals.

#### **c) EPSRs**

These are regulated and are one of a number of services for the adolescent age group. Regulations, orders and circulars in 1975, 1978 and 1979 defined their role, structure and finance. EPSR teams are multi-disciplinary teams to support people who are handicapped and enable them to achieve a stable social and professional life. They participate in every stage of the integration process. They are concerned with transport, housing, psychological preparation and rehabilitation.

#### **EPSR Services**

##### **i) Among the tasks of the teams are**

- to provide individuals with information relevant to rehabilitation;
- to improve vocational and professional competence by arranging for placements in training institutions, sheltered workshops and in work;
- to give vocational guidance and support in employment;
- to work in industry and commerce to inform managers and workers of the potential of handicapped persons and to seek positions for them;
- to establish a dialogue with other professionals about appropriate services and programmes.

## ii) The structure of EPSR services

There are two kinds of teams, those which have public status and those which have private associative status. Public teams have a minimum of two members, a placement officer and a social worker. They may also have a member for secretarial and information work and a receptionist. Private teams are often made up of four or five persons with similar functions.

Teams have recourse to psychologists, speech and other therapists of all kinds, who can be paid on a sessional basis up to the equivalent of a full-time worker.

EPSRs are set up by the département Head for Work and Employment (DDTE) and public teams are fully financed. Private teams receive up to a maximum 75 per cent grant and must raise the rest of their finance from other public and private agencies.

## iii) Statistics

There are 73 EPSRs of which 50 are public and 23 are private. They cover 70 départements with both public and private teams in three of them.

Figures from about twelve teams show that they have more than doubled their number of clients between 1980 and 1985. Two-thirds of them were men and one-third were young people between the ages of 18 and 25. Disabilities were predominantly physical and sensory but about one-third were intellectual disabilities or psychiatric conditions. Approximately 10 per cent of clients had multiple disabilities. Their general education level was limited with only one-third of all applicants having a general education leaving certificate.

Just under half of the applicants underwent rehabilitation and of these 84 per cent obtained open employment, 5 per cent received vocational training and 11 per cent entered sheltered workshops. Other applicants received careers guidance, help with housing, transport or leisure activities, family support and other forms of help.

## The activities of the EPSR

It should be recognised that the COTOREP only directs individuals to the team if there is a theoretical likelihood of obtaining employment. The major activities of the teams are preparation, placement and follow-up. Much of the work involves complementing vocational and professional training with work on the social aspects of transition.

### i) Preparation

A programme is prepared, with client co-operation and agreement, for each individual. This aims at social and work independence. The planning involves a number of activities such as discussions, exchanges of information and collaboration with local agencies.

Among different aspects of preparation the following are emphasized:

- Psychological preparation which aims to help the individual gain confidence, get rid of psychological blocks and make a dynamic readjustment to his or her disability;
- Social preparation which aims to clarify administrative matters such as pensions and benefit claims and establish status as a person seeking employment. This aspect is to enable individuals to have financial resources, housing, help, where necessary with self-care, and information about rights and needs and thus be in a position to look for a job;
- Preparation for employment which may include short preparation courses (15 days) for those who have never worked and courses in sheltered workshops which are institutions for the vocational training of disabled young people. This also includes making use of measures which facilitate the employment of the young people concerned and helping them to present themselves and write curriculum vitae.
- Preparation for independence which includes independent travel, finding one's way about in the community and independence from the family.

## ii) Placement

The work of the team includes particular attention to identifying and preparing places in different enterprises. First, there is the need for a knowledge of employment conditions in the area. Then there is an approach to management which will involve explaining disabilities and illustrating potential to work. There will next be information about all the financial and other support arrangements available to employers, including modification of the workplace. Finally the contacts must be personal and those offered for employment must be well prepared.

## iii) Follow-up

Two aspects of follow-up are equally important:

- Employment follow-up. After placement frequent contacts are maintained with the employer and those in the work situation to deal with difficulties which may arise. This guarantee of a regular follow-up and help with difficulties when they occur is significant in maintaining employment. It may for a short period of months but also, in some cases, for several years. It may take the form of telephone calls, visits and further work with clients.
- Social follow-up. This will involve the team social worker in seeing whether the support network for independent living is appropriate, is working or needs to be modified.

## Conclusion

Although EPSR services provide for many young people, there is no systematic follow-up to education and training for many other young people with disabilities. The beginning of some co-ordination between institutions and EPSR follow-up arrangements is evident. A great deal still depends on the interest and good will of the establishment from which a young person leaves, usually a medico-professional institute or rehabilitation centre, in referring individuals to follow-up services and on the ability of those services, particularly EPSR teams, to respond effectively.

DEVELOPING INDIVIDUAL SERVICE PLANS  
FOR PEOPLE WITH SEVERE DISABILITIES, MANCHESTER, UNITED KINGDOM  
TRANSITION FROM SCHOOL TO COLLEGE .

by

Mick Molloy

This report is about individual planning services for young people with disabilities. It gives a short presentation of Manchester City followed by some insight into policy in the area of services. The "public's" perspective on the disability issue is discussed in one section and the general ways in which educationalists can respond to those perspectives. A framework for transition from school to college or adult life and a personal plan that enabled one young man to attend his local college are also presented here.

#### The City of Manchester

The City has a population of about 460 000. The levels of disadvantage and deprivation are high, with many families living below the poverty line in terms of modern definitions of poverty. In some parts of the City well over 50 per cent of families are below that line.

The national rate of unemployment in 1988 was 11.9 per cent; for the North West region of England it was 14 per cent, and for the City of Manchester 21.1 per cent. In central areas of the City, the statistics indicate that 45 per cent of all males were unemployed. Only a small percentage of youngsters who leave school at 16 enter permanent employment. In 1987, 13 per cent of pupils from mainstream schools went into permanent jobs and 28 per cent continued their education largely in colleges. The rest went on to Youth Training Schemes for 18 months or to the unemployment register. Of the 316 pupils who left special schools, only eight went into permanent employment (2.5 per cent).

All these characteristics have implications for the way the City Council provides and delivers services. The demands for educational services has increased as a result of changes in age structure, unemployment levels and social characteristics at the same time as the resource base has special problems. However, this recognition does not extend to providing sufficient financial resources to tackle them.

### Post-16 Educational Services for Disabled People in Manchester

In March 1987 a report on the Development of the Post-16 Provision for Disabled People went to Manchester Education Committee. This report requested:

- i) more care supporters (two per year over the next five years);
- ii) funding for youth workers to ensure that disabled youngsters are integrated into youth clubs;
- iii) additional funding to enable the twenty or so young people with profound mental handicap who leave special school each year to remain in education after they are 19 and probably until they are 21; and
- iv) a systematic building programme to create more barrier-free environments in our colleges.

These issues are being tackled. If progress is slow it is now clear what is required in this area.

The City Council has a policy on "Recruitment and Selection". This is there to ensure that not only do job descriptions accurately reflect the jobs that have to be done, but that the process of selection is as free of subjective bias as possible. Implied in this process is that more people from minority groups will gain jobs and careers in local government. There is also a policy statement entitled "Equal Opportunity in Employment -- A Policy Statement."

Policy statements at the level of intention are of little use if they are not effective. It is therefore important to note that:

- i) a national legal framework which states that learning alongside peers in mainstream schools should be the first choice for disabled pupils;
- ii) a growing number of children, and young people, with significant disabilities are now in mainstream education;
- iii) more parents want to see their disabled children learning alongside their non-disabled peers;
- iv) children and young people with mental handicap spend some of their time learning alongside their mainstream peers;
- v) 20 per cent of pupils are leaving special schools at compulsory school leaving age (16 years) and going into Post-16 Education in integrated settings;
- vi) some disabled youngsters attend their local youth clubs;

- vii) disabled adults attend integrated adult provision;
- viii) deaf people plea to maintain separate provision for them so their sign language will not disappear; deaf people want to train to be tutors in adult education;
- ix) there is a growing minority of disabled people in paid employment in the Local Education Authority; and
- x) there is a will of elected Councillors to see more integration take place and emergent policies and strategies that ensure there is a commitment to this happening.

Whilst developments are slow, most disabled pupils and students usually say that they wish to remain in integrated settings once there. If integration is a process, and not a state, then the more we learn how to support disabled pupils and students in open settings, the more our educational services will develop.

#### **What Many of us Take for Granted about Disabled People**

An appropriate definition of handicap to start with for the purpose of this report is outlined in an OECD/CERI paper which states:

"One specific aspect of policies bears on the distinction between disability and handicap. This is best illustrated by an example. A young person with a physical or sensory disability may not be able to operate a machine in industry as it is produced for the ordinary employee. However, with today's technology it may be possible to modify its operation so that the disabled individual can use it as effectively as other operators. Failure to make the modifications turns the disability into a handicap. It seems, therefore, important to recognise in all the major fields of education, social welfare and employment, that policies which do not include appropriate situational modifications play their part in increasing the handicapping effects of disabilities and will influence the size of the group described as handicapped."

Generalised definitions of the term "handicap" or "disability" are always inadequate because of the many different situations commonly regarded as "handicapping" or "disabling". Numerous differences exist amongst us all, but these differences are not usually experienced as personal "penalties". It is only when the value attached to the difference by others and society in general is a negative one that this tends to happen. This, sadly, would appear to be a widespread phenomenon and not merely one that is particular to people with visible disabilities.

Educational services have in the past required many disabled young people to leave their usual surroundings and go where the services are provided. That is still widely prevalent. Children and young people go away from home to special residential schools, often in other parts of the country. Many of us, traditionally, have had very low expectations for these pupils and students. Services to them have often relied on the use of "special" buildings

on one campus, in which the "special" needs of those young people are supposedly met. Segregation of disabled people whatever their age from non-disabled people carries a number of costs for those segregated:

- i) it is sometimes suggested that special "assessment and treatment units" are required. However, the very process of removing a young person from his/her usual setting (the mainstream setting) removes the opportunity to observe and analyse the interaction between the person and his/her environment. Artificial environments should be avoided if at all possible;
- ii) once segregated, opportunities to learn how to adapt to living in the person's local community are drastically reduced;
- iii) segregation makes it difficult to reintroduce a person to less restrictive settings;
- iv) personal relationships, with family, friends, neighbours, are usually disrupted by segregation and can become difficult to re-establish;
- v) segregation often reduces the opportunities to learn appropriate behavior from non-disabled peers;
- vi) there is a danger of segregated settings being used unnecessarily because staff in ordinary settings may become less able or willing to serve people who present a challenge when they know that alternatives exist; and
- vii) segregation, per se, contributes to a damaging fall of self-esteem.

Why are disabled people as a group devalued? Why do we seek to reinforce their own doubts? These are not easy questions to answer, but along with the issues to do with the way services are designed, answers are probably to be found in the distorted mental images most of us hold, and the bias in those images against disabled people being valued as competent members of society.

#### **Positive Ways to Respond**

One major challenge is to develop service provision that meets people's needs, young or old, in an individual way. The way in which services are provided can inhibit or enhance personal freedom and choice. It is, in the first place, important to ensure that a disabled person has the correct blend of support to sustain a life in the open community. Rarely does one come across a service with aims that recognise the importance to the individual of community participation, but unless a service consciously works to such an aim it is likely that it will quickly develop into a place where disabled people go rather than a service which supports them in their daily living. Once separate service has been established, even if it originally did have clear aims, it can begin to assume a logic of its own.

A powerful way of improving service design is to give the people who deliver services the opportunity to become more aware of the implications of their actions on the people they serve. Specific aims could be to:

- i) develop staff awareness and understanding of the needs of disabled students;
- ii) examine some typical institutional constraints; and
- iii) promote development of student awareness of disability through the tutorial system.

Another way is to give senior staff the opportunity to become directly involved in supporting a disabled person doing routine things in the community.

Planning personal services can benefit people at three different levels within the system:

- i) disabled people have a better chance of getting what they need if a well-written statement specifies the forms, extent and frequency of various interventions needed;
- ii) providers know exactly what services they should be providing and in what way they need to be provided; and
- iii) those paying are able to specify exactly what they expect as outcomes for each service used.

The chances of achieving effective and efficient services are much greater with this approach because there is a mechanism to measure whether or not the expected service is being delivered for a specific amount of money and effort. If personal planning is not viewed as an essential function, providers will continue to operate as they usually do now. A disabled person's needs come to be defined as what a provider has available, not what a person requires to lead a full life.

It is not unusual to find a variety of specific services for disabled people with no arrangements for evaluating their combined effort. Typically the means of "getting on the road" assumes more importance for the planner than where one is going. Whilst the processes and structures of planning are important, these will not necessarily determine the direction planning takes. This is set by the principles used in drawing up plans. It would, for instance, be possible to make a personal plan for someone which excluded more than promoted her/his participation in the community. It is very important to be clear about the principles which are used, and, as the plan unfolds, continue to make sure there is a match between principles, process and outcomes. Everyone should have at least a basic entitlement to:

- i) a presence in the community;
- ii) opportunities to participate in community life;
- iii) experiences that make us more competent;

- iv) situation where we make choices; and
- v) respect and status.

This is what is needed in working with each disabled person requiring additional support.

#### **Guidelines for Transition from School to Adolescent/Adult Life**

In England and Wales the 1981 Education Act and the Special Educational Needs Regulations, 1983, require an annual review of the Statement of Special Educational Needs compiled for individual pupils. Although reflecting the statutory position in England and Wales, the principles are capable of general application. The annual review should be part of the series of a school's planned involvements with parents, seeking to promote confident relationships and full participation by them in the education of their children. The involvement of a young person in the decision-making process is important although there is no statutory provision under the 1981 Education Act for this to happen. The presence of a young person at a review as he/she gets older is desirable. The wishes of the young person should, and those of the parents must, be taken into consideration.

The following procedure creates a framework for leavers' reviews based on legislation and good practice in many special schools in the United Kingdom.

##### **i) First stage**

There should be a formal process which initiates the pre-leavers' assessment for every pupil for whom a Statement of Special Educational Need is maintained in mainstream or special schools. This should commence in the academic year in which a pupil is fourteen. In England and Wales under the 1981 Education Act a local education authority has a statutory responsibility to carry out a mandatory reassessment during the period of twelve months beginning with the day on which a pupil attains the age of thirteen years and six months.

- a) Mandatory reassessment must involve the parents from the outset and use the full procedure laid down in Section 5 of the 1981 Education Act, thus enabling parents to submit written comments or make oral comments which the authority must record. As a prelude to this, it is useful to invite parents, by letter, to the school to discuss the information available to the school with the head teacher. The parents should have the option of involving their child in this discussion. At this meeting:

- the pupil's files should be available for perusal;
- it should be explained that the information has been supplied by professionals from several disciplines;
- the general options apparently open to the pupil should be discussed. A variety of pertinent information brochures, careers

leaflets, prospectuses and details of local employment which reflect the options should be given to the parents. Appropriate points of contact (e.g. Careers Officer, Principal of Post-16 establishments) should be given so that parents and the pupil can follow up the options presented; and

-- parents and the pupil should be given the opportunity to make their own suggestions and the head teacher should endeavour to suggest appropriate points of contact for further information where appropriate.

- b) Towards the end of the school year there should be an open evening for pupils of this age cohort and their parents. This open evening should have contributions from the Careers Service, providers of a local post-16 provision and the multi-disciplinary team attached to the school and give parents and pupils the opportunity to deepen their knowledge of post-school facilities.

#### ii) Second stage

In the year in which a pupil is fifteen a review should take place, usually not later than the spring term. The purpose of this is to plan with more certainty the future course for the pupil, allowing sufficient time for special provision to be arranged.

- a) Whilst the review might include all those included the previous year, in addition to professionals requested to attend by parents, the cost implications need to be borne in mind. Selection by parents and head teacher is important; for instance, it is now that the health visitor could be involved. She/he can contribute to the assessment and planning for the future by indicating whether or not her/his services, or those of her/his district nursing colleagues, would be appropriate.
- b) More specific plans should be drawn up.
- c) Should it be considered that there is an eventual need for provision not currently available, this is the time at which such a recommendation should be brought to the notice of the Chief education officer. The likelihood that such a recommendation is to be made, and the reason for it, should be drawn to the attention of local colleges to ensure that every opportunity to secure appropriate local provision has been pursued.

#### iii) Third stage

A review should take place in the autumn or spring term in the year in which a pupil is sixteen. The purpose of this review should be to:

- a) monitor progress;
- b) amend recommendations if necessary;

- c) evaluate work experience placements; these can serve the dual function as a "taster" for the young person and a further platform for assessment; and
- d) finalise plans or suggest further schooling.

Such a framework is important to ensure that the process of planning actually takes place for each pupil.

In July 1986 a new Act of Parliament received the Royal Assent. This is the Disabled Persons Act 1986. Section 3 of that act is intended to help bridge the gap which many disabled young people find on leaving school. It requires local education authorities to notify Social Services Department of all children aged 14 and over who have Statements of Special Education Needs, at a certain specified time. Those young people concerned must then subsequently be again notified to the Social Services Department nine months before they are expected to leave school so that their needs in relation to other statutory services can be determined. These services in England and Wales are those that are principally available under the Chronically Sick and Disabled Persons Act 1970; these include the provision of recreational activities, television, home helps, travelling assistance, and holidays. Section 5 of the 1986 Act has just come into operation and will affect for the first time all pupils who reach their 16th birthday in the academic year 1990-1991. It remains to be seen how effective this act will be; there is a clear intention, however, to develop closer co-operation between the work of the Education Department and the Social Services Department and this must be welcomed.

#### **A Personal Service Plan for Transition from School to College Life**

The general backbone of a plan is simple. It follows the outline given in the Education (Special Educational Needs) Regulations 1983 mentioned previously. It is based on reinforcing the ordinary life model and gives:

- a) a description of the person's unique needs;
- b) the resources required to meet the needs; and
- c) an indication of how the resources can be secured.

This particular plan for Paul was produced with Paul and his parents to help him transfer from a segregated residential school setting to an ordinary college of further education. The plan answers four essential questions:

- a) What are Paul's needs?
- b) What educational provision needs to be made to meet those needs?
- c) What additional non-educational provision should be made?
- d) Where is the most appropriate place for his educational needs to be met?

The plan is drawn from a real case study. The procedure outlined above was followed, but since Paul was attending a residential school in the south of England (some 300 miles away!), Manchester LEA arranged the meetings. They took place largely in Paul's own home, when he was on vacation, and his local college.

#### **Paul's general needs**

Paul is in his final term of compulsory education (16 years). He attends a residential school outside Manchester and has indicated his preference to pursue education until he is 19 years old. He has said that he would like this to be at his local college and, as far as possible, with non-disabled people. He and his parents have decided that for this period at least he should live at home.

Paul is a lively outgoing person whose general abilities and interests are much the same as most young people of his own age. He is a person with athetoid cerebral palsy and as a result of this his motor functions are grossly impaired. He uses a wheelchair and requires support when transferring to and from, and to propel it, unless it is electric and even then he has not had experience of moving independently any great distances. It is likely that he will not use public transport. He does travel in a car, provided the support to lift him in and out is there, but he cannot sit unaided and someone has to support him. There is no reason why he cannot use a taxi provided the support is there.

#### **His communication needs**

Paul understands everything that is said to him but others have great difficulty understanding what he says due to his impaired articulation. They must be prepared to listen and use contextual cues. He is patient and very tolerant of others. This helps a great deal as does his sense of humour.

#### **His educational needs**

- a) Paul's attainments in the basic skills of literacy and numeracy, although not low, are at the hesitant stage. He requires practice and support to develop fluency. He has the cognitive ability to write, but his hand movements are severely impaired and he cannot write in the conventional sense. He will therefore require an alternative method of writing. He can type, but the typewriter he uses, an IBM Golfball, hides the print from view. A typewriter with a visual display unit would alleviate this difficulty. Once Paul attends college, tutors should begin to explore with him the potential of the microprocessor as a tool for writing.
- b) Paul is also interested in Art, French, Astronomy and Computer studies. He has had little opportunity to experience the resources in his own community and has said that he would like a course to help him achieve this.

### **The education provision to meet Paul's needs**

Paul should, in the first instance, attend a twelve-month bridging course at his local college. His personal plan should aim to:

- a) increase his participation in his local community;
- b) offer him experiences that will make him more independent; and
- c) prepare him for an open college situation.

Within the existing college structure Paul's needs can be met with the following blend of provision:

- a) A third of his timetable with the special needs group with opportunities for:
  - Problem-solving learning;
  - Participating in discussion groups on social and life skills training; and
  - Experiencing community facilities.
- b) A third of his timetable in open classes related to:
  - Typing;
  - Using microprocessors;
  - Art;
  - Geography; and
  - English and Maths through adult literacy groups.
- c) A third of his timetable with his support worker in relation to:
  - Exploration of personal aids;
  - Using the local community; and
  - Independence and personal effectiveness training.

### **Non-educational provision for Paul**

Paul will require the following non-educational provision to meet his needs:

- a) Personal support: in the first instance a 12-month appointment of a personal supporter for:
  - Open classes;
  - Community settings; and
  - Specialist classes.

This should be provided by his local college. The cost will be reimbursed to the college by the Education Department.

- b) Transport: Paul will be able to use the college transport for disabled people mornings and evenings. He will also require an allowance to allow him to experience his wider community during the year. This money should be paid to his local college by the Education Department, and will probably be used to purchase taxi time to transport Paul and his supporter into the wider community.
- c) Communication aids: The provision to meet Paul's needs in this area has been explored by specialists from the district health authority. Paul will initially require equipment from the following sources:
- Education Department: Brother printer EP22 and a photonic wand, both purchased by the Education Department, but remaining the property of Manchester Education Committee when Paul finishes his course. This equipment is for use in college;
  - Department of Health and Social Security: Paul will require similar equipment for personal use at home. This should be pursued through his consultant at Booth Hall Children's Hospital.
- d) Physiotherapy: Paul should receive termly supervision by the community physiotherapist from the district health authority. This provision should:
- Assist him with his exercises;
  - Help his parents to support him in his exercises; and
  - Offer training to his personal supporter.
- e) Physical and financial support: Paul will also require assistance from the Social Services Department in the following areas:
- His home will require modifications to allow him to live with increasing independence. Paul has not lived at home regularly since he was twelve;
  - Financial benefits on change of status due to age, especially in relation to Requirement Regulations Schedule 4, paragraph 18 (claims for a permanent helper);
  - Independence aids within his home and also in relation to communication aids that cannot be provided by Department of Health and Social Security; and
  - Ensuring that personal support is available to him to pursue his interests after he leaves college.

#### Reviews of Paul's personal plan

The first review of this plan should take place after the first half-term. It should look at how accurately the picture of Paul's needs is and how well the services respond to them.

## Conclusions

The central message of this report is that people with very complicated disabilities can participate in the mainstream of society, if we look closely at the way we deliver the supporting services and ensure that they do support people rather than segregate them. This tends not to happen when "packages" of service provision are based on the institutional model. In the original letter, and not untypically, that was received from the Careers Officer about Paul, many negative stereotypes were used such as: coping with someone (a difficult person); use of term "boy" for a person who is sixteen years old (a child image); removed from his school (segregation); "X" school with all its resources (institutional model of service delivery); and hold out for "Y" college (despair).

What happened to Paul? What about the evaluation? Shortly after Paul had started at college, I moved to another job. The next time I saw him was a year later when he attended a conference as a student delegate on issues to do with disabled students. We spoke briefly and he told me that he was settling into college life. I asked him to keep in touch. About a year later I received a letter done on his own personal computer:

"When I started at Abraham Moss back in 1984 I was on the bridging course, I found the work on the course easy and was not really learning anything and sometimes I got quite bored.

Then in October my tutor got me into some part-time Maths and English classes, in the basic skills area, even though it was only a couple of hours a week I was using my brain more.

In January 1985 I started the 21-hour course doing Maths and English in basic skills. Also I do other studies which are Computers, Social studies and I.E. (Instrumental Enrichment).

Next year I am going onto the CFE (Certificate of Further Education) course which is a one-year examination course and includes the following subjects -- Maths, English, Computers, Social Studies and Human Biology, plus French and other subjects to make up the hours."

The point about things being too easy is interesting but Paul was now in an environment where people could respond to that. He had more control over his own studies. Two years after that, I received another letter from Paul. It said:

"I am still at Abraham Moss studying Basic Maths, Basic English and Sociology at GCSE. At the beginning of the academic year I started on the GCSE English but found the level too high. I hope I will be doing GSCE Maths and English next year.

For my sociology I have to do a piece of work in which I have to find information by a number of different sources, such as interviews and questionnaires.

I have decided to do my piece of work about educating the physically handicapped and I wondered if it would be possible for me to interview you on this subject.

I would be very grateful if you could spare the time and it would help me a lot."

That letter speaks for itself. Paul was about to evaluate what I do.

Paul is still pursuing a college course in an open environment. He very firmly wanted to come home and receive his education in his own community. The way forward must be to think positively with individuals about their desirable futures and help them plan them. A starting point might be to suggest that every college should not be allowed to refuse admission to a disabled student other than on the following proven grounds:

- Course is full and there is not an alternative acceptable to the student;
- Prospective student is not qualified for course;
- The degree of personal support required by the student is not available;
- The student does not have the necessary personal aids to have access to the course material;
- The physical barriers on site will make movement in important areas impossible for the student;
- The student could not get to college because no transport is available; and
- That such modifications as might reasonably be made within the college to remove the grounds for refusal have been examined.

Colleges should be rigorous in this approach and should actively assist intending students with counselling or refer them to an appropriate support agency. Analysis of this information will help local authorities with the planning for future resources.

This individual example is a summary of principles put into practice which exemplifies what can be done, even in difficult circumstances, if objectives are clear and actively pursued.

## CASE MANAGEMENT IN THE UNITED STATES

by

Ruth Luckasson

The phrase "case management" is used frequently in the United States by individuals in the human service fields. Generally the phrase appears to carry a positive connotation, but its use by many human service workers is often accompanied by an expression of disappointment that case management "does not work as well as it should". Further questioning rarely yields specifics about either the precise definition of case management, why it does not work, or what we could do to improve it. It is as though everything about case management is supposed to be self-evident. But of course it is not.

This report will attempt to analyse some of the case management issues that have arisen in the United States and perhaps provide some useful counterpoints for discussion of the international experience. Regrettably, little empirical or qualitative research has been conducted on case management in the United States. With few exceptions, the writing in the area consists primarily of reports on funded projects, training handbooks, and descriptions of how case management ought to be conducted and what it ought to accomplish. Since much of this literature is unpublished, it is frequently not peer-reviewed, and it is difficult to collect. My own literature search was most fruitful when I was able to personally contact authors who then generously shared their collections with me. For an excellent compilation of literature on the subject, the reader is referred to the bibliography.

The report will begin with a description of the evolution of case management in the United States. Next, it will survey the primary definitions of the phrase and attempt to distill the common themes running through the definitions. It goes on to discuss issues affecting implementation, such as direction, independence, authority, caseload, training, and job satisfaction. Finally, some state-by-state descriptions of case management will be reviewed. Since a convenient access to many of the referenced materials was difficult, excerpts from documents that may suggest useful starting points for discussion were provided.

### The Evolution of Case Management

Reviewing the history of the principle of case management in social services suggests that it is not an invention of the 1980s. The idea emerged

early in United States attempts to assist individuals by providing social services. A pioneer of American social work practice, Mary Richmond, emphasized as early as 1922 the importance of what she termed "indirect action" (Richmond, 1922) but what we would probably call case management: "Indirect action through many parts of the social environment -- through other persons, through institutions and agencies, through material things -- though not the only approach of the social case worker, is more exclusively within his field than are some of the other approaches (i.e. counselling) I have mentioned".

Case management has been rediscovered periodically since then, by different professions, often by different disability groups, and frequently as components of different social policies. For example, the early 1970s saw a modern manifestation of case management principles when Elliot Richardson, then Secretary of Health, Education and Welfare under President Nixon, issued a memorandum entitled "Services Integration: Next Steps". Federally-funded services integration projects, the Services Integration Targets of Opportunity (SITO) Projects, were begun in order to establish interagency linkages among human service programmes. The goal was to reduce the dependency of individuals on welfare who had multiple problems by providing: "a) the co-ordinated delivery of services for the greatest benefit to the people; b) a holistic approach to the individual and family unit; c) the provision of a comprehensive range of services locally; and d) the rational allocation of resources at the local level so as to be responsive to local needs." (Richardson, 1971, reported in Caragonne and Austin, n.d.). Recently, The New York Times discovered case management. An editorial heralded a "bold" alteration to mental health care delivery -- a corps of "case managers" to address the needs of people with mental illness. "The experiment deserves local approval and national attention." (Mental Health on the Street, 1988, p. 22). There must be something about the social problems of individuals and the idea of case management that accounts for its appeal, longevity and adaptability.

Case management appears to have taken root in the modern developmental disabilities field with the birth of de-institutionalisation and the philosophical commitment to providing services consistent with the principles of least intrusion and least restriction. As individuals with developmental disabilities left total-care facilities and began to confront the complexities of a scattered service system, it became clear that most of these individuals would require assistance to create the service package indicated by their needs. At the same time, people with disabilities began to assert their autonomy and decision-making powers, creating a self-advocacy movement. Urging that they be treated as "consumers", self-advocates promoted a shift in the balance of power, recasting human service workers as the employees of the people who have the disabilities, and demanding that decision-making power be in the hands of the disabled person rather than the worker. Given the very real disabilities that self-advocates experience, assistance in the form of a case manager was essential to fulfill the client's intentions and assist him or her in negotiating the complex and often fragmented service system. It has been suggested that increased emphasis on case management generally accompanies theoretical shifts from attempting to change the individual through clinical services to attempting social change of the individual's environment through social manipulation (National Association of Social Workers, 1984).

A related interpretation has been offered. Perhaps after total-care institutions no longer provided the point of accountability for the lives of people with disabilities, it became necessary to designate an alternative point of accountability. A single-service institution could not be held responsible since the needs of people with developmental disabilities require wide-ranging services from many types of service providers. Thus, designating a person, rather than an institution, as the point of accountability satisfied the system's need for pinpointed responsibility. Case managers fulfilled this role.

The phrase "case management" has not been without criticism. The primary objection is that an individual is not a "case" to be "managed". While accepting the sensitive nature of the objection, for ease of communication this report will use the phrase.

### What is a Case Manager?

One way to analyse the definition and function of a case manager in the United States is to review the legal mandates for this service and the responses from relevant professional groups. Case management has been described and mandated in many official directives including federal laws, state laws, and court cases, and by professionals in the human services fields. Some examples follow.

The federal Developmentally Disabled Assistance and Bill of Rights Act, major legislation in the disabilities area, was passed in 1975 as an amendment to the Developmental Disabilities Services and Facilities Construction Act. Its purposes were to expand federal assistance to assure that all persons with developmental disabilities receive the services and opportunities necessary to enable them to achieve their maximum potential through increased independence, productivity, and integration into the community; to enhance the role of their families in assisting the person to achieve maximum potential; and to support a system in each state to protect the human and legal rights of persons with developmental disabilities (the state "protection and advocacy" systems, 42 USC 6000 et seq.). The statute designates case management as a priority area and defines it as:

"activities to establish a potentially life-long, goal-oriented process for co-ordinating the range of assistance needed by persons with developmental disabilities and their families, which is designed to assure accessibility, continuity of supports and services, and accountability and to ensure that the maximum potential of persons with developmental disabilities for independence, productivity, and integration into the community is attained." [42 USC 60001(16'), P.L. 100-146, sec. 102].

Another major disability law, the federal Rehabilitation Act of 1973 (29 USC 701 et seq., P.L. 93-516), was designed to develop and implement, through research, training, services, and the guarantee of equal opportunity, comprehensive and co-ordinated programmes of vocational rehabilitation and independent living. It requires that each consumer be served according to the Individualised Written Rehabilitation Plan. Among the services included by the Act are case management services, "counseling, guidance, referral, and

placement services for individuals with handicaps, including follow-up, follow-along, and specific post employment services necessary to assist such individuals to maintain or regain employment, and other services designed to help individuals with handicaps secure needed services from other agencies, where such services are not available under this act." [29 USC 723(a)(2)]

Similarly, the federal Mental Health Systems Act requires that every state provide case management services to chronically mentally ill individuals who receive substantial amounts of public funds or services [42 USC 300x-11(b)(6) (amendment of 1986, P.L. 99-660)]. For a fuller discussion of case management services for individuals with mental illness, see Platman *et al.*, 1982).

In the current federal Medicaid health insurance reform proposal, case management services are included as a reimbursable community and family-living service. The Social Security Act defines case management as "services which will assist individuals... in gaining access to needed medical, social, educational, and other services." [42 USC 1396n(g)(2)]

The federal special education statute, the Education for All Handicapped Children Act of 1975 (20 USC 1400 *et seq.*, P.L. 94-142) requires that a handicapped child's education and related services be co-ordinated by an interdisciplinary team according to an Individualised Education Programme (IEP). An IEP is:

"a written statement for each handicapped child developed in any meeting by a representative of the local educational agency or an intermediate educational unity who shall be qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of handicapped children, the teacher, the parents or guardians of such child, and whenever appropriate, such child, which statement shall include i) a statement of the present levels of educational performance of such child; ii) a statement of annual goals, including short-term instructional objectives; iii) a statement of the specific educational services to be provided to such child, and the extent to which such child will be able to participate in regular educational programs; iv) the projected date for initiation and anticipated duration of such services; and v) appropriate objective criteria and evaluation procedures and schedules for determining, on at least an annual basis, whether instructional objectives are being achieved." [20 USC 1301(19)]

Transition, the process of assisting young people with disabilities to move from special education and school to work, has been the focus of serious analytical work by OECD/CERI (1986). Case management forms an essential part of successful transition (a description of current US service systems and concepts in transition can be found in Ludlow, Turnbull, and Luckasson, 1988).

Many states have developed state regulation to accompany federal case management legislation. Minnesota, for example, has attempted to address the issue of case management by mandating that counties provide ongoing case management services to any client diagnosed as mentally retarded or as having a related condition. Case management services are defined as including "diagnosis, an assessment of the individual's services needs, an individual

services plan, and methods for providing, evaluating and monitoring the services identified in the plan" [Minnesota Statutes Annotated sec. 256B.092, (1988)]. Minnesota has also legislated an Interagency Office on Transition Services. The office is within the Department of Education and is directed to gather and co-ordinate data on transition services for secondary age handicapped pupils, provide information and technical assistance to state and local agencies involved in transition services from school to work, to assist in establishing local interagency agreements, and to assist in planning interagency training to develop and improve transition services [Minnesota Statutes Annotated sec. 120.183, 1988)].

A federal district court, after ordering the closing of Pennhurst, a large mental retardation institution in southeast Pennsylvania, mandated that the counties appoint case managers to serve the needs of all class members of the Pennhurst case (Halderman v. Pennhurst, 1979; Order for the Interim Operation of Pennhurst, March 5, 1979, reported in Conroy and Bradley, 1985). (For a well-researched description of the Pennhurst deinstitutionalisation, see Conroy and Bradley, 1985). The court found that lack of accountability in case management had been the central reason for the lack of movement from institution to the community (Laski and Spitalnik, 1979).

Two major professional groups, the Accreditation Council for Services to People with Developmental Disabilities (ACDD) and the National Association of Social Workers (NASW), have also addressed the principles of case management. A frequently cited definition of case management is found in the standards for accreditation of ACDD. This nationally respected voluntary accreditation group is comprised of the representatives of ten major professional groups in the field of mental retardation. Many service-providing agencies as well as consumers across the country regard the ability to meet ACDD standards as the hallmark of high-quality services. The federal government has, in several notable cases such as Medicaid federal health insurance, adopted ACDD standards as the federal law. ACDD standards emphasize co-ordinated service delivery and the section on plan co-ordination refers specifically to an individual plan co-ordinator or case manager. The relevant standards on case management follow:

"600. An individual program plan co-ordinator is designated for each individual being served. Regardless of who is designated, staff of all agencies providing any component of service required by the plan take an active role in assuring effective communication and overall plan co-ordination.

"605. Each individual unable to function as his/her own individual plan co-ordinator is assigned one who is responsible for monitoring and co-ordinating all activities in implementing the individual plan.

"606. If the individual is not the plan co-ordinator, the individual plan co-ordinator is identified to the individual, to the individual's parents or guardian or advocate, and to those persons who provide services to the individual.

"607. The agency's written procedures allow an individual or an individual's parents, guardian, or advocate to request and secure a different individual plan co-ordinator.

"If the individual is not the plan co-ordinator, the designated co-ordinator:

"608. assists the individual in locating and obtaining, outside or inside the agency, those services identified by the planning team;

"609. observes at least monthly the implementation of programs and the delivery of services, and intervenes to ensure implementation of the individual plan;

"610. facilitates the transfer of the individual to another service or agency when such transfer is desired by the individual and such a transfer is consistent with the individual's plan;

"611. elicits the individual's preferences and respects those preferences when they are not inconsistent with the achievement of goals;

"612. assists the individual in assuming management of those activities for which the individual has demonstrated management capacity. (ACDD, 1988)

The National Association of Social Workers promulgated "NASW Standards and Guidelines for Social Work Case Management for the Functionally Impaired" (November 2, 1984). While recognising that various models of case management are being practiced around the country, and that the case management function is not always carried out by professional social workers, the Association attempted to clarify some of the issues in order to guide social workers in providing case management. Case management was defined as "a mechanism for ensuring a comprehensive program that will meet an individual's need for care by co-ordinating and linking the components of a service delivery system. The components may be in a single agency or may be spread through various agencies. In either instance, sufficient authority must be granted to the case manager to allocate and monitor services if case management is to be effective."

NASW issued three standards to direct the professional behaviour of social workers in the provision of case management services:

"Standard 1. Enhancing self-determination. It is the responsibility of the social worker as case manager to assure that clients are involved, to the greatest possible extent, in the development and implementation of the plans for their care.

"Standard 2. Primacy of the client's interests. The social worker as case manager should use all his or her professional skills to serve a client and should carefully weigh the organization's goals in relation to the client's needs.

"Standard 3. Relationship with colleagues. As case manager, the social worker should treat colleagues with courtesy and respect and strive to enhance interprofessional co-operation on behalf of the client."

NASW further issued five guidelines formulated to direct the process of case management:

"Guideline 1: Case management tasks. Case management in long term care includes a multidisciplinary assessment of a client and a periodic review of the client's status, the development of a plan of care; implementation of the plan of care, co-ordination and monitoring of services; advocacy, termination of the case, and follow-up.

"Guideline 2: A shared function. Case management as a function that is shared by the social worker, the client and the client's family, and other professionals and agencies, requires a delineation of tasks.

"Guideline 3: Accountability and program evaluation. The accountability of the staff and the agency should be assured through appropriate documentation and data collection and through periodic evaluation of the quality, adequacy, and effectiveness of the case management system and of the services provided through this system.

"Guideline 4: Development of resources and social action. Because a wide range of social and health care systems must be available to assist the functionally impaired and their families, the social worker as case manager must be able to identify gaps in services and work toward the expansion or establishment of services in the agency and in the larger community to meet these needs.

"Guideline 5: Agency policies and resources. The many unique responsibilities of case management must be backed up by administrative and fiscal support and must be given appropriate consideration in the agency's planning, policy making, staffing, and budgeting processes." (NASW, 1984)

How is a case manager different from a traditional social services worker? Caragonne and Austin suggest this comparison:

#### Traditional

8:00 - 5:00.  
Routine schedule.  
Operates in office.  
One service emphasis.  
Little or no inter-agency contact.  
Authority on case-load only.  
Limited decision-making.  
Limited freedom to operate.  
Routine feedback.

#### Case management services

Indeterminant.  
Non-routine work.  
Community-based.  
Multi-service emphasis.  
Extensive and varied inter-agency contact.  
Authority to represent agency.  
Extensive decision-making.  
Extensive freedom to operate.  
Periodic, extensive feedback.

### Common themes in case management formulations

Upon reflection, several common themes emerge from the various formulations of case management described in the previous section. All of the formulations anticipate an individualised assessment and evaluation process designed to determine the needs of the individual. It also seems clear that the general purpose of case management is to improve the functioning of the individual, increase his independence and opportunities for a self-directed life, and to provide continuity of care. Undergirding these goals for the individual appears a strong push to distribute social services, both specialised and generic, in a manner as efficient, fair, and rational as possible. All agree that many individuals with developmental disabilities will require a complex array of services over a long period of time, thus resources and services must be genuinely available or there will be nothing to "manage". Finally, there appears to be general agreement that following up on the services received and monitoring the quality of those services are essential components of case management.

Ross (National Conference on Social Welfare, 1981, p. 106) suggested three models for case management programmes, the minimal model, the co-ordination model, and the comprehensive model. He proposed the following comparison:

<u>Minimal model</u>	<u>Co-ordination model</u>	<u>Comprehensive model</u>
Outreach.	Outreach.	Outreach.
Client assessment.	Client assessment.	Client assessment.
Case planning.	Case planning.	Case planning.
Referral to service providers.	Referral to service providers.	Referral to service providers.
	Advocacy for client.	Advocacy for client.
	Direct casework.	Direct casework.
	Developing natural support systems.	Developing natural support systems.
	Reassessment.	Reassessment.
		Advocacy for resource development.
		Monitoring quality.
		Public education.
		Crisis intervention.

### Controversies in case management

Review of the available literature suggests that several areas arise repeatedly as areas of tension in case management. These include: conflicts between the individual's judgement and the case manager's judgement; whether case managers ought to be independent or part of a service agency; whether case managers can effectively function solely on their personal negotiating skills or whether they must have genuine authority; whether case management responsibility ought to be designated in an individual or a team; what the optimum case management case-load is; and job satisfaction for case managers.

The possibility of conflicts between the individual's judgement and the case manager's judgement has been recognised by most authors. Resolution of conflicts specifically within the case management arena has not been the subject of published research.

Should case managers be independent or part of a direct service agency? The most frequently recognised drawback to case managers being part of a service-providing agency is the potential for conflict of interest (Bersani, 1988; Spitalnik, 1981). This conflict may arise in at least three ways: the manager's loyalty may be divided between his employer and his client; and the manager's loyalty may be divided between two clients of the agency; and the manager may limit his selection of services to the services provided by the agency by whom he is employed.

Forcing case managers to be separate from direct service agencies may, however, cause other problems. Such separation may make their professional positions unnecessarily precarious, unnecessarily isolated from the services they are supposed to be managing, and may deny them the "clout" necessary to negotiate their duties. When case management is a separated service, "privatisation" may occur, and non-governmental providers may sell the service under contract to the government. Spitalnik (1981) suggests that private providers of case management services are less desirable than government providers because they lack the institutional stability, permanency, and continuity provided by government services. Another important consideration is that under the US Constitution, important civil rights protections may be limited to the "State action" created by a government provider. Without those civil rights protections, individuals with disabilities are vulnerable to discrimination.

Clearly, case managers must have the ability or clout to actually accomplish the tasks required by their role. This means that in addition to granting them the necessary power, they must be accorded sufficient professional status. One means for assuring that case managers have the power to accomplish their goals is to develop formal inter-agency agreements concerning the receiving agency's acceptance of clients into their programmes. Some creativity may be lost, but the case manager may be spared some of the case-by-case negotiation or "re-litigation" otherwise required in every new situation.

Most authors in the developmental disabilities field suggest that case management responsibilities should be vested in an individual rather than a team. However, Best (1979) reports that in the mental illness field, team structure provides more consistent availability and continuity not dependent on a single case manager, better planning because of the additional points of view, and less "burn-out".

Questions of optimum case management case-loads rise frequently. The report from the State-of-the-art conference indicates that "no other issue was raised with equal consistency or discussed with equal vehemence" (National Conference, 1981, p. 10). Reports from across the states demonstrate that there is enormous variability, with the highest over 100 clients per manager. Later descriptions of case-loads as high as 300 are reported in Spitalnik and Sullivan (1988, p. 27). The judge in the Pennhurst case mandated a case-load of no more than 40. The feedback from the Pennhurst case managers was that a

more realistic load would have been 25. Case-load size depends, of course, on the nature of services being provided, the needs and demands of the clients, geographic considerations, and the skill and experience of the case manager. Weighting systems might usefully take into account such factors in the allocation of loads among managers.

The costs of case-loads that are too high include being constantly "on the run" and unable to develop relationships with the clients, always reacting to emergencies rather than helping clients plan for anticipated problems, and responding to the most insistent clients rather than fairly to all the clients. On the other hand, case-loads that are too low will drive up costs and perhaps generate dependence in clients who are too indulged by their case managers.

The job satisfaction of case managers was researched by Caragonne and Austin (n.d.). They report that case managers who expressed high job satisfaction reported high values on mediation skills, persuasiveness, flexibility, and knowledge of inter-agency policies. Satisfaction was positively correlated to greater numbers of inter-agency contacts, ability to receive referrals and to make referrals, and high levels of task feedback, task independence, and self-actualisation (p. 129).

#### Current practice

Several representative US case management systems will briefly be described, including California, North Carolina, Colorado, Florida, Eastern Nebraska Community Office of Retardation (ENCOR), and South Carolina. (The information was collected in 1980. For more detail, the reader should consult National Conference on Social Welfare, 1981, pp. 2.2-2.19). A recent three-year study of case management in New Jersey will then be reviewed.

California has 21 "regional centers" employing approximately 1 000 case managers, each manager serving about 64 clients. The regional centres are private non-governmental agencies which contract with the state to provide the services. The regional centre system began as a pilot study in 1966. Two special programmes train parents of persons with disabilities to be case managers. Great variation exists among the 21 centres.

North Carolina does not have a state-wide case management system, but it has five programmes serving eleven counties. The Craven County DD Case Management System has five staff members, each of whom serves approximately 105 individuals. An identified weakness is that since case management in North Carolina has no basis in state law, there is a perceived lack of legitimacy.

Colorado has had a state-wide case management system since 1978, operated through 22 private not-for-profit boards under contract to the state. There are approximately 130 case managers, each serving approximately 65 clients. The boards also provide direct services and consequently, conflicts of interest have been identified.

Florida state law has mandated case management services since about 1977. There are approximately 165 case managers, with case-loads of 105 each.

The system is operated out of the State Department of Health and Rehabilitative Services. Identified as the greatest strength of the Florida system is the authority and clarity accompanying the fact that all financial control is within the state agency.

In Nebraska, case management has been a component of the widely respected ENCOR since its inception in 1971. The five-county programme employs about 25 case managers, each serving approximately 37 clients. Administratively, there appears to be greater accountability to the counties than to the state.

South Carolina has operated a state-wide case management system out of the Governor's Office since 1980. There are 13 case managers, each with a case-load of approximately 35. The rural nature of the state creates problems in the delivery of services. The placement of the system within the Governor's Office is regarded as politically neutral. Case managers are given great discretion in the purchase of services, and this is regarded as enhancing staff morale and avoiding staff burnout.

New Jersey: one of the best analyses of a US case management system can be found in a recent report on the New Jersey experience (Spitalnik and Sullivan, 1988). New Jersey completed a three-year study of their case management system. Dr. Deborah Spitalnik, Director of the University Affiliated Program (UAP), Robert Wood Johnson Medical School, University of New Jersey, conducted the study. Currently, New Jersey has approximately 25 000 individuals receiving case management services. The study was prompted by the state's rapid de-institutionalisation, making case management increasingly critical for individuals with mental retardation entering the community for the first time; and New Jersey's expansion of eligibility for case management from a typically restrictive definition of mental retardation to the more expansive definition of developmental disabilities.

New Jersey analysed its current case management practice by a variety of methods, including:

- interview of case management staff at all levels within the Division of Developmental Disabilities (DDD);
- interviews of Special Child Health Services case managers;
- interviews of service providers within the state;
- a detailed survey of area supervisors within DDD;
- a three-tiered consumer survey of direct consumers, family members, and skill-development home providers;
- a review of an unpublished DDD 1985 internal audit of community services case management and intake units;
- a review of the DDD five-year plan;
- a review of the Public Advocate's 1984 survey of community residential facilities for the mentally retarded;
- a review of a monitoring study of mentally retarded clients placed in the community;
- consideration of the recommendations of the governor's taskforce on services for persons with disabilities;
- a detailed training needs analysis based upon feedback from participants in UAP training programs;

- a survey of case managers' perceptions of the Individual Habilitation Plan currently in use;
- analysis of the requests to the UAP for technical assistance;
- collaborative efforts with DDD staff and other service providers." (Spitalnik and Sullivan, 1988, p. 4)

Based on the extensive study, Spitalnik and Sullivan concluded that while the system was functioning adequately from the perspective of most current consumers, there was serious overload from the perspective of the staff. Dysfunction in the service delivery area was summarised:

- "-- discontinuity between service need information and system planning;
- overlapping service provision;
- restrictive practice in service provision;
- lack of specialised assessment and program resources;
- lack of access to generic resources;
- poor implementation of inter-agency agreements."

Factors which impact negatively on case managers' ability to function effectively include:

- "-- lack of clarity of role expectations to workers and to the public;
- lack of empowerment of case managers;
- high case-loads;
- paperwork requirements;
- need for enhanced supervisory structure;
- need for ongoing in-service education;
- need for enhanced support services."

The study goes on to make approximately 35 specific recommendations for improving the system. Clearly, the New Jersey Developmental Disabilities Council is pursuing improvement in the provision of case management services to individuals with developmental disabilities.

## Conclusion

Ultimately, the real question is how to provide the best case management services in a manner most conducive to successful community integration for individuals with disabilities. The research of Caragonne and Austin suggests that the following characteristics of the work environment lead to increased case management:

- "-- tasks are clearly defined by upper level management;
  - leadership providing structure and support;
  - high levels of autonomy;
  - little control of behavior through rules and regulations;
  - clear communication patterns between organizational levels;
  - tasks of case management supported within the work environment;
  - commitment to and involvement with the job of case management;
  - sanction to perform tasks in an unorthodox, innovative manner."
- (p. 115)

Successful community integration for people with developmental disabilities will depend on good case management services. All of our other work to assist in creating genuine opportunities for rich lives in the community will fail if we neglect this task. The issue warrants our best efforts.

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Part III

CONCLUSIONS

## ESSENTIAL ELEMENTS IN MANAGING TRANSITION

*The key message of this report is that young people with disabilities need a continuity of support if they are to make a successful transition to adult life. It is crucial that departments, agencies and professionals work to agreed ends to provide this continuity so that independence in working life can be achieved by all.*

### Introduction

The closing session of this phase of the project on the transition to working life of disabled people, as agreed at the outset, was a meeting of experts, in Denmark. Their role was to identify the most significant issues that are seen to be necessary to ensure the optimal management of this key period in the lives of disabled people.

At the meeting, following an extensive discussion of the case studies that have been reported in Part II, differences in opinion were expressed but consensus emerged over the conditions that are necessary to achieve a smooth transition from school to work for disabled people. The case studies themselves describe a variety of approaches to managing transition in certain Member countries and they illustrate how varying methods have developed in different contexts.

It emerged that the Kurator system as developed in Denmark was an important basis from which to evaluate different approaches and to identify significant case management issues. It was agreed that the Kurator system came closest to the most ideal arrangement and inevitably this model was clearly highly influential on the more general recommendations that follow.

The conclusions reached at this meeting are intended to be generalisable and are therefore stated rather broadly.

### Main conclusions

**Areas of general agreement** - It is important to stress that goals for individual disabled people can only be realised within the appropriate social framework and policies of a country, such as those that exist in certain Scandinavian countries. Some of the manifestations of such policies are goals which emphasise fairness, access to the benefits of society that are generally available to all, as well as inclusion and participation in the development of

the policies themselves. The realisation of these policies implies the right to full adult status with the pleasures and the pain, the privileges and responsibilities that that concept entails. A society must allow for the full development of all of its citizens and these rights should be reflected in its policies. It has to be recognised, however, that full participation is an action which must also be strived for by individuals and their families. Segregated provision, of any sort, is therefore in opposition to these goals.

In order to achieve these goals it was agreed that the general approach to young people who are disabled should:-

- a) be individualised, flexible and interactive;
- b) give adequate attention to psycho-social factors;
- c) involve a planned progression, continuity, follow-up and accountability;
- d) involve young people and their families in decision-making.

Furthermore, it has to be recognised and stressed that services will need to continue to be available and that these must have their focus in the neighbourhood and the community.

#### **The organisation of services**

The identification of services as an important aspect of successful transition clearly raises the question of how these services should be organised. It was agreed that:-

- a) they should be planned and provided in such a way that the individual, personal transitional arrangements are not only possible but an integral part of the service delivery system. This means that they must be client led to allow for a maximum degree of choice for the client. This itself requires a co-ordination of funding arrangements between services and agencies in addition to co-ordinated funding for individuals for the effective management of transition. Furthermore, the system must be flexible enough to be able to respond to the changing pattern of needs of the local community. This in turn means that resources and decision-making should ideally be delegated to the local level.
- b) these services should be operated by key-workers who themselves have particular needs:
  - i) they require appropriate training;
  - ii) they need small case loads since it is essential that support be given, not only to the client, but also to his family and under these circumstances cases can become especially complex;
  - iii) they need easy access to wide ranging information on for example all available programmes and resources;
  - iv) they need a professional support group, not only to maintain up to date knowledge and to develop skills, but also to increase

job satisfaction and to help to prevent 'burn-out'. There was some discussion over the preferred title to be used for this type of person. It was agreed that the name was important but the actual choice would clearly need to reflect the circumstances in each Member country;

- c) The arrangements must be closely monitored and evaluated to ensure for example continuity for clients across different case managers and in the programmes and services available as well as in the handing over, where necessary, from one agency to another. It would of course be preferable for cases to be handled by a single individual;
- d) A decision must be made over the range and scope of the case management function during transition. One arrangement may limit the process to one which ensured access to the appropriate facilities, while a different plan might well include an advisory and counselling role. The age range of the client group would also need to be agreed.

A further very important question indeed is whether or not the case management practice should only be related to the employment objective. For instance should the case manager also be concerned with the adjustment issues involved when a disabled adult moves from the institution to the community. The experience of the Kurator model has shown that there is pressure to extend the role of this manager to a wide range of disabling conditions such as severe mental retardation, thus going well beyond the initial brief of working with young people with moderate learning difficulties.

#### **The quality of the manager**

There is also a need to look at the qualities of the managers themselves. The following is an outline of some of the major features that such individuals would ideally possess, how they would operate and what they would do.

QUALITIES	PROCESS	ACTIVITIES
Experience with young people in school and elsewhere on a regular basis.	Assessment (multi-professional). Developing material for an individual transition plan (ITP).	Providing information about further education, employment training, leisure/recreation, housing benefits, etc.
Social flexibility.	Preparing with others an ITP.	Making relationships with the young person, families, teachers, social workers, employers/employees and agencies.
Good communicator in many different fields of home, school and work.	Agreeing the ITP with the young person and the family.	
Lives in and knows the area.	Facilitating the plan.	Facilitating visits, interviews, placements and the young persons contact with agencies.
A good listener.		
A good manager of behaviour.	Supporting the individual and the family.	Providing continuity during transition.
Counselling skills.		
Knowledge of disabilities.	Monitoring the effectiveness of transition.	Communication and co-ordinating individual programmes.
A person to whom others naturally turn		

#### Final comment

This part of the report has summarised the views that emerged at the meeting of experts for the implications of a case management approach to transition to work for young people with disabilities. The emphasis has been to provide guidance to those who might wish to plan transitional arrangements for disabled youth.

The report shows that there are principles and practices capable of being translated, in appropriate forms, to other contexts. However, this requires a knowledge and understanding of the transition process. Effective transition will not be achieved where the departments, agencies and professionals who contribute to transition work in isolation one from another.

The experts meeting shows that there was general agreement, among those who had studied the problem, on the main characteristics of effective management. Issues of priority and emphasis can only be resolved in the context of the policies and practices in individual Member countries. It is to be

hoped that this report will prove a useful basis on which to develop procedures for managing transition.

It is worthwhile repeating the main message again. Young people with disabilities need a continuity of support if they are to make a successful transition to adult life. It is crucial that departments, agencies and professionals work to agreed ends to provide this continuity so that independence in working life can be achieved by all.

FROM SCHOOL TO WORKING LIFE IN  
GENOA

*The Transition of Young Persons With Disabilities*

by

Martin H. Gerry

1989

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# TABLE OF CONTENTS

CHAPTER I - INTRODUCTION .....	1
BACKGROUND .....	1
Restricted Educational and Vocational Opportunities .....	2
Attitudes and Involvement of Others .....	3
Ineffective Service Coordination .....	3
Needed Improvements .....	4
ORGANIZATION OF PROFILE .....	5
DEVELOPMENT OF PROFILE .....	6
CHAPTER II - OVERVIEW OF THE ITALIAN/GENOA SYSTEM .....	7
THE ITALIAN HEALTH CARE PROGRAM .....	7
Structure of Local Health Units .....	7
Services to Children and Youth With Disabilities .....	8
MCH Structure .....	8
Special Pediatric Support Teams .....	9
Special Rehabilitation Institutes .....	10
ITALIAN/GENOVESE DISABILITY POLICY .....	11
Integration .....	11
Multi-Disciplinary Support .....	11
Community Participation .....	12
GENOA .....	12
SYSTEM OVERVIEW .....	13

<b>CHAPTER III - PRE-SCHOOL AND COMPULSORY SCHOOL PROGRAMS</b> .....	<b>14</b>
<b>PRE-SCHOOL PROGRAMS</b> .....	<b>14</b>
Program Design .....	15
Services For Children With Disabilities .....	15
<b>COMPULSORY SCHOOLS</b> .....	<b>17</b>
School Enrollment .....	17
Special Education .....	18
Eligibility for Special Education .....	18
The Regular Classroom .....	19
Special Education Services .....	20
Support Teachers .....	20
After-School Teachers .....	22
Related Services .....	23
Preparation for Transition .....	23
<b>CHAPTER IV - UPPER SECONDARY PROGRAMS</b> .....	<b>25</b>
<b>THE ACADEMIC PATH</b> .....	<b>25</b>
<b>THE VOCATIONAL PATH</b> .....	<b>26</b>
Work Experience Programs .....	27
Integrated Vocational Training .....	27
Special Training Workshops .....	28
<b>THE SHELTERED PATH</b> .....	<b>29</b>
Sheltered Workshops .....	29
Rehabilitation Centers .....	30
Day Care Centers .....	30
<b>THE EMPLOYMENT QUOTA</b> .....	<b>31</b>

CHAPTER V - THE GENOA PROJECT .....	32
OVERVIEW .....	32
PROJECT PHILOSOPHY .....	35
The Importance of Integrated Employment .....	35
Focus on Social and "Work" Skills .....	36
The Role of Co-Workers .....	37
A Mediation Role .....	38
PROJECT ORGANIZATION .....	39
The Guiding Committee .....	39
The Central Coordination Team .....	40
Special Transition Teams .....	41
Field Action Groups .....	42
PROJECT STRUCTURE .....	43
The Intake/Assessment Phase .....	43
The Work Evaluation and Training Phase .....	44
The Private Sector Strategy .....	45
Job Identification .....	46
Trial Work Period .....	47
Employment Support .....	50
The Public Sector Strategy .....	50
TRAINING OF PROJECT STAFF .....	51
CHAPTER VI - OUTCOMES AND IMPACT OF GENOA PROJECT .....	52
EMPLOYMENT OUTCOMES .....	52
COST EFFECTIVENESS .....	52
RELATIONSHIPS WITH FAMILIES .....	53

CHAPTER VII - TRANSITION IN AMERICA: PROGRAM IMPLICATIONS .....	54
"TRANSITION" IN AMERICA .....	54
The Current Effectiveness of Transition .....	55
Ineffective Coordination and Integration of Programs .....	56
Inaccessibility of the Service System to Clients .....	57
Dispersion of Management Responsibility .....	57
Inflexibility and Lack of Continuity of Current Programs .....	59
Job Training and Supported Employment .....	59
The Ineffectiveness of the SSA/VR Referral System .....	61
Other Factors .....	63
KEY ELEMENTS OF THE GENOA TRANSITION APPROACH .....	63
Innovative Elementary and Middle School Education Strategies .....	64
Flexible Vocational Training and Innovative Trial Work Strategies .....	66
Work Evaluation and Training Approach .....	67
Innovative Trial Work Approaches .....	67
Ongoing Employment Support Systems .....	68
GLOSSARY .....	70
INDEX .....	76
APPENDICES:	
APPENDIX A - SYNOPSIS OF THE OECD STUDY OF TRANSITION	
APPENDIX B - AN OVERVIEW OF THE GENOA APPROACH	
APPENDIX C - THE ITALIAN HEALTH CARE SYSTEM	

*Restricted Educational and Vocational Opportunities*

Historically, a large number of young persons with moderate and severe disabilities had been confined to residential institutions for long-term care. These facilities offered little in the way of basic education and provided no vocational education services. Apart from adult day care services and limited "sheltered work" opportunities, these residential programs were designed with the assumption that "clients" or "patients" with disabilities could not and would not successfully "transition" to adult working life in community settings.

In the mid-1970's as residential institutions for persons with moderate and severe disabilities were officially closed, the integration of large numbers of these young people into regular compulsory schools first occurred. With this major social change, the possibility of successful transition by young persons with moderate and severe disabilities from school to integrated, competitive employment was first seriously addressed.

A key problem frustrating successful transition for young people with moderate and severe disabilities to competitive employment and independent community living which soon emerged was the absence of needed social and work skills and competencies. Experience demonstrated that while many young persons with disabilities could master specific job skills they lacked the proper psycho-social preparation for the demands of the work environment (e.g., the rules of the workplace, the social contact with supervisors and fellow employees). It became readily apparent that an important factor leading to the failure of individuals to develop these needed "work skills" was the lack of practical experience, i.e., actual exposure to the workplace.

## *From School to Working Life in Genoa*

### *Attitudes and Involvement of Others*

Prior to the initiation of the Genoa Project, and exacerbated by the long-time school segregation of children with moderate and severe disabilities, non-disabled members of the Genoa community (e.g., employers, workers, shopkeepers) had comparatively little contact with persons (children and adults) with moderate and severe disabilities. This lack of familiarity, in turn, created a negative psycho-social environment for transition. Many employers and unions either believed that most disabled persons were incapable of productive employment or that necessary employment support would be costly and disruptive. Most potential coworkers tended to view the addition of moderate and severely disabled persons to the workforce as both threatening (in terms of limiting the number of available jobs) and burdensome (i.e., likely to increase the work expected from their non-disabled peers).

### *Ineffective Service Coordination*

Prior to the implementation of the Genoa Transition Approach, the responsibility for interagency service coordination was left entirely to the young person with disabilities and his or her family. Most of the problems encountered by young persons with disabilities in linking competitive employment and independent living may be attributed to the lack of effective service coordination among the responsible public agencies. Even when the supply of job opportunities increased, employment prospects for young persons with moderate and severe disabilities did not keep pace. The important missing ingredient was a mechanism for ensuring intensive cooperation among health and rehabilitation staff, employers and students and their families to plan and ensure successful transition.

## *From School to Working Life in Genoa*

### *Needed Improvements*

In light of the problems identified above, the founders of the Genoa Transition Approach arrived at six basic conclusions regarding the design of an improved transition approach for young persons with moderate and severe disabilities:

- (1) During the compulsory school period, maximum attention should be given to the integration of children with moderate and severe disabilities within regular classrooms and on the development of age-appropriate social and communication skills.
- (2) In order to "transition" from school to gainful employment, young persons with moderate and severe disabilities need expanded and intensive services designed to assist them to acquire needed "work skills" and practical work experience before attempting to sustain competitive employment, necessitating practical forms of collaboration among the various agencies responsible for the provision of vocational and employment related services.
- (3) Employers and coworkers must be directly and substantially involved in the development of needed work skills and in the ongoing support of disabled employees in order to build and maintain a climate of strong psycho-social support.
- (4) "Trial Work" approaches need to be developed which create financial incentives for employers to "take a risk" in hiring and maintaining first-time employees with moderate and severe disabilities.
- (5) Young persons with disabilities and their families should be involved in identifying the assistance that they need and in deciding how and by whom that assistance should be provided.
- (6) The leadership of the Genoa community (particularly city officials and major employers and unions) is essential if young persons with disabilities are to fully benefit from the various resources which exist within the community.

## *From School to Working Life in Genoa*

### ORGANIZATION OF PROFILE

The purpose of this descriptive profile is to provide American education and rehabilitation agencies with a basic understanding of the Genoa approach to the education and transition of developmentally disabled young persons from school to adult and working life. Its goal is to provide information sufficient to allow those agencies to replicate or adapt one or more important features of the Genoa approach. It must be stressed that the descriptions provided below are a composite of the current practices in Genoa. Because of the significant variations in local service structures within the city, no totally uniform system exists.

In organizing this profile it has been necessary to present information both about the Genoa Project and the overall educational and health systems within which it operates (i.e., "the Genoa Approach"). In doing this, it became difficult to decide which information to present first. A decision was made to provide first a general introduction to the overall system within Genoa to provide health and social services to persons with disabilities (Chapter II). Following this introduction, Chapter III outlines both the basic pre-school and compulsory school education program provided for all children in Genoa and of the provision of special education services within the city. This general overview is followed by a description of the various upper secondary education, training and work programs currently operating within the municipality (Chapter IV). Chapter V presents a detailed discussion of the Genoa Project, the key component of the Genoa Transition Approach, and Chapter VI presents a summary of available information regarding the Project outcomes and impact. The Profile concludes with a discussion of the current ineffectiveness of American transition programs and the implications of the Genoa experience for solving problems in the American transition approach which contribute to its current ineffectiveness (Chapter VII).

## *From School to Working Life in Genoa*

### DEVELOPMENT OF PROFILE

This descriptive profile is based on information provided to OECD over a five-year period by the Italian Ministry of Education and by the regional and municipal authorities in Genoa. It is also based on extensive information collected through two on-site visits to Genoa in December, 1987 and October, 1988. These field visits included both on-site observation of service provision in Genoa and interviews with young persons with developmental disabilities, employers, co-workers and staff of the educational agencies of both Liguria and Genoa and of various local health and social service units.

The profile was developed by Mr. Martin Gerry of the Fund for Equal Access to Society ("FEATS") and Dr. Wayne Sailor of San Francisco State University, with extensive assistance from Ms. Kathleen Kelley, OECD, and from Dr. Enrico Montobbio (Director of the Genoa Project) and several members of his staff. FEATS would like to express its appreciation to OECD, Mr. David Thomas for his assistance throughout the preparation of the profile and to Dr. Michael Hardman (University of Utah) for his assistance in both organizing and conducting the field data collection activities and in the preparation of the profile. FEATS would like also to express its appreciation to Dr. Nora Ferro (Rome Transition Project), Dr. Wendy Turnbull (University of California Medical Center) and Ms. Terry Hardman for their assistance during the Genoa field visits. FEATS also wishes to thank Mr. Luca Montobbio who served as a field interpreter during the Genoa visits.

## **CHAPTER II – OVERVIEW OF THE ITALIAN/GENOA SYSTEM**

Social Policy in Italy establishes a basic obligation on the part of government (national, regional and local) to provide whatever health care and social support is needed by families and individuals unable to successfully participate in the mainstream social and economic systems of the country.

### **THE ITALIAN HEALTH CARE PROGRAM**

The Regional Administration of the Italian Ministry of Health and Social Services is generally responsible for employment and rehabilitation provisions for disabled people and all health and social services delivered by the local health authorities within Genoa.

### **Structure of Local Health Units**

For purposes of program operation, the City of Genoa is divided geographically into local health districts, each containing a population of approximately 80,000 persons. Within the average Genoa district, approximately 11,000 persons (or 14% of the total population) are children. Each local health unit is divided into seven principal "services": (1) Veterinary Medicine; (2) Basic, Specialist and Pharmaceutical Medicine; (3) Public and Environmental Health, Work Safety and Forensic Medicine; (4) Hospital Services; (5) Mental Health Services; (6) Handicapped and Geriatric Services; and (7) Maternal and Child Health Service (see Appendix C).

## *From School to Working Life in Genoa*

### Services to Children and Youth With Disabilities

All non-residential health and social services for children and young persons in Genoa under the age of 18 are under the supervision of the Maternal and Child Health Service ("MCH unit") of the local health agency serving the catchment area in which the child resides. As indicated above, each MCH unit has a total client population of approximately 11,000, approximately 250 of whom are identified as disabled.

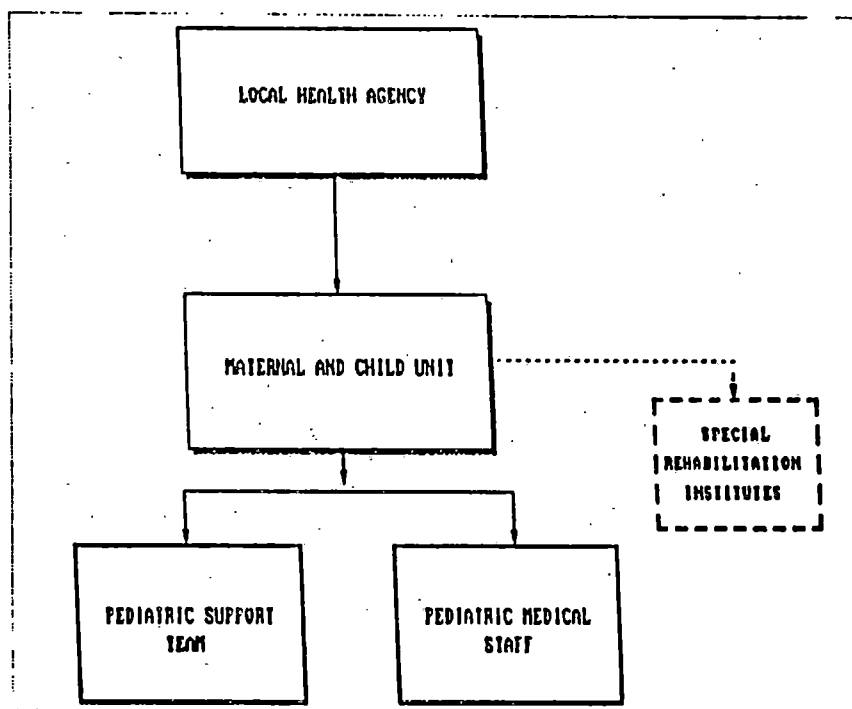


Figure 1 - MCH Subunits

#### **MCH Structure**

Within each MCH unit services are provided to children and youth with disabilities through three principal subunits: (1) the regular pediatric medical staff; (2) a special Pediatric Support Team; and (3) Special Rehabilitation Institutes, financially supported by the unit (see Figure 1).

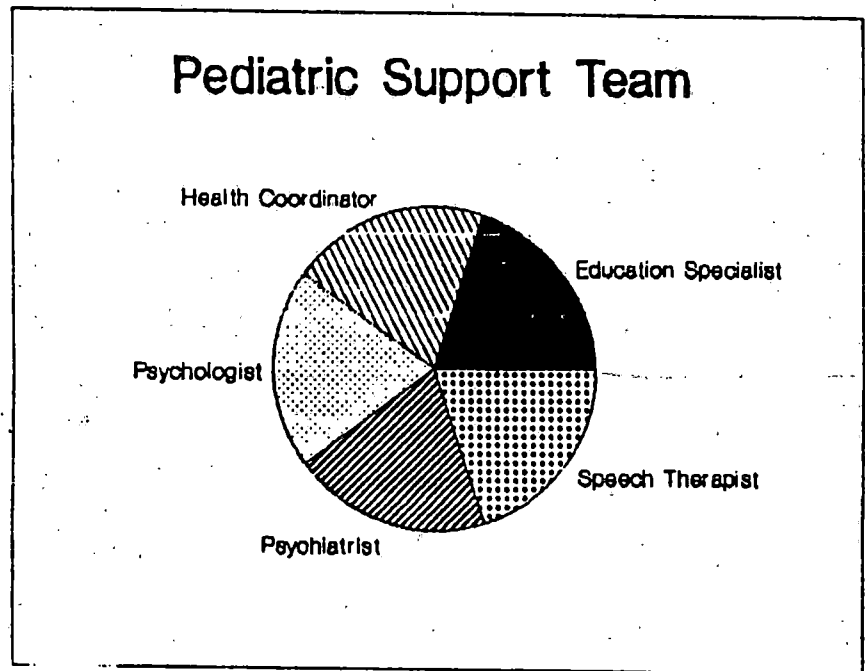
The services provided by the regular pediatric staff for children with disabilities are identical to those provided to all other children. These services include preventive health care, diagnosis and treatment. The services provided

by each of the other MCH units are focused on the provision of special health and social support to children and youth with disabilities and their families. Services include neurological and PKU screening of infants, school health services (including routine vaccinations), and health education.

### **Special Pediatric Support Teams**

Within each MCH unit a Special Pediatric Support Team has been established in order to coordinate the provision of health and social services to approximately 250 children and young persons under the age of 18 who have been identified as disabled. Each Pediatric Support Team consists of a Supervisor (a psychiatrist who also serves as

Coordinator of Services for the compulsory schools located within the catchment area), three educational specialists, two clinical psychologists and two speech therapists. The After-School Teacher, although not a regular employee of the MCH unit, functions as a de facto member of



**Figure 2 - Pediatric Support Team**

the Pediatric Support Team during the periods of pre-school and compulsory school enrollment (see Figure 2).

### *From School to Working Life in Genoa*

The Pediatric Support Team provides services to children in pediatric day care and, as is described above, most children of preschool or school age with disabilities receive "related services" through their local Team. Members of the team also serve as members of the multi-agency staffing group operating within public pre-school programs, including the Supervisor/Coordinator of Services, a clinical psychologist, and speech therapists.

Within a school population, determinations as to which children are disabled (and thus which children are entitled to "special education services") are made by the local Pediatric Support Team. During the period of compulsory school enrollment, members of each Pediatric Support Team work closely with the school staff (particularly with the Principal and with Support Teachers) of the compulsory schools located within their "catchment" area. Team members also participate both in the development and the monthly or bi-monthly reviews of individual educational plans for each disabled child.

Pediatric Support Team members are also responsible for several in-school health related activities, including parent/teacher counseling, support groups for mothers of children with disabilities, and language and psycho-motor evaluations.

### **Special Rehabilitation Institutes**

Special Rehabilitation Institutes in Genoa, operating under contract to one or more MCH units, provide comprehensive "related services" to children with disabilities in each of the following categories: (a) children with moderate or severe mental retardation (including virtually all children with Down Syndrome); (b) children who are blind and deaf-blind; and (c) children who are non-ambulatory. Each of these special institutes is operated by a parents association. Services offered at the Institutes include speech therapy, occupational and physical therapy, psychological services, recreation, social work services, school health services, parent training and transportation.

## *From School to Working Life in Genoa*

### ITALIAN/GENOVESE DISABILITY POLICY

Elementary and secondary education in the Republic of Italy is under the supervision of the national Ministry of Education. Education and transition policy regarding persons with developmental disabilities in Genoa is centered around three main principles: (1) integration; (2) multi-disciplinary support and (3) community participation.

#### Integration

Within the City of Genoa, the principle of "integration" has been pursued both in the process of education and in the formulation of its ultimate goals. Virtually all children with disabilities are enrolled in regular compulsory schools and are assigned to regular classroom settings. Students with even the severest disabilities are included in the age appropriate peer groups, and the compulsory school curriculum emphasizes the development of social and communication skills. Integrated gainful employment and independent adult life within the community have been established as the primary outcome goals for the Genoa Project. Within the project, work evaluation and work experience strategies are used which focus on regular integrated employment settings rather than sheltered work.

#### Multi-Disciplinary Support

The principle of "multi-disciplinary" support stresses the importance of involving persons drawn from a wide range of disciplines in different aspects of the transition process. In Genoa, psychologists, psychiatrists, social workers, special support teachers and regular educators all play important roles in the education/transition process. One important aspect of this multi-disciplinary process is the expansive role played by local health agencies. Indeed, the success of the Genoa Approach is due in large part to the work of talented professionals drawn from many disciplines who are committed to the goals of social and economic integration for all persons with disabilities.

## *From School to Working Life in Genoa*

### Community Participation

The principle of "community participation" requires that all sectors of the community be actively involved in the overall "transition process". This active involvement, as a practical matter, requires the effective linkage of employers, labor unions, health facilities, and government agencies at the municipal and regional levels in order to form an effective support network for young persons with disabilities and their families. In addition to this broad concept of organizational participation, the principle of community participation also anticipates that peers, co-workers and family members will play an active role in the transition process as primary support providers.

### GENOA

The City of Genoa is a large industrial and port city located on the Northwestern coast of Italy. With a total population of approximately 800,000, Genoa is the largest city and capitol of the region of Liguria. Genoa has a school age population of over 200,000 and one of the highest unemployment rates of any industrial area of Italy (60,000 persons or 10% of the total workforce are currently unemployed). Within the total population of persons currently unemployed, 17,000 (or approximately 30%) are under the age of 20.

Genoa has, however, enjoyed an unusual degree of political and social stability during the last decade as a result of strong collaboration among local political, managerial, professional and labor union leadership. Union support for integrated employment has played an important role at both the national and local levels. Although the present economic situation has slowed down the process of integration into open employment, the principle has been firmly accepted and employment integration continues to increase. One of the Genoa Project's greatest concerns, however, is the absence of new jobs in the local labor market.

## *From School to Working Life in Genoa*

### **SYSTEM OVERVIEW**

The Genoa Project is administratively located within the Handicapped and Geriatric Service unit of one of the local health authorities in Genoa. By design, however, the project draws participants from the entire city and actively coordinates the operation of its program with all of the health units, including each of their MCH, Mental Health and Handicapped and Geriatric subunits.

A chart providing an overview of the structure of the Genoa Approach is attached as Appendix B.

## CHAPTER II - PRE-SCHOOL AND COMPULSORY SCHOOL PROGRAMS

In Genoa, public pre-school educational programs are operated on a voluntary enrollment basis for all children ages 3-6. In contrast, education for all children between the ages of 6 and 15 is mandatory.

### P R E - S C H O O L P R O G R A M S

Public pre-school education is provided 8 hours per day, five days per week in a system of separate public pre-schools. Private pre-school programs also operate within the city.

Of the 20,000+ children of pre-school age in Genoa, approximately 18,000 (or 90%) are enrolled in public and private pre-school programs. Within this group of pre-schoolers, approximately 17,000 are enrolled in public pre-school programs (94%) and 1,000 (6%) are enrolled in private programs (see Figure 3).

### Children Attending Preschools

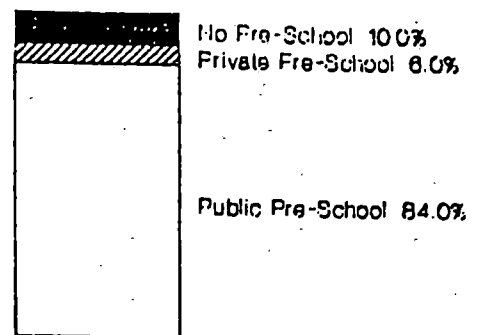


Figure 3 - Enrollment in Pre-School Programs

## *From School to Working Life in Genoa*

### *Program Design*

Public pre-school education is provided free of charge to all children. Special transportation to and from the pre-school is also provided whenever public transportation systems are unavailable. The public pre-school program stresses social development, creativity and cooperative activities rather than academic development. Average pre-school class size is approximately 12, and open classroom structures are used to promote social interaction among all pre-school children in the same age groups.

Between 3% and 5% of the children enrolled in public pre-school programs are identified as disabled. Within the context of American pre-school programs, these children would generally be classified as "developmentally disabled." Children with disabilities enrolled in public pre-school programs are assigned to regular, age appropriate classes, and no more than two children with disabilities may be enrolled in any one classroom grouping.

### *Services For Children With Disabilities*

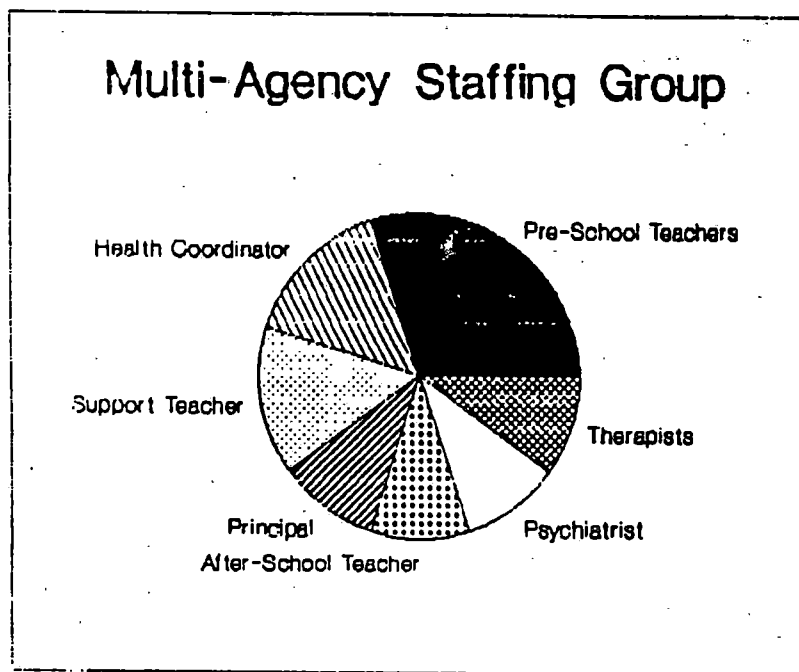
While the pre-school program for children with disabilities is the same as the program for all other children, special procedures are followed to ensure that each child with a disability fully participates in and benefits from pre-school activities. A special, Multi-Agency Staffing Group (see Figure 4) meets at least once each year to discuss the unique characteristics of each child. Pre-school staff typically included as members of this multi-agency staffing group are:

- (1) The child's "Support Teacher";
- (2) The child's current pre-school teacher;
- (3) The child's past pre-school teacher; and
- (4) The pre-school principal.

The balance of the members of the multi-agency staffing group are employees of the local health authority, including a Coordinator of Services to disabled children (usually a clinical psychologist), a neuro-psychiatrist, therapists (e.g., speech therapy, physical therapy) and the child's "After-School Teacher." While the child's parents are not included in the annual staffing meeting, they do participate in monthly meetings with responsible health agency staff (i.e., the Coordinator and neuro-psychiatrist assigned to the child) to discuss the child's needs and progress.

The primary objective of the annual multi-agency staff meeting is the development of an individualized plan to support successful participation by the child in the full range of pre-school activities. Regular classroom based "special education services" described in the plan are provided by Support Teachers (described in detail in Chapter III) and by employees of the local health agency (described in detail in Chapter II). Responsibility for the instruction and supervision of all other pre-school activities (including for children with disabilities) is assigned to the regular classroom teacher.

Children enrolled in a pre-school program may be "retained" for an extra year if they are judged by the Multi-Agency Staffing Group to be socially unready for enrollment in a local elementary school. In the event such a decision is made, the



**Figure 4 – Multi-Agency Staffing Group**

## ***From School to Working Life in Genoa***

staffing group must prepare a written report explaining the basis for the retention decision and must secure parental approval in advance.

### **COMPULSORY SCHOOLS**

In Italy, all children ages 6 to 15 must attend a public or private school program. The vast majority of parents in Genoa (over 95%) choose to enroll their children in the public Compulsory Schools. In Italy, compulsory public education is separated into two sequential comprehensive school programs -- "elementary" and "middle" schools. Elementary Schools enroll children between the ages of 6 and 11 years; Middle Schools enroll children between the ages of 11 and 14 years. Italian "High Schools", which enroll children ages 15 to 19, are not compulsory.

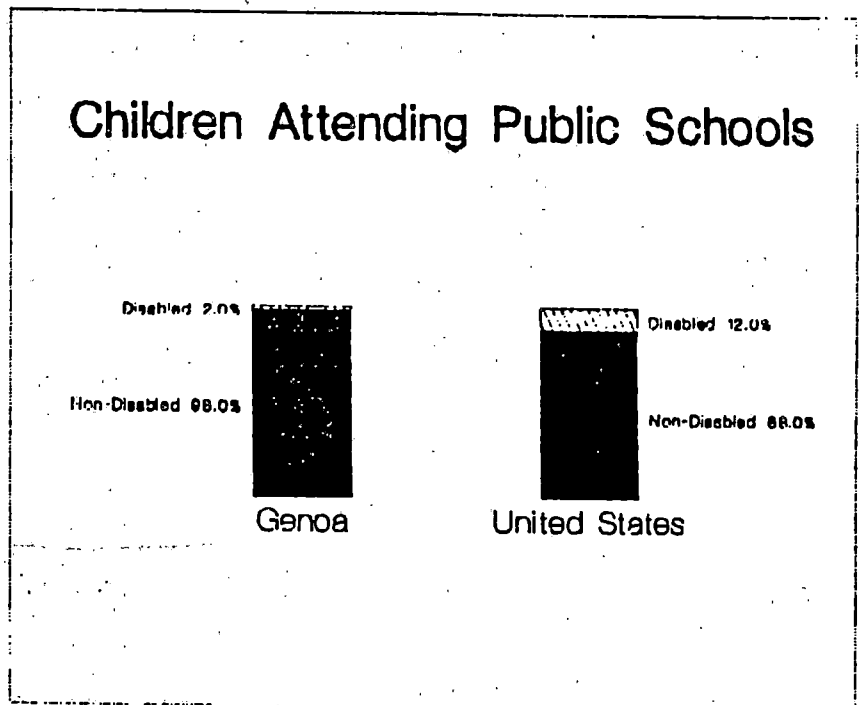


Figure 5 - School Enrollments

### **School Enrollment**

In Genoa approximately 31,000 students are currently enrolled (see Figure 5) in public elementary school programs (ages 6-11) and 28,000 students are enrolled

## *From School to Working Life in Genoa*

in public middle school programs (ages 11-15). National laws passed in Italy in 1971 and 1977 clearly mandate the integration of all disabled children in both regular elementary and middle schools (1971) and within heterogeneous classrooms (1977). As a result, "special education" in Genoa does not exist as a "place" or series of places within Genoa but as a constellation of support services provided to some children within the regular education program.

### *Special Education*

In Genoa, just as in every American school system, children of school age who are identified as disabled receive both special instructional services ("special education" in the American context) and, as appropriate, a variety of developmental, corrective and supportive services ("related services" in the American context). In Genoa, special education services are virtually always provided in the least restrictive classroom environment.

### ELIGIBILITY FOR SPECIAL EDUCATION

As a result of this definition of "special education", the number and percentage of children identified as "disabled" within the Italian schools is surprisingly low (approximately 2% of all students). This national trend is well reflected in Genoa, where, in 1988, only 520 (or less than 2%) of the children enrolled in elementary schools were identified as "disabled", and 776 children (or 2.5%) of the children enrolled in middle schools were so identified (see Figure 5). Within a school population, determinations as to which children are disabled (and thus which children are entitled to "special education services") are made by the local health agency and not by the school system. In practice, children identified as disabled by the local health authorities are divided into three groups: (1) mildly disabled; (2) moderately disabled; and (3) severely disabled.

In Genoa, the incidence rate of identification of school-age children as "disabled" (2%) is approximately 15 to 20% of the comparable incidence rate (10-15%) in the United States. The primary factors which account for this significant

disparity include the failure to include substantial percentages of children with "mild" speech impairments, children with mild "learning disabilities" and children with behavior problems (who are not

clinically determined to be emotionally

disturbed) within the label of disabled. Because of the stress placed on school and classroom integration in Genoa, the principal consequences of this "under-identification" are the absence of an individualized educational plan and the unavailability of services from an After-School Teacher (discussed below).

## Special Education Instruction

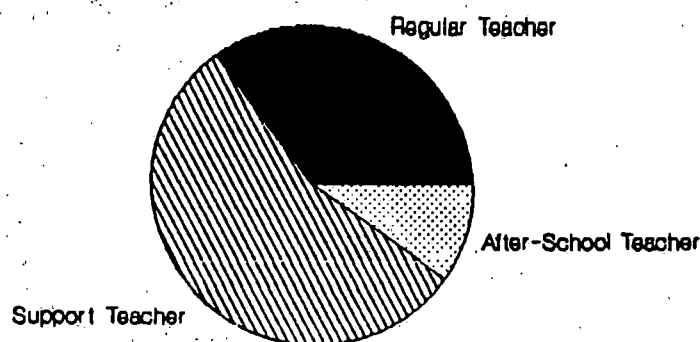


Figure 6 - Special Education Services

### THE REGULAR CLASSROOM

Elementary and middle school education in Genoa is provided, for the most part, in self-contained classroom settings where the teacher/pupil ratio is not permitted by national law to exceed 1:20. The regular classroom placements of all students with disabilities (including those with "severe intellectual disabilities") are age-appropriate and in natural proportion to the overall composition of the school population. Children with disabilities are randomly distributed among all classrooms and no classroom may have more than two disabled students on the class roll at the same time. In the Fall of 1988 fewer than 20 children with

## *From School to Working Life in Genoa*

disabilities (1.5% of all children with disabilities) were assigned to separate classroom settings. In most cases, these children (all very severely disabled) were "transitioning" to regular classroom-based programs. The curriculum utilized within the regular classroom structure places much greater emphasis on socialization and social skills development than do most American curricular models for children in the same age groups. In many instances, the same teacher may stay with a class of children for several years.

### **SPECIAL EDUCATION SERVICES**

"Special education" for all disabled children in Genoa is provided by regular classroom teachers (described above), by Support Teachers who are employed by and work within the compulsory schools and by special "After-School Teachers" who are employed by the City of Genoa upon the request of the local health agency (see Figure 7). In some instances, students with disabilities may also be provided an extra year of compulsory schooling during middle school (ages 11-16).

### **SUPPORT TEACHERS**

In Genoa, Support Teachers provide assistance to the regular classroom teachers both with respect to the disabled children enrolled and the total curricular effort. In fact, by law the services of the Support Teacher are provided to the classroom in which the disabled student is enrolled and not to the disabled student.

Support Teachers are former regular teachers who have taken specialized training (usually, two additional years) on a wide range of subjects, including psychology. Most of the assistance provided by Support Teachers in Genoa occurs physically within the regular classroom and includes the use of team-teaching and small group instruction strategies as well as individual instruction.

Support Teachers tend to use expressive-emotional or therapeutically oriented approaches rather than the more behavioristic or "skill building" approaches used in most American special education programs. For example, Support Teachers often

## *From School to Working Life in Genoa*

provide small group instruction to disabled and non-disabled children which is designed to facilitate interaction among the children and increase the participation of the disabled children within the group.

The primary student "caseload" for a Support Teacher ranges from one to

four students based

on an assessment of the severity (not the type) of the student's disability. Support teachers are organized into four general areas of specialization:

- (1) Mental handicaps;
- (2) Learning and behavior handicaps;
- (3) Deaf; and
- (4) Blind.

Occasionally, individual children with disabilities are "pulled out" of the regular classroom for individual or small group instruction by Support Teachers. Non-disabled students with significant learning problems, including those students not labelled disabled in Genoa who would be so labelled in an American school system, are also provided individualized and small group instruction by Support Teachers. Finally, Support Teachers provide community-based instruction for moderately and severely disabled children in a wide range of learning

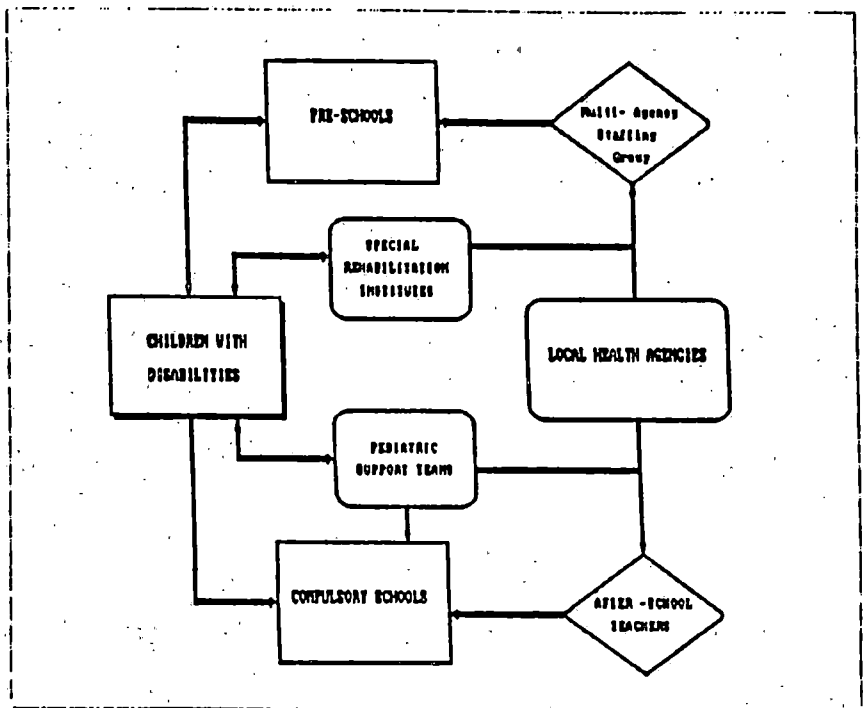


Figure 7 - Interagency Support

environments in a manner similar to that used in "best practice" programs in the United States. Within the various settings, the emphasis of the Support Teacher's work is much more on socialization, participation and "belonging" than is the case in comparable American programs.

One of the most striking features of compulsory education programs in Genoa is the high degree of social acceptance at all ages among non-disabled peers. Repeated observation of activities in the compulsory school both inside and outside of the classroom reveals very few instances of social "differentiation" or rejection of disabled students by their non-disabled peers.

#### AFTER-SCHOOL TEACHERS

Each pre-school and school age child in Genoa who has been identified as disabled is assigned to a specific Pediatric Support Team operated by the local health agencies within the City of Genoa. A detailed description of the structure and operation of the entire Pediatric Support Team is presented in Chapter II above.

Members of each Pediatric Support Team work closely with the school staff (particularly with the Principal and with Support Teachers) of the compulsory schools located within their "catchment" area. Team members also participate both in the development and the monthly or bi-monthly reviews of individual educational plans for each disabled child. One of the key members of the Pediatric Support Team is the After-School Teacher.

The After-School Teacher, consistent with the child's educational plan, provides special one-to-one instruction, usually in the child's home. The curriculum for after-school teaching is closely coordinated with the regular classroom curriculum through frequent consultations between the child's Support Teacher and After-School Teacher. As is the case with the Support Teacher, the After-School Teacher may provide instructional support services to the same child over a period of several years. After-school instruction is typically provided for 2-3 hours per day, 2 or 3 days per week. In addition to direct instruction and "tutoring" with the child, the After-School Teacher often also works with the

## ***From School to Working Life in Genoa***

child's mother to help develop parental reinforcement and support for the overall educational strategy. The After-School Teacher routinely attends the monthly or bi-monthly case conferences held between Pediatric Support Team members and compulsory school staff.

### **RELATED SERVICES**

"Related services", as that term is used in American school systems, are provided in Genoa either by members of the local health agency or by staff of special "Institutes" which are operated by parent associations. These related services include speech therapy, occupational and physical therapy, psychological services, recreation, social work services, school health services, parent training and transportation.

Special Rehabilitation Institutes provide comprehensive "related services" to children with disabilities in each of the following categories: (a) children with moderate or severe mental retardation (including virtually all children with Down Syndrome); (b) children who are blind and deaf-blind; and (c) children who are non-ambulatory.

All other children of pre-school or school age with disabilities receive "related services" through their local Pediatric Support Team. All related services are provided free of charge and after regular school hours.

### **Preparation for Transition**

During their final year of middle school, students enrolled in each public middle school in Genoa (including all students with disabilities) and their families participate in a three-pronged "transition" program which involves special classroom instruction focused on various transition issues, site visits to various upper secondary and employment options, and individualized transition counseling provided to students and their parents.

Individualized transition counseling is provided by a special "Regional Transition Team". These regional teams, which are voluntary, are composed of

## ***From School to Working Life in Genoa***

regular and support teachers from various school sites within a particular region of the city. Regional transition teams meet with students and their families to discuss both academic and vocational interests and aptitudes. Based on these discussions, team members work to identify specific placement opportunities for each student who will be leaving the compulsory school program. These placement options include both further academic training (e.g., high school), direct employment approaches (e.g., apprenticeship), a range of vocational training options (e.g., post-secondary vocational school; the Genoa Project), and sheltered workshops.

## CHAPTER IV – UPPER SECONDARY PROGRAMS

Students with disabilities leaving Compulsory Schools in Genoa at age 15 or 16 have a choice of four different paths leading to employment: (1) the Academic Path; (2) the Vocational Path; (3) the Sheltered Path; or the Genoa Project (see Figure 8). This chapter provides an overview of the first three paths. The fourth path, the Genoa Project, is the subject of detailed discussion in the next chapter.

### THE ACADEMIC PATH

Students successfully completing public middle schools in Genoa may elect to enroll in one or more of the public High Schools operating within the city.

S u c c e s s f u l  
completion of the  
H i g h S c h o o l  
program, in turn,  
permits students  
t o e n t e r  
universities and,  
thereafter, the  
various fields of  
e m p l o y m e n t  
r e q u i r i n g  
graduate and  
undergraduate  
e d u c a t i o n .  
Traditionally,  
o n l y a f e w

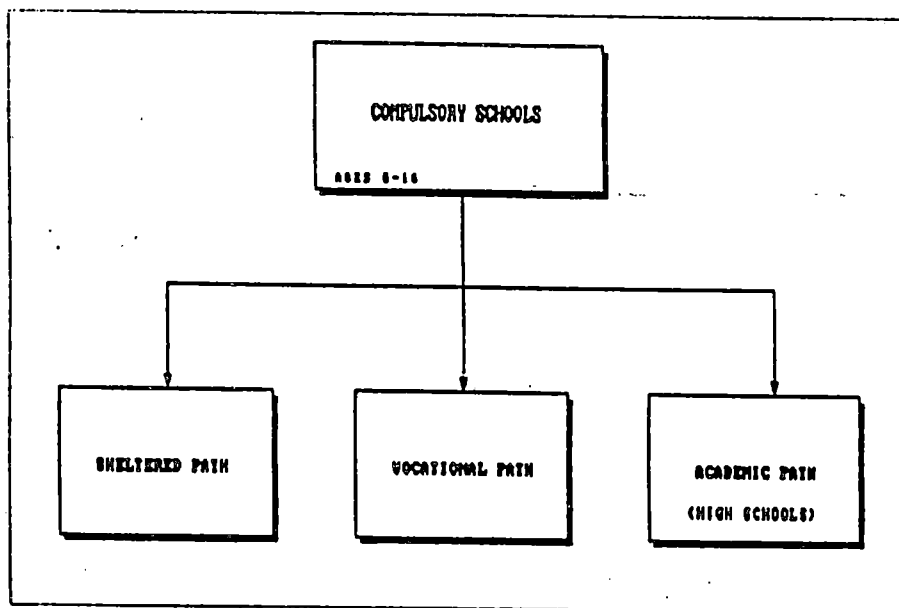


Figure 8 – Upper Secondary Paths

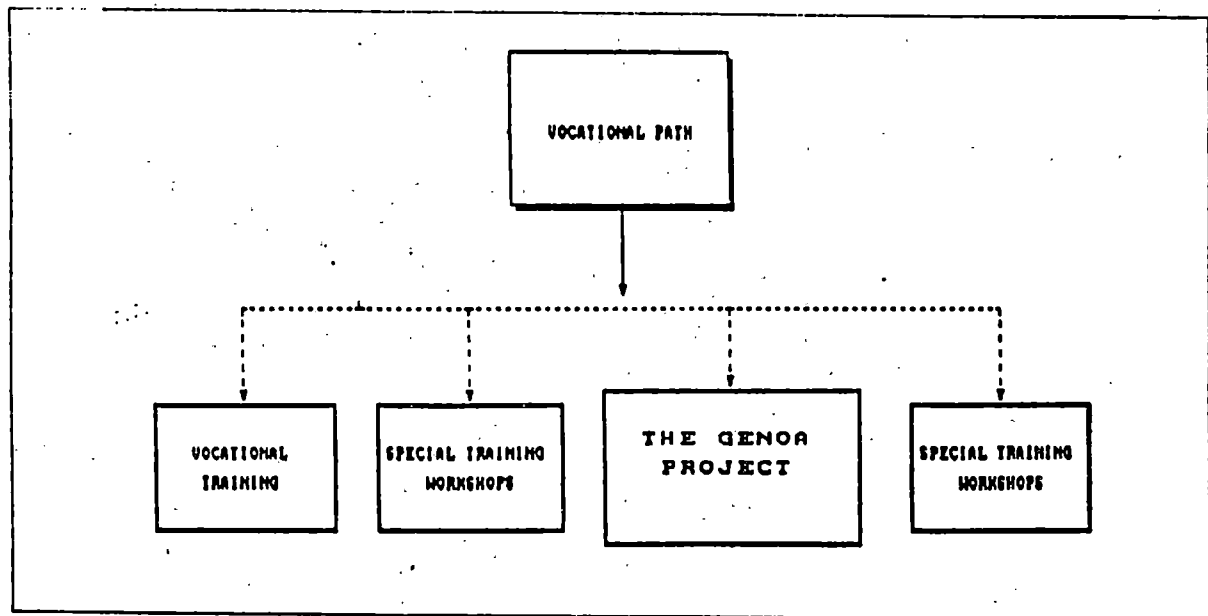
students with disabilities (usually physical disabilities) were, in fact, permitted

## ***From School to Working Life in Genoa***

to enroll in High Schools in Genoa. In 1987, however, the Italian Supreme Court ruled that the national school integration law applied not only to elementary and middle schools but to all public high schools. Implementation of the 1977 ruling has varied significantly within Italy. In Genoa, significant progress has been made in increasing the numbers of physically disabled and mildly mentally disabled young persons who are now enrolling in high school programs.

### ***THE VOCATIONAL PATH***

Disabled students who graduate from middle school programs in Genoa may elect to enroll in upper-secondary vocational programs of three basic types: (1) Work Experience Programs; (2) Integrated Vocational Training Programs; and (3) Special Training Workshops. In addition to these vocational programs, the Italian Parliament in 1968 created an "Employment Quota" Program which requires employers to ensure that at least 10% of all employees are persons who are members of certain disability categories (see Figure 9).



**Figure 9 – The Vocational Path**

## ***From School to Working Life in Genoa***

### **Work Experience Programs**

The local Ministry of Labor in Genoa has developed and operated an innovative summer work experience program for students with disabilities who have graduated from the public compulsory school system. Most of the work opportunities within the program are agricultural. Students are given lodging and board by farm families who also provide on-the-job training and monitor performance on a wide variety of agricultural work tasks. Families are paid a modest sum by the ministry to participate in the program.

The Work Experience Program operates for an 8 to 12 week period. In most instances, the young persons with disabilities receive a direct stipend from the ministry. The program has proven particularly effective in assisting young persons with disabilities develop independent living skills.

### **Integrated Vocational Training**

Ordinary vocational training is provided to both disabled and non-disabled students in publicly operated Vocational and Technical Schools. These schools offer two to three years of specialized training in a wide range of commercial and industrial areas. Vocational instruction is provided through a combination of classroom-based and on-the-job training, conducted in a variety of regular (i.e., integrated) employment settings. Academic instruction is not routinely provided within vocational and technical school programs. Most students with disabilities participating in ordinary vocational training enter the competitive workforce at the completion of the program.

## ***From School to Working Life in Genoa***

### **Special Training Workshops**

Students between the ages of 15 and 17 with severe social and/or behavioral problems (including both disabled and non-disabled students) may also enroll in a special "partially sheltered" vocational training program upon completion of middle school. This program is supported in part by the Ministry of Health and Social Services and by a special grant from the European Economic Community (the Common Market).

The twin goals of the Special Training Workshops are the development of social (i.e., how to get along with teachers and co-workers) and work (i.e., how to use tools, how to carry out work assignments) skills rather than the acquisition of specific job skills. Four Workshops are operated by the local health agency within Genoa in different parts of the city. Young people with mild and moderate disabilities are distributed among the workshops in "natural proportion". Young persons with severe disabilities are assigned to only one of the workshops.

The Special Training Workshop program consists of three phases. During the first phase, both work skill preparation and academic instruction are provided to small groups of students who are assigned to a two-person training team. Following the completion of the initial training phase, students are assigned to a specific work activity within the workshop on a full-time basis. Work performed within the workshop is supervised by a work training instructor, and students are paid a small stipend for the work performed during this phase of the program. The first two phases of the workshop program last between six months and two years.

Upon completion of the work activity phase, students are placed in a series of short-term apprenticeships. During these apprenticeships, the employer pays the student 25% of the regular wage and the local health agency contributes 75%. In most instances, during one of the apprenticeship "rotation" workshops, students are offered permanent, full-time, competitive employment.

## ***From School to Working Life in Genoa***

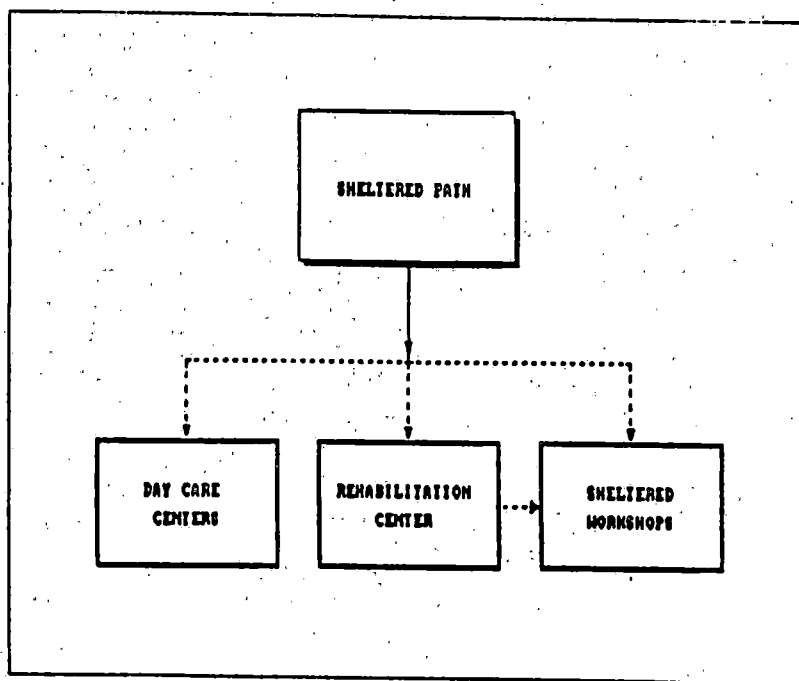
### ***THE SHELTERED PATH***

Within the City of Genoa, the Sheltered Path to employment opportunities for young persons with disabilities (usually persons with mental retardation or multiple disabilities) is comprised of three components: (1) Sheltered Workshops; (2) Rehabilitation Centers; and (3) Day Care Centers (see Figure 10). At present approximately 250 young persons with disabilities participate in these programs. Genoa officials estimate, however, that an additional 250 young persons with disabilities who leave compulsory school are currently on "waiting lists" for initial entry into Sheltered Path programs.

#### **Sheltered Workshops**

Five Sheltered Workshops are currently operated in Genoa by the National Family Association ("ANFFAS"), an association comprised primarily of the parents of disabled children. The workshops provide sheltered employment for approximately 150 young adults with disabilities, most of whom entered the workshops upon the completion of middle school.

Each Sheltered Workshop provides individualized vocational training for newly enrolled employees. The length of the vocational training



**Figure 10 – The Sheltered Path**

### *From School to Working Life in Genoa*

provided by the workshop ranges from two weeks to several months, depending on the entry level work and job skills of the individual. Because of the emphasis on social skill development in the compulsory school program, most enrollees now entering the Sheltered Workshops have good social and communication skills.

Staff of the Sheltered Workshops in Genoa report that a substantial number of the persons completing the vocational training offered by the workshops are capable of entering the Genoa Project (described in detail below) or pursuing one or more of the options within the Vocational Path (described above). At present, because of limited program capacity, only a few of these persons are actually able to "transfer" to another program. The vast majority have been placed on "waiting lists" and continue to be employed at the workshops during the "waiting" period.

The regional administration of the Ministry of Health and Social Services finances 100% of the cost of sheltered workshop services provided by ANFFAS.

#### Rehabilitation Centers

ANFFAS currently operates one Rehabilitation Center in Genoa for approximately 60 young persons with moderate and severe disabilities. The goal of the Rehabilitation Center program is to provide young persons with the work skills necessary for participation in a Sheltered Workshop program. Enrollment in the Rehabilitation Center program ranges from a few weeks to several years. On the average, approximately 15% of Rehabilitation Center students "graduate" into the Sheltered Workshops each year.

#### Day Care Centers

ANFFAS operates three small Day Care Centers in Genoa which enroll approximately 20 young persons with severe disabilities. The young persons enrolled in these, who are regarded as "incapable of working", are provided instruction in self-help skills, recreation and regular social contact with both disabled and non-disabled peers. Each center provides an eight hour program daily for from 6 to 7 young persons.

**THE EMPLOYMENT QUOTA**

A special, nationwide "quota" hiring law enacted in Italy in 1968 contributes significantly to the interest of employers in recruiting young persons with certain types of disabilities (i.e., physical and sensory disabilities) who complete vocational and technical training. Employers, at a minimum, are expected to have at least a 10% participation of disabled persons from these groups and from other priority groups (e.g., widowers, orphans) within their general labor force. The Employment Quota program has proven particularly effective in promoting the hiring of young persons with physical and sensory disabilities who pursue Vocational Path options.

In 1978 and 1979 specific circulars were issued by the Italian government excluding young persons with mental disabilities from the employment quota system. As a result of a national conference held in Genoa in the early 1980s, these circulars were rescinded and young persons with mental disabilities were briefly included within the employment quota system. The prior exclusion of these young persons was, however, reinstated by a 1987 decision of the Italian Supreme Court.

## **CHAPTER V — THE GENOA PROJECT**

The Genoa Project is a multi-faceted program serving approximately 250 mentally disabled young persons in Genoa, including young persons both with "moderate" and severe mental retardation and with chronic psychological disabilities (e.g., autism, schizophrenia). The project, which "intercepts" young people who would otherwise be assigned to long-term Sheltered Workshops (as described in Chapter IV), has, from its inception, been under the supervision of Dr. Enrico Montobbio, a psychiatrist who has dedicated his career to the economic and social integration of people with developmental disabilities.

### **OVERVIEW**

The central goal of the Genoa Project is to prepare, place and sustain young persons with moderate and severe mental disabilities in integrated and compensated employment. The Genoa Project believes that the opportunity to engage in work in fully integrated circumstances is essential to the cognitive as well as emotional development of the individual participant. To this end, the project uses a series of multi-disciplinary professional teams to assess, train and support the employment of disabled participants. Particular emphasis is placed on the thorough preparation of each disabled person for work responsibilities, careful selection of an initial, "probationary" job, and intensive ongoing attention to the psycho-social dimensions of the proposed working environment, particularly with respect to the attitudes and potential support of co-workers.

The Genoa Project has established and maintained a series of crucial linkages among public agencies, unions, employers and the families of disabled participants. The project relies upon co-workers rather than professional staff to provide job skill (as distinguished from "work skill") training and believes that

## *From School to Working Life in Genoa*

employer participation in and support for the project will only be assured if employers directly experience the project's success.

The Genoa Project begins with the selection of young persons with moderate and severe mental disabilities for project participation. Following the completion of an individualized intake assessment and a lengthy, individualized work evaluation and training effort, a determination is made by the Special Transition Team (in consultation with the participant and the participant's family) whether the participant is able to enter a one-year trial work period leading to sustained, competitive and integrated employment in the private sector. Approximately 80% of those project participants completing the intake assessment and work evaluation and training phases of the project enter the Private Sector Strategy (see Figure 11).

For those project participants determined by the Special Transition Team to be unable to pursue successfully the Private Sector Strategy, half or 10% of all project participants are referred by the Genoa Project to Sheltered Workshops (described in Chapter IV above) and the remaining 10% enter the Genoa Project's Public Sector Strategy.

The Public Sector Strategy provides sustained, compensated and integrated employment in public agencies as the project's short-term objective, with transfer to the Private Sector Strategy as a long-term goal.

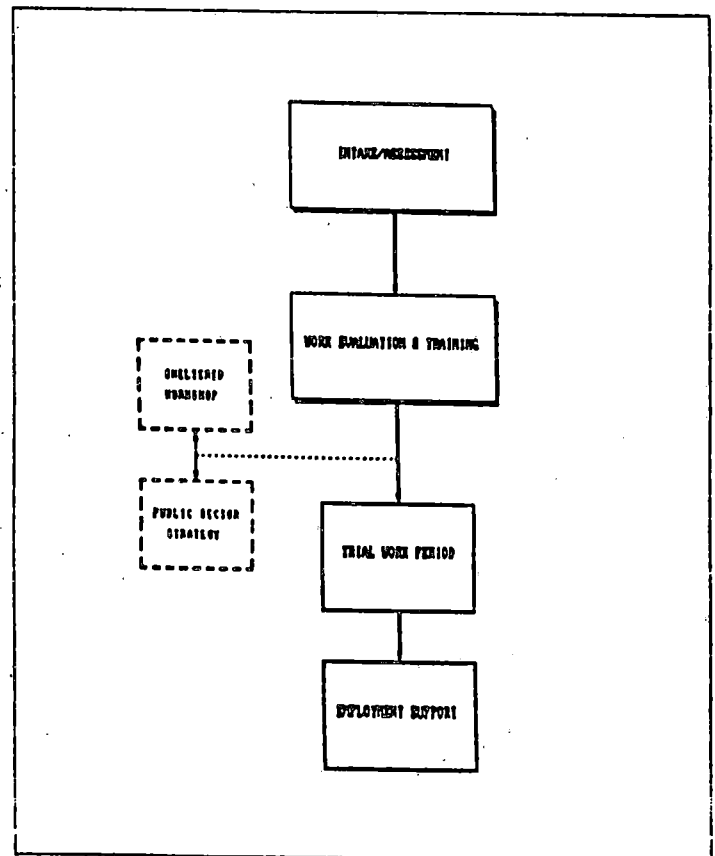


Figure 11 - Project Structure

## ***From School to Working Life in Genoa***

For the vast majority of project participants (80%) who pursue the Private Sector Strategy, Special Transition Team members devote substantial effort to match the participant (and his or her social and work skill capabilities) with an appropriate job. Once this has been accomplished, the project participant (and his or her family), the employer and the Genoa Project enter into a one-year "trial work" contract. Under this contract, the Genoa Project fully reimburses the employer for the participant's wages (through a "special grant" program) and the employer agrees to subsidize the job training and support activities of co-workers. At the end of the contract period, the employer decides whether to employ the project participant on a permanent basis. If an employment decision is made, the Genoa Project will continue to provide employment support through the Field Action Group (in concert with fellow employees) and the employer will assume full responsibility for the salary and benefits paid to the project participant. If the employer decides not to employ the project participant on a permanent basis, the Special Transition Team will reassess the situation and negotiate a "trial work" contract with another employer.

The extraordinary success of the Genoa Project is also readily apparent upon direct contact with the young persons who have formed the client population of the program. In terms of several important indicators of program success (e.g., type of work being performed, compensation and other benefits, social integration within the work environment, personal independence, personal and social behavior and self-reported information concerning living and recreational domains) the young people served by the Genoa Project have experienced a degree of overall success significantly higher than that reported or observed in virtually all American transition programs addressed to a similar client population.

To date, employers have decided to permanently employ 90% of the over 220 project participants who have completed the trial work or "contract" period and over 90% of the young persons with disabilities entering the Genoa Project have succeeded in attaining ongoing, compensated and integrated employment in either the private or public sector!

## *From School to Working Life in Genoa*

### *PROJECT PHILOSOPHY*

The principal goal of the Genoa Project is the successful integration of disabled workers in open employment, the "right place for the right person." The central philosophy underlying the project is that young persons with mental disabilities should be placed in "regular" (i.e., integrated) rather than "sheltered" (i.e., isolated) employment settings, wherever possible. This philosophy is based on four important premises: (1) work stimulates a strong motivation towards adult status; (2) a working setting does not have the infantile characteristics of the school and the sheltered workshop; (3) open employment is concerned with the exercise of a real status which is carried out according to operative necessities; and, thus (4) work in open employment is a fundamental step for mentally disabled people to acquire a social "positional" role rather than to maintain an infantile, "personal" one.

In light of this central project philosophy and based on an analysis of earlier, unsuccessful attempts to maintain disabled persons in the competitive work environment, the project design focuses on (1) the use of an extensive work evaluation and training process to identify and develop "social skills" and "work skills" (as distinguished from specific job skills) crucial to employment success; (2) the use of co-workers to provide initial "job training" and ongoing support to project participants; and (3) the creation of an ongoing "mediating" role for the project between the world of moderately and severely disabled young persons and their families on the one hand, and the ordinary world of work on the other.

### *The Importance of Integrated Employment*

The conclusion that integration in a normal (rather than "sheltered") workplace must be an essential ingredient of any successful transition approach is based on a careful examination of the role which "work" plays in attaining full "adult status". Employment in a regular setting ascribes an important role to the disabled person, perhaps the first social role in his/her life, the role of "productive

## ***From School to Working Life in Genoa***

worker". Experience has demonstrated that the assumption of this role (and all of the responsibilities attendant to it) by the disabled individual, in turn, promotes positive psycho-social development, particularly in terms of the establishment of an internal and external "adult identity".

The Genoa Project believes that employment within sheltered, institutionalized settings does not provide the same benefit to the individual because the "sheltered worker" role is not one involving real work. In contrast to regular or open employment, "sheltered workers" are often exempted from the same social rules, duties and responsibilities applicable to other workers. Sheltered workshops are also seen as encouraging habitual infantile behavior because the personnel are there "for" the benefit of the disabled person, thereby distorting the normal working relationships "with" colleagues. These profound differences between regular and sheltered employment are directly felt by the individual with disabilities. The sheltered experience often actually impedes rather than advances the process of personal maturity and identity.

Experience in Genoa has shown that the best setting for integration from the point of acquiring adult status (positional role) and promoting mature relationships is the large factory.

### **Focus on Social and "Work" Skills**

Research undertaken by the Genoa Project reveals that social and social-psychological factors rather than technical skill levels have contributed the most historically to unsuccessful attempts to integrate persons with moderate and severe disabilities into the regular working environment. Research results, for example, indicate that while co-workers tend to have a very high tolerance for problems encountered by a disabled worker related to slow comprehension of work requirements or adapting to the rhythm of work, these same co-workers showed a low tolerance for manifestations of infantile, dependent relationships.

In making work placement decisions in integrated employment settings, the Genoa Project believes that a deep understanding of the personal and emotional world of the participant is essential for integration to be successful. This social-

### ***From School to Working Life in Genoa***

psychological emphasis is viewed as crucial because, although slow intellectual development may be related to biological factors, emotional immaturity tends to be related to early childhood experience, especially the tendency of families to react to the disabled by overprotecting such children and not attributing to them responsible roles that normal children usually hold in the family and society. This over-protective approach in effect creates a "double handicap" by perpetuating a dependent relationship into adult life which plays an important role in provoking rejection in the "normal" milieu, i.e. the workplace, school, etc.

The social implications of this overly dependent behavior often are severe, particularly where unreasonable demands are placed on fellow workers, supervisors and, sometimes, customers. Recognizing that the personal dimensions of the integration in work are underestimated in the domain of the labor market where pedagogical efforts have traditionally concentrated primarily on the acquisition of skills, the Genoa Project has insisted on focusing on the development of emotional and personal maturity.

### ***The Role of Co-Workers***

Once a trial work site has been selected, the regular employees at the job-site ("co-workers") play an increasingly important role in project activities. Co-workers are provided training by the Special Transition Team and assume full responsibility for specific job skill training of project participants. Co-workers are also responsible for providing on-going technical and social support (with direct assistance from a Field Action Group) during the trial work period and thereafter.

The project's experience, to date, confirms the wisdom of separating training related to social skills and work skills from specific job skills instruction. In practice, project participants have experienced no important difficulties in acquiring needed "job" skills and, indeed, co-workers are much more likely to fully understand the needed job skills than are members of the Special Transition Team. Project experience has demonstrated that even severely mentally disabled persons can acquire working sequences which are quite complex so long as the job in question does not require the "elaboration of an excessive quantity of

## ***From School to Working Life in Genoa***

information."

The process of job-skill instruction has also led in virtually all cases to the establishment of crucially important "peer" relationships between the new disabled employee and co-workers. Young mentally disabled persons integrated into the world of work in the Genoa Project have shown a surprising capacity for learning due to the deep sense of well-being at finding themselves part of a team of workers inside a company.

### **A Mediation Role**

One of the main strategies of the Genoa Project is "mediation". Here, the role of mediator is considered to be fundamental in bringing together two incompatible elements: (1) young persons with severe mental retardation; and (2) the open labor market. Without serious mediation between these two worlds with apparently incompatible rules and needs, successful integration and transition are not possible.

The structure and operation of the Guiding Committee, the Central Coordination Team, the Special Transition Team and the Field Action Group all reflect the importance assigned to "mediation" between project participants and employers. The work evaluation and training process, for example, focuses almost exclusively on identifying and developing the skills needed to function effectively in the employment setting. Similarly, the active involvement of co-workers in job skill training and employment support ensures that constant mediation occurs between the individuals and the day-to-day demands of the workplace.

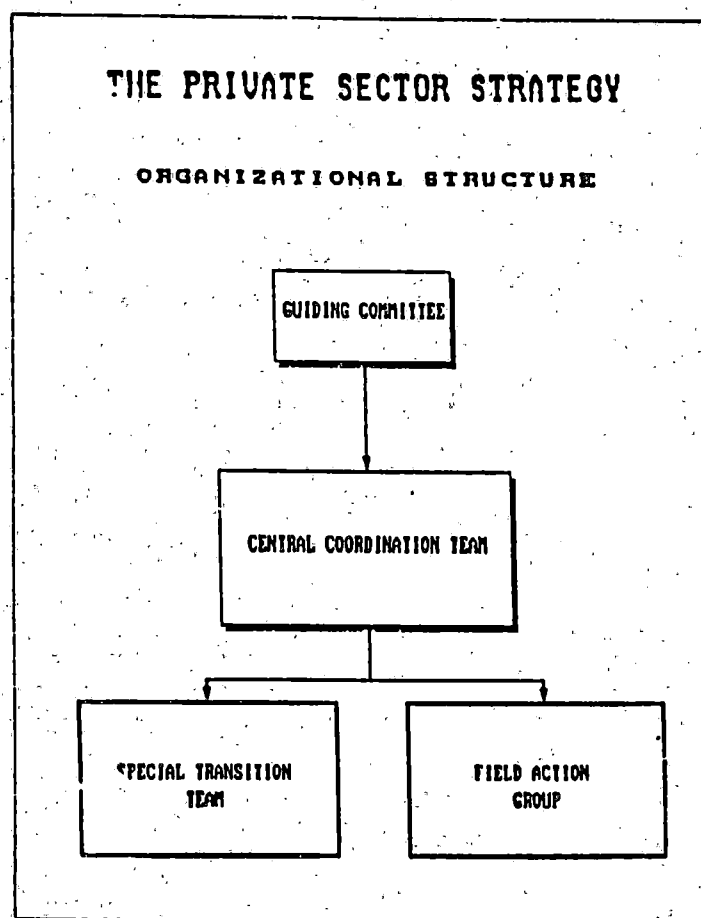
Another aspect of mediation is the way that important persons within the community are brought into the project. Such persons are almost always contacted via institutional channels. For example, contacts with employers are often made through the employer associations and contacts with workers are mediated by the preliminary involvement with unions.

**PROJECT ORGANIZATION**

The Genoa Project is a special transition project operated on a city-wide basis which provides comprehensive transition assistance to young persons in Genoa with moderate and severe mental disabilities between the ages of 16 and 24 years. The project, which is administratively "attached" to one of the local health agencies in Genoa (discussed in detail in Chapter II), is under the overall direction of Dr. Enrico Montobbio, its founder, who also serves as the Transition Coordinator for all of the local health agencies operating within the city (see Figure 12).

**The Guiding Committee**

The climate of uninterrupted political support in Genoa for the Genoa Project has contributed enormously to the project's ongoing stability and success. The principal role of the project's Guiding Committee has been to create and maintain that climate. The Guiding Committee is composed of representatives of public agencies, trade unions, chamber of commerce and employer associations, delegates from the local satellite offices of the Italian Ministry of Employment, and representatives from organizations of parents and disabled adults.



**Figure 12 – Project Organization**

## ***From School to Working Life in Genoa***

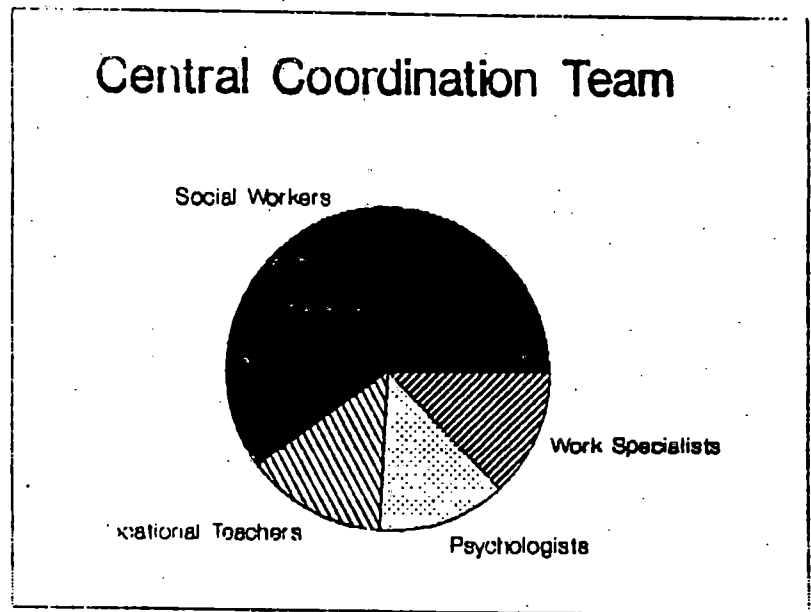
Each member of the Committee also serves as an ad hoc advisor and trouble shooter for the project. If problems arise involving the specific organization or agency represented by a Committee member, project administrators often turn to that member for assistance.

### **The Central Coordination Team**

The Central Coordination Team is the project's administrative and management arm. Operating under the supervision of the Project Director, the approximately 20 members of the team plan, supervise and monitor the overall project. In addition, members of the Central Coordination Team are responsible for coordinating (on a day-to-day basis) project activities with the programs and services provided by the various health and social services programs operated by the local health agencies throughout the city.

Members of the Central Coordination Team are employees of

the project. A majority of team members are social workers; other team members include psychologists, vocational teachers and work organization specialists (see Figure 13). As is discussed below, members of the Coordination Team also serve as members of six or seven Field Action Groups working with participants in the "trial work" and employment support phases of the Project. Team members are, thus, involved simultaneously at two different levels of the overall project.



**Figure 13 - The Central Coordination Team**

## ***From School to Working Life in Genoa***

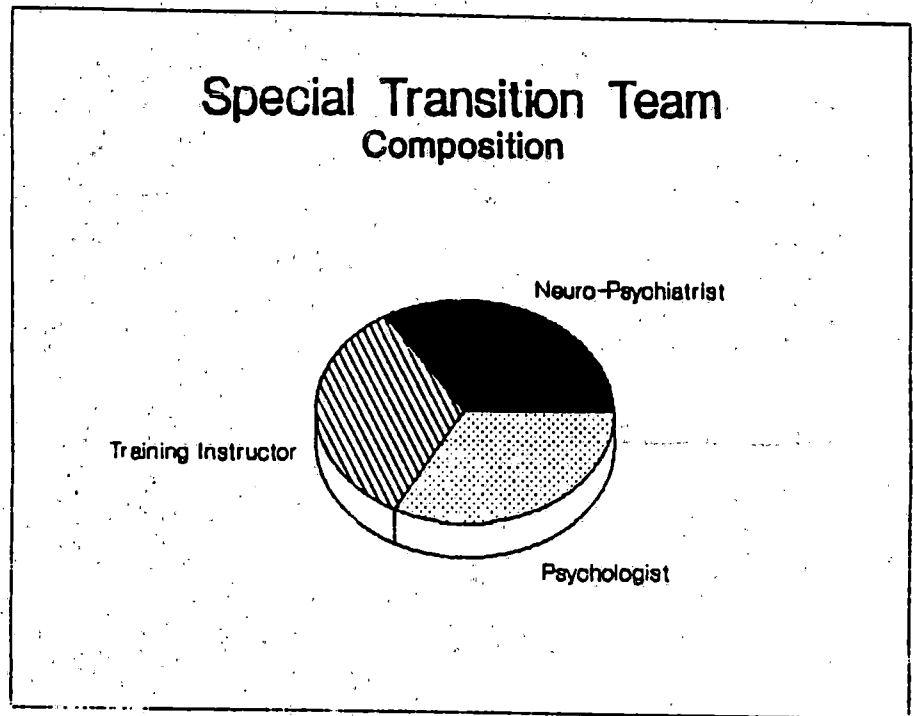
The Coordination Team conducts weekly meetings with each Special Transition Team and Field Action Group to discuss any questions which arise in the operation of the project at the participant level.

In reality, the different units of the local health agencies (described in detail in Chapter II) are or should be involved in the solution of a variety of problems which impact crucially on the overall success of the project (e.g., leisure activities, housing, individual and family therapy). When cooperation from other local health agency units appears necessary, staff of those units are invited to attend Coordination Team meetings.

According to the members of the Central Coordination Team, the heaviest burdens are the moral and the professional responsibilities involved in having to be constantly ready to solve any type of problem that may arise in the operation of the Project.

### **Special Transition Teams**

Within the Genoa Project, the responsibility for the pre-employment training of project participants rests with one of six Special Transition Teams. Each Transition Team is composed of three members and is under the direction of a neuro-psychiatrist who is also a specialist in employment



**Figure 14 - Special Transition Team**

## *From School to Working Life in Genoa*

organization (see Figure 14). Other team members usually include a psychologist and a professional training instructors (usually a social worker). The primary role of the Special Transition Team is to teach basic work skills to project participants prior to job-site integration. The enhancement of social and communication skills is also an important team goal.

Each Special Transition Team is assigned an "active" caseload of approximately 15 young persons who are participating in the Assessment and Training Phases of the overall project.

### Field Action Groups

Within the Genoa Project, Field Action Groups manage the day-to-day support which is provided by the project to assist

mentally disabled persons who are working in public or private employment settings as a result of project activities (i.e., during the Trial Work and Employment Support Phases of the project). A separate Field Action Group is formed for each employer participating in the "trial work" activities of the Project.

The membership of each Field Action Group includes two members of the Coordination Team (a social worker and an instructor), a representative from the management staff of the participating employer and a trade union representative

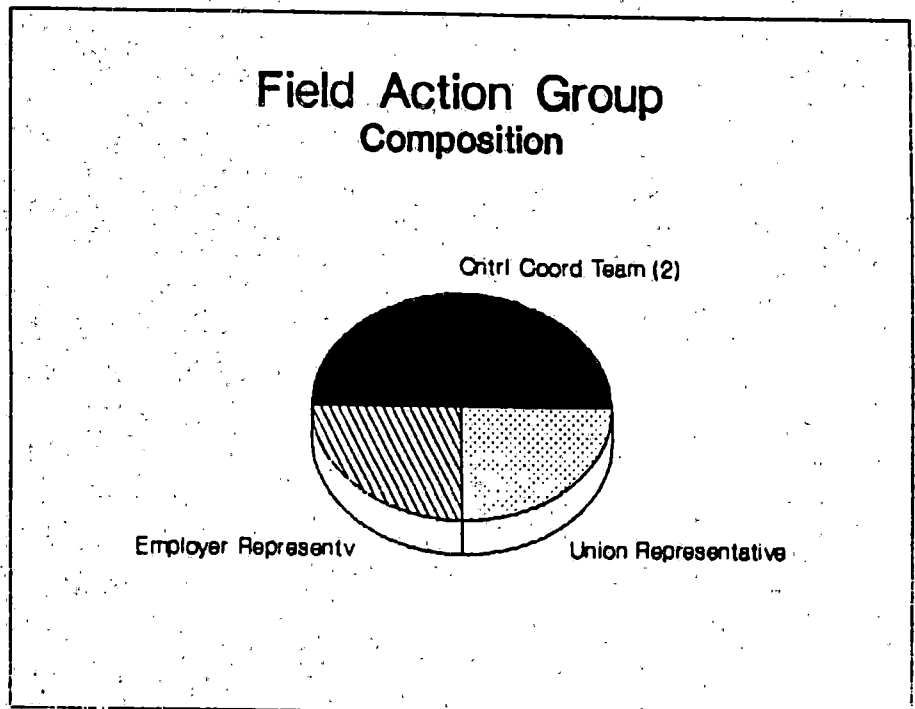


Figure 15 - Field Action Group

## ***From School to Working Life in Genoa***

of the workers employed at the job site (see Figure 15). The primary responsibilities of each Field Action Group relate to "transition" problems which may arise for a project participant at the work place. Field Action Groups are expected to identify and analyze problems which have or may develop in an effort to quickly find and implement a solution. Field Action Groups may seek advice or support from the Central Coordination Team through joint discussion.

Each project participant is assigned to one of the six groups at the beginning of the one-year work placement phase of the project. At present, Field Action Groups have a caseload of approximately seven project participants in the trial work phase and 20-25 former project participants in permanent employment.

### **PROJECT STRUCTURE**

The goal of the Genoa Project is sustained, integrated and compensated employment for young persons with moderate and severe mental disabilities. The Genoa Project may be conveniently divided into four principal operational activity components:

- (1) The Intake/Assessment Phase;
- (2) The Work Evaluation and Training Phase;
- (3) The Private Sector Strategy; and
- (4) The Public Sector Strategy.

As discussed above, the Intake/Assessment and Work Evaluation and Training Phases of the project are identical for all project participants. Following the completion of these phases, project participants then pursue either the Private or Public Sector Strategy or are referred to Sheltered Workshops.

### **The Intake/Assessment Phase**

The initial selection of candidates for participation in the Genoa Project is subject to a complex set of rules and admission criteria. At present all potential participants must have a moderate or severe mental disability and must be between the ages of 15-30 years. A substantial "waiting list" currently exists for

### ***From School to Working Life in Genoa***

project participation, and careful attention has been paid to resisting any pressures for favoritism.

Following initial selection, each project participant is assigned to a Special Transition Team. Team assignment is made based on the geographic location of the participant's residence.

During the first two or three months of project participation, the Special Transition Team conducts an extensive "Intake" process with each young person and his or her family. This process focuses on dynamic evaluation procedures within normal environments and includes assessments of social skills, communication skills and "adaptive behavior" ("functional skills") in a variety of community environments. The team also consults extensively with family members, teachers and other community members familiar with the young person, and special attention is given to understanding the psycho-social background, incentive-motivational, learning and communication "styles" of the participant.

The primary goal of the "Intake" process is to create a comprehensive picture of the current functioning of the new participant in a variety of social settings and community environments. The emphasis of the process is on identifying strengths and "abilities" rather than deficits or disabilities.

### **The Work Evaluation and Training Phase**

Upon completion of the Intake Process, the Special Transition Team prepares an individualized work evaluation program for each project participant. The goal of the overall work evaluation process is to identify the specific work and social skill "training" needs of each participant in order to function successfully in regular, competitive employment. The concept of "work skills" includes a knowledge of the rules of jobsite and the language of the work environment, and the capability to conform to the socialization practices expected within the work environment between employees and supervisors, employees and co-workers, and employees and customers or clients.

The basic structure of the work evaluation and training process involves the assignment of the participant to a series of short-term work experience activities.

## ***From School to Working Life in Genoa***

In each of these activities, Special Transition Team members initially assess the social and work skill demands, evaluate the performance (including productivity, co-worker and supervisor interaction and job satisfaction) of the project participant (in consultation with the "temporary" employer and co-workers) and identify specific skill needs. Appropriate training is then provided by team members and another short-term work experience rotation is planned.

Work evaluation rotations are usually made for a 4-6 month period from among a wide range of jobs available at over 25 integrated employment sites (e.g., factories, businesses) which have agreed to participate in the work evaluation process. The large number of available work evaluation options permits the Special Transition Team to pursue an individualized, flexible, diagnostic/prescriptive approach to the identification and development of crucially important work (as distinguished from specific job) skills, and related social, learning and communication skills.

Because of the individualized nature of the work evaluation process, the time required by project participants to complete the process varies from two weeks to as long as four or five years. Project participants receive a small hourly stipend from the Genoa Project for work performed during the work evaluation process.

When the Special Transition Team concludes that the work evaluation process has been completed (i.e., the social and work skill preparation of the project participant has been optimized), a decision is made as to whether there is any reason why the project participant should not enter the project's Private Sector Strategy. The alternative courses of action are entry into the project's Public Sector Strategy or referral to a Sheltered Workshop program.

### **The Private Sector Strategy**

The goal of the Private Sector Strategy is integrated, compensated employment within the competitive labor market. The strategy consists of three basic components: (1) job identification; (2) trial work; and (3) ongoing employment support.

## **JOB IDENTIFICATION**

The job identification goals of the Field Action Groups are to identify companies likely to co-operate in employing persons with disabilities, to analyze the organization and to seek out suitable jobs and functions. Representatives of employer associations, local unions and the local branch of the Ministry of Labor serve as members of the Guiding Committee and provide the Genoa Project exclusive economic, financial and technological information concerning individual firms, as well as an inside view of organizational patterns, the workings of social networks and attitudes of workers toward disabled people.

Each of the Field Action Groups is responsible for identifying specific jobs within the overall workforce of participating employers which can be filled by project participants during the Trial Work Phase of the project. The employment or work specialist attached to each team undertakes the job identification task in concert with the management and trade union members of the Group who use an extensive network of job site "contacts" to identify specific job vacancies as they occur. The most important factors in successful job identification are the immediate availability of information on new job vacancies and full knowledge of the Genoa Project structure and operations.

The Genoa Project is committed to the principle of "natural proportion" of disabled and non-disabled persons in the workplace rather than the creation of a special work "enclave". In practice, there is usually no more than one project participant working at the same work site.

Once a prospective employer has been identified, the employer is sent a written description of the project along with a letter of presentation from the Central Coordination Team. A few days later project staff request a meeting to discuss the project in detail with both the employer and appropriate union representatives. If an agreement is reached regarding project participation, the Field Action Group assigned to that employer assesses the feasibility of filling existing job vacancies with project participants and the desirability of restructuring current jobs.

The job analysis and workplace assessment includes a careful task analysis of existing job structures. Tasks are split into single operations and an analysis

## *From School to Working Life in Genoa*

of the information and skills needed to perform each of them is made. These information and skill demands are then matched against the general information and skill profiles of project participants. In addition, careful attention is paid to four additional factors: (1) the potential danger to the prospective participant-employee and co-workers incident to job performance; (2) the difficulty and complexity of the job in terms of technological demands; (3) the difficulty and complexity of the job in terms of the organizational patterns of the workplace; and (4) the receptivity ("climate") of the social networks within the workplace.

Following the completion of the job analysis and workplace assessment, the Field Action Group meets with representatives of the Special Transition Teams in an attempt to identify a suitable candidate for the job among current project participants. This selection involves the consideration of several factors, including age, skills and abilities, psychological and behavioral traits, distance from work and family conditions.

### **TRIAL WORK PERIOD**

The purpose of the one-year trial work period is to provide the young person with disabilities and his family, on the one hand, and the employer and other workers on the other hand, with the experience of working together in a real employment setting without an employment which is final and irreversible. This period is viewed as a time for gradual adaptation, understanding and learning to work together.

Once a project participant who has completed the Work Evaluation and Training Phase has been matched with a job vacancy, the project participant is assigned to a Field Action Group (described in detail above). A contract is then prepared by the Field Action Group for signature by the employer, the project participant (and his or her parents) and the member of the Field Action Group assigned primary responsibility for providing employment support during the trial work period.

The written contract spells out the conditions of the project and rules of behavior to be respected. For example, it is agreed that once placement is made, the family will not have direct contact with the employer but will address all

### *From School to Working Life in Genoa*

questions and problems to the Field Action Group, who are in the position to mediate between the family and the employer. It is felt that if the individual is to acquire status as an adult within the workplace, then it is necessary to separate this from the family situation, where he may still be considered a child.

The contract is neither extendable nor renewable and its terms cannot be modified during the trial work period. In the case of failure, for example, the contract may be terminated but the terms of the agreement may not be modified. The purpose of this apparent inflexibility is to avoid employers attempting to extend the special grant over the one-year limit or asking for systematic support from the service even after the end of the trial period. It is also a way of clarifying each party's responsibility and, therefore, defines the boundaries for successful integration.

Under the terms of the contract, the Genoa Project assumes primary responsibility for the trial period and undertakes to provide professional advice and support. During the trial work phase, the Genoa Project also bears all civil liability related to the work performance of the project participant. The contract provides that a stipend of 250.000 lire/month will be paid to the employer who then pays it as a wage to the disabled worker. During the trial work period the project participant is introduced into the workplace with the legal status of a student-apprentice. The participant is obliged to respect the employer's regulations and accomplish the specific tasks which are assigned.

The work specialist member of the Field Action Group is responsible for improving worker awareness and securing good relations with the employer's management hierarchy. Another group member, the professional training instructor, accompanies the disabled worker on his first day at work and supervises, directly or indirectly, his period of apprenticeship. These two members of the Field Action Group are jointly able to give a professional interpretation of the world of work from an organizational and ergonomic point of view and, equally, to comprehend fully the structural characteristics of the disabled person. They are, therefore, well-qualified to ensure the success of the integration of the individual best suited to a position.

On the first day of work, the individual is accompanied to the work place by

## ***From School to Working Life in Genoa***

a member of the Field Action Group. This provides an opportunity both to assess the family's attitudes and fears concerning the new experience and to reassure them. In addition, difficulties that may be encountered in getting to the work place can be identified and resolved. Few problems of this type usually occur because the team has acquired significant expertise through experience. Although regular employment support is available from the Field Action Group during the trial work period, the aim is to gradually withdraw as soon as possible. Such support varies flexibly from routine monitoring by the Field Action Group to joint involvement of the Central Coordination Team in exceptional cases. If regular support is still necessary after one year, then the trial work experience is considered as having failed.

At the conclusion of the one-year trial work period, a joint decision is made among the parties to the trial work contract as to whether the participant will be permanently employed. If permanent employment is considered feasible, then the project participant will be hired under the same terms and conditions that would apply to any other worker. In practice, 93% of the project participants completing the trial work period have been permanently employed. This remarkable success appears to be attributable to four crucial elements of the project design:

- (1) The major concentration on social skills and work skills during the training phase;
- (2) The strong bond that develops between the project participant and his or her co-workers and the direct involvement of the unions throughout the trial work period;
- (3) The role of the Guiding Committee and the pride taken by employers in permanently employing project participants; and
- (4) The inflexibility of the contract period coupled with the project's refusal to offer an employer future trial work employees if there is an indication that the employer is simply looking for a series of "free" internships.

## **EMPLOYMENT SUPPORT**

If a project participant is permanently employed by an employer following the completion of the trial work phase, the Field Action Group will provide employment support during the period of permanent employment. This ongoing employment support is not provided on a regular basis. Rather, during the first 3-5 years of employment, the Field Action Group provides intermittent support (usually on a "crisis intervention basis") whenever it is needed to assist the project participant to sustain permanent employment.

The types of services which may be provided during the Employment Support Phase include personal and job counseling, adjustments to job change or restructuring and co-worker support training.

### **The Public Sector Strategy**

The goal of the Public Sector Strategy is integrated, compensated employment within non-competitive, public employment for those project participants for whom it is determined by the Special Transition Team that private sector competitive employment is infeasible in the short-term.

The Public Sector Strategy follows the basic job identification process outlined above, except that the responsible Field Action Group identifies suitable job vacancies (and potential job restructuring) within public (regional and local) agencies within Genoa.

Once a potential job is matched with an appropriate candidate within the project, a contract is prepared by the Field Action Group for signature by the public employer, the project participant (and his or her parents) and the member of the Field Action Group assigned primary responsibility for providing ongoing employment support. The contract is of indefinite duration and spells out the conditions of the project and rules of behavior to be respected. Unlike the contract used in the Private Sector Strategy, the terms of the public sector contract may

### *From School to Working Life in Genoa*

be modified during the indefinite employment period as conditions warrant.

Under the terms of the contract, the Genoa Project and the other public agency involved share responsibility for the employment of the project participant. The Genoa Project agrees to provide professional advice and support for as long as may be necessary. The contract further provides that a stipend of 250.000 lire/month will be paid to the public employer, who then pays it as a wage to the disabled worker. Depending on work performance and interest, project participants pursuing the Public Sector Strategy may reenter the Work Evaluation and Training Phase (described above) in an effort to "transfer" into the Private Sector Strategy.

### TRAINING OF PROJECT STAFF

Members of the Special Transition Teams and Field Action Groups receive initial orientation from project staff when they are first hired. This orientation explains but does not specifically prepare the new team member in any special way for the work to be carried out. One of the Genoa Project's major concerns has been the lack of experience or formal training of team members concerning the nature of factory work environments and the language of the workplace.

In most cases, specific expertise is acquired through a combination of on-the-job training (principally by co-workers) and in-service training. A need for greater expertise has been identified by project staff in areas related both to the working environment (such as new patterns of work organization and new technology) and to project participants (such as learning processes, emotional development, and behavior patterns in relation to group dynamics).

In response to these needs, a training program in new patterns of work organization and new technology has been developed in concert with a well-known research institute in Milan. Team members have also established an in-service training program whereby theoretical models are examined against day-to-day experience in a manner which allows for a much greater understanding of the personal and social dynamics of project participants.

## **CHAPTER VI – OUTCOMES AND IMPACT OF GENOA PROJECT**

Over the last decade, the Genoa Project, in concert with the Italian approach to pre-school, elementary and middle school education, has yielded extraordinary success in supporting (in a highly cost-effective manner) the transition of young persons with moderate and severe disabilities from school to gainful employment and integrated community life.

### **EMPLOYMENT OUTCOMES**

One of the most impressive features of the Genoa Project is its documented and unparalleled success in making and sustaining work placements in competitive employment. Despite an unemployment rate for the city in excess of 12%, the Genoa Project has placed over 300 young persons with moderate and severe mental disabilities in integrated, compensated and competitive employment, with approximately a 95% job retention rate over the first three years of employment.

### **COST EFFECTIVENESS**

A study of the cost effectiveness of the Genoa Project over the period 1978 to 1984 demonstrated a net savings to local government agencies generated by project activities of approximately \$3,000,000. This figure was arrived at by comparing the costs of the project (i.e., participant stipends, staff salaries and service expenses) with the costs which the city would have incurred if project participants had been originally referred to sheltered workshops.

## *From School to Working Life in Genoa*

### RELATIONSHIPS WITH FAMILIES

One of the hallmarks of the Genoa Project is its concern for the young person with disabilities as part of a family unit. In terms of project philosophy, the Genoa Project believes that each young person with a disability should be viewed as a "whole" person. Accordingly, while the project focuses primarily on sustained, integrated employment, the Special Transition Team and the Field Action Group devote a significant amount of time to work with the family in order to ensure that the newly acquired social role (i.e., "productive worker") of the adult child is also respected and maintained in the home.

The Genoa Project has also developed an excellent strategy for enlisting parents who appear uninterested or reluctant to have their children participate in the overall program. When Special Transition Team or Field Action Group members encounter problems of this type, local parents' associations are used to "mediate" contacts between individual parents and project staff. The Genoa Project also plays an important "mediating" role between the family and the employer during both the Work Evaluation and Trial Work phases.

The Genoa Project has also developed an innovative "family adoption" program for young persons with disabilities who enter the project from institutional settings. This strategy helps create a natural family environment for the project participant during the course of the project and thereafter.



## **CHAPTER VII - TRANSITION IN AMERICA: PROGRAM IMPLICATIONS**

Having reviewed the basic elements of the Genoa Transition Approach, the question logically arises as to implications for education, employment and human service programs in the United States. In this chapter, the current ineffectiveness of American transition efforts targeted on children and young adults with disabilities is assessed and then analyzed in terms of contributing structural and programmatic factors. Following this analysis, the elements of the Genoa Transition Approach which might respond most directly to these identified weaknesses are summarized and the potential benefits of replicating or adapting the elements for use in American programs is briefly discussed.

### **"TRANSITION" IN AMERICA**

In remarks on the signing of a 1983 proclamation establishing the National Decade of Disabled Persons, former President Ronald Reagan expressed concern about the negative consequences for persons with disabilities of the patchwork nature of Federal disability policies and programs and the absence of effective program integration and coordination. The President also stressed the importance of "returning to our traditional values of self-reliance, human dignity, and independence" if we are to "replace chaos with order in Federal programs." (Presidential Proclamation 5131).

*The Current Effectiveness of Transition*

Extraordinary developments in medical and vocational rehabilitation programs and in education, habilitation and employment transition strategies during the last decade have demonstrated convincingly that a very high percentage of persons with even the most severe disabilities can reach or be restored to work capacity sufficient to achieve gainful employment. One reason for the dramatic expansion of our awareness of the work potential of persons with severe disabilities has been the extraordinary success of "supported employment" and "independent living" strategies.

However, the National Council on Disabilities reported in 1986 that only one-third of youths with disabilities leaving school graduate to a job or some form of advanced education and attributed this high rate of unemployment to "the lack of an effective transition process from school to work for youths with disabilities (Toward Independence, page 22). The council has directly attributed this outcome to the "absence of a systematic vocational transition process for youths with disabilities", and recommends that Congress direct the Department of Education to require State and local education agencies to initiate and carry out the transition process, "including contacting the appropriate personnel in regular and special education, vocational education, vocational rehabilitation, community colleges, developmental disabilities and other agencies from whom each student receives services" (Id., pages 22-23).

The Disability Advisory Council, a commission established by Congress in 1986 to study and report to Congress on the current effectiveness of vocational rehabilitation, SSDI, SSI and related medical benefit programs in supporting

### ***From School to Working Life in Genoa***

transition from unemployment to work, addressed the issue of the coordination of Federal disability programs serving school age SSI beneficiaries with developmental disabilities in its 1988 Report to Congress:

"Many children with developmental disabilities now leaving secondary school have significantly benefited from the passage of Federal and State equal opportunity laws, but few make a successful transition from school to sustained, gainful employment. It is estimated that in 1986, over 90 percent of these special education graduates left school for one form of dependency or another". Report of the Disability Advisory Council, pages 21-22.

The Council attributes this and other major problems to what it describes as the "fractionalization" in the administration of Federal disability programs (Id., pages 16-17).

Thus, both the ineffective coordination and integration of current programs and serious program design flaws (particularly, related to program flexibility and continuity) have had a severe, adverse impact on the "transition" of school age clients from school to gainful employment.

#### **Ineffective Coordination and Integration of Programs**

In a February 1986 Report to the President, Toward Independence, the National Council reported that "disabled people around the country declared that many programs do not mesh well with other available services, and that too often the service delivery system exhibits gaps, inconsistencies and inequities" (Page 58). In 1988, in its second Report to the President, On the Threshold of Independence, the same council observed that: "Many instances of gaps in services, as well as duplicative services, are evident across the country" and declared that "Coordinated efforts could resolve some of these problems" (Page 89).

The Disability Advisory Council recommended to Congress in March 1988 that significant changes be made in several Federal disability programs in order to ensure the effective coordination of services to these young persons and their families prior to, during and after transition from school to gainful employment (Chapter 2, page 24).

## ***From School to Working Life in Genoa***

These and other studies conducted during the last decade have demonstrated that services needed by young persons with disabilities and their families to prepare for, support and sustain transition from school to work were frequently unavailable for two principal reasons: the inaccessibility of the service system to clients and their families, and the dispersion of management responsibility among a variety of loosely aggregated programs.

### **INACCESSIBILITY OF THE SERVICE SYSTEM TO CLIENTS**

Young persons and their families most frequently do not have access to an individual who is in any real sense either accountable for identifying the range of services needed by the individual or the family or given the cross-cutting responsibility and authority to oversee the provision of appropriate services. In addition, the current structure of disability programs works against the "empowerment" of young persons with disabilities and their families to access services directly.

The lack of involvement of clients in agency planning, decision-making and "quality control" activities directly impedes the effective coordination and integration of services and benefits at the client service level. Each of the traditional values referred to by President Reagan is abandoned when government programs organize and provide services to individuals in the absence of collaboration, cooperation or even consultation. Indeed, the lack of client involvement in decision-making is directly inimical to an underlying service goal (i.e., adult status, self-advocacy).

### **DISPERSION OF MANAGEMENT RESPONSIBILITY**

The dispersion of management responsibility and authority for program implementation among a variety of State and local agencies has created what one analyst has termed a "loose aggregation of independently functioning units". Noble, J. & Conley, R., "Severely handicapped Americans: Victims of outmoded

### ***From School to Working Life in Genoa***

policies," in Handbook of Rehabilitation Medicine, Goodgold, J. (Ed.), St. Louis (1988). This dispersion has also led to the extreme compartmentalization of disability programs. For example, the current lack of coordination among the three most important Federal disability "service" programs for school age clients (i.e., the Education of the Handicapped Act (P.L. 94-142), the Federal/State vocational rehabilitation programs, and the Developmental Disabilities program) is exemplified by basic aspects of the current structure and operations of each of these programs.

For example, P.L. 94-142 makes no direct reference to transition from school to work and adult life, and only a few states have passed legislation during the past decade designed to create comprehensive and coordinated (among the variety of responsible agencies) "transition" services. The Developmentally Disabled Assistance and Bill of Rights Act established a nationwide program of assistance to States in developing comprehensive plans for meeting the needs of developmentally disabled persons within the State but left control over the financial resources to implement such plans with the State Medicaid agency not the State Mental Retardation agency. While Congress created a priority within the Federal/State vocational rehabilitation system for serving persons with severe disabilities, the basic eligibility criteria for vocational rehabilitation services (i.e., the ability of individuals to achieve gainful employment as a result of the provision of vocational rehabilitation services) continues to inherently disadvantage those clients who have been least well-served by the public schools (i.e., those in need of long-term services who are least likely to be quickly "rehabilitated").

In sum, four specific deficiencies in program coordination and integration appear to have directly and significantly contributed to the ineffectiveness of current Federal disability programs targeted on the "transition" population:

- (1) The absence of comprehensive individual transition planning (both during school years and afterward) and the resulting reliance on fragmented, unfocused planning procedures.

## ***From School to Working Life In Genoa***

(2) Inadequate secondary school preparation, illustrated chiefly by the failure to establish post-school goals which form the basis for the establishment of both annual goals and short-term instructional objectives within the IEP.

(3) The abrupt discontinuation of the P.L. 94-142 entitlement approach at a crucial developmental period and the resulting, "selective" nature of vocational rehabilitation and developmental disabilities services.

(4) The absence of parent and family involvement and the failure to incorporate (and to support the development of the skills necessary to permit) effective self-advocacy and self-determination in the identification of work and community life goals, the determination of service strategies and the selection of service providers.

### **Inflexibility and Lack of Continuity of Current Programs**

Recent reports issued by the National Council on Disability (formerly the National Council on the Handicapped) and by the Disability Advisory Council of the Social Security Administration reveal two major program design problems which contribute directly and significantly to the ineffectiveness of current transition efforts for young persons with disabilities:

(a) The unavailability of effective job training and supported employment services within the current universe of programs.

(b) The ineffectiveness of the SSA/VR referral system.

### **JOB TRAINING AND SUPPORTED EMPLOYMENT**

The Job Training and Partnership Act ("JTPA") program administered by the U.S. Department of Labor supports the operation of local job training projects (directed by local Private Industry Councils) to increase the employment of persons who are unemployed. At present, no formal coordination arrangements exist between local JTPA programs and the Federal/State VR systems or the regular or special

## *From School to Working Life in Genoa*

vocational education administered by local school districts.

As a result of the absence of program coordination and the use of income eligibility criteria which penalize persons with disabilities (because of the receipt of cash benefit payments), the National Council on Disability ("NCD") has concluded that the JTPA program does not adequately serve persons with disabilities (Toward Independence, page 26). NCD recommends that Private Industry Councils place a priority upon the participation of disabled persons in JTPA programs and that JTPA programs expand to include vocational education and vocational rehabilitation components appropriate to the needs of persons with disabilities.

The term "supported employment" means a program for persons with disabilities for whom competitive employment at or above the minimum wage without support is unlikely. Supported employment involves the provision of intensive ongoing support (including supervision, training and transportation) to individuals to perform in a variety of work settings, including work settings in which non-disabled persons are employed. This range of services has included direct job support and supervision during initial on-the-job training and orientation, periodic and/or intensive, short-term job coaching services as employee responsibilities are expanded or if work performance problems are encountered, counseling and transportation. Supported employment initiatives have concentrated on the community-based development of job skills (including basic job-related behavior and co-worker interaction) and related independent living skills and have presented employers with a range of separately funded post-employment support services.

Supported employment services may be financed under several different Federal disability and "generic" programs, including Titles I and VI of the Rehabilitation Act, Title XIX ICF/MR and Title XX of the Social Security Act (Toward Independence, page 24). At present, no coordination exists among these programs regarding the planning and provision of supported employment services.

### **THE INEFFECTIVENESS OF THE SSA/VR REFERRAL SYSTEM**

In furtherance of the employment related goals of the SSDI and SSI cash and medical benefit programs, Congress enacted legislation requiring the Social Security Administration to "refer" all Social Security Disability Insurance ("SSDI") and Supplemental Security Income ("SSI") beneficiaries who it determined might achieve substantial gainful employment to the State VR agency for rehabilitation services. A very high percentage of young persons with moderate and severe disabilities leaving secondary special education programs are eligible for benefits under one or both of these programs.

SSA studies reveal that when VR services are successfully provided to SSDI and SSI beneficiaries the positive results both for the individuals involved and for the Trust Fund or general revenues are impressive. Recent information collected by SSA shows a benefit recidivism rate of less than 8% for SSDI and SSI beneficiaries who achieve gainful employment with substantial savings in SSA cash and medical benefit payments. Indeed, SSA has calculated a return of approximately \$2.70 for every dollar expended for successful VR services. As the years of gainful employment for those who have benefited from SSA funded VR services increase the dollar return will rise dramatically.

Under SSA's current VR referral programs, however, only a small percentage of disability applicants and beneficiaries are referred for VR services by State disability determination ("DDS") units and few of those referred ever receive such services. In 1986, nationwide, only 12.1% of all persons submitting allowed SSDI and SSI applications were referred by DDS units for employment services and fewer than 15% of those referred for services ever actually entered the VR system. The inefficiency of this referral process is particularly troubling because in many states the DDS unit and the State VR agency are organizational components of the same agency.

The Rehabilitation Act, in fact, requires that severely handicapped persons (including all SSDI and SSI applicants referred by DDS) be afforded the highest service priority by the Federal/State VR system. In addition, SSA reimburses State

## ***From School to Working Life in Genoa***

VR agencies for a portion of the expenditures made by that agency for services successfully provided to referred applicants or beneficiaries who achieve substantial gainful employment (as defined by SSA standards) for a period of nine months.

The Disability Advisory Council in analyzing the current operation of the SSA/VR referral system concluded that for SSI beneficiaries "appropriate and timely VR services, including habilitation services for SSI recipients who may never have worked, can help move such beneficiaries into the workforce" (Report of the Disability Advisory Council, pages 19-20). Despite uniform SSA referral guidelines (and model criteria) a highly variable DDS referral rate exists among states, and much of this variation appears to be attributable to differences in VR service capacity and service priorities. Current information collected by SSA strongly indicates that many DDS units refer substantially more applicants for employment services than could be accommodated within the existing VR system (particularly with respect to counselor caseload capacity) on the expectation that only a small percentage of persons served will ever pursue VR services. Current law, in fact, requires that severely handicapped persons (including all SSDI and SSI applicants referred by DDS) be afforded the highest service priority by the Federal/State VR system. Indeed, some DDS units only refer SSDI and SSI applicants for employment services.

At present SSA does not track persons referred by DDS units for employment services in order to see if such services are actually requested and/or provided. SSA also does not attempt to evaluate, either periodically or on an ongoing basis, the "quality" of employment services provided (in terms of their actual contribution to restored work capacity or subsequent gainful employment) or their cost-effectiveness.

Last year, Congress made permanent several important provisions contained in Section 1619 of the Social Security Act which dramatically reduce the work disincentives presently built into the SSI/Medicaid benefit program. Section 1619(a) allows an SSI beneficiary, whose impairment continues, to earn above a fixed minimum level (now at \$300 per month) and continue to receive both cash benefits and Medicaid coverage. Until the enactment of Section 1619, any earned

## ***From School to Working Life in Genoa***

Income above \$300 per month could result in immediate termination of benefits under both programs. Under the new provisions, SSI benefits are reduced gradually as earned income increases, and eligibility for medical benefits (under Section 1619(b)) may continue even after SSI benefits have been terminated. Persons receiving extended medical benefits under the Section 1619(b) program, however, must still have an annual income below the threshold level for SSI eligibility.

While these changes will be of great value to those SSI beneficiaries who are currently able (or who become able) to choose sustained gainful employment, the absence of effective program coordination between SSA and the Federal/State VR program (described in detail above) will continue to frustrate their overall effectiveness because comparatively few SSI beneficiaries are likely to reach a point at which they are confronted by a realistic choice of whether or not to enter the competitive labor market.

### **OTHER FACTORS**

NCD's 1986 Report identified several other important barriers encountered by persons with disabilities within the workforce, including the inability to obtain appropriate health insurance coverage, the reluctance of employers to make reasonable accommodations to the disabilities of prospective employees, the existence of physical and communication barriers in housing, transportation and worksites, and the absence of self-directed personal assistance services.

### **KEY ELEMENTS OF THE GENOA TRANSITION APPROACH**

The key elements of the Genoa Transition Approach which appear to respond most directly to the problems (discussed above) which have been identified as contributing to the general ineffectiveness of American transition programs can be grouped into three principal areas:

- (1) Innovative elementary and middle school education strategies, focusing on total classroom integration and the development of social and communication skills;

## ***From School to Working Life in Genoa***

(2) Flexible and individualized vocational training and innovative "trial work" strategies for supporting transition from school to gainful employment that stress the development of "work" skills rather than "job skills"; and

(3) An on-going employment support system that relies heavily on coworkers and families to create a positive psycho-social environment for transition and to provide direct employment support, with assistance from a multi-disciplinary network.

Each of these areas is discussed separately below.

### **Innovative Elementary and Middle School Education Strategies**

Students with moderate and severe disabilities in the United States are frequently isolated from their non-disabled peers for part or all of the elementary and middle school years in separate classrooms. In a significant number of instances, this isolation even extends to long-term placement in separate, "special" school facilities.

One consequence of this pattern of educational isolation has been the creation of a separate category of teachers, "special education" teachers, who have taken over responsibility from regular education teachers for the basic education of most children with moderate and severe disabilities. One unusual by-product of this approach has been the "narrowing" of those children within the public schools whom regular education teachers have been expected to teach. Ironically, in many American public school systems it is special education teachers who are capable of teaching all of the students (i.e., both handicapped and non-handicapped) and regular education teachers who are capable of teaching only a limited number. Similar teacher specialization in areas such as bilingual education and disadvantaged education, together with special education, have not infrequently left "regular" educators with the responsibility to serve a minority of pupils in a school system!

A second consequence of educational isolation has been the decreased likelihood that young people with moderate and severe disabilities in American special education programs will have the opportunity to develop social skills in direct

## ***From School to Working Life in Genoa***

contact with non-handicapped persons of the same age. Instructional approaches which rely on slides or films to teach social skills (like cardboard school buses to teach community skills) are rarely successful.

Italy has chosen a dramatically different approach to the education of children with moderate and severe disabilities during the pre-school and compulsory school (i.e., elementary and middle school) years. The hallmarks of this approach include:

- (1) The classroom integration (in natural proportion) of virtually all children from pre-school through the upper age limit (i.e., 15) for compulsory school attendance;
- (2) The reliance on the regular classroom teacher to provide basic instruction to all children of a given age, with general classroom support from special support teachers;
- (3) A strong curricular emphasis on the development of social and communication skills and competencies throughout the compulsory school period; and
- (4) The use of after-school teachers and special rehabilitation institutes to supplement the basic instruction program of children with moderate and severe disabilities.

The advantages of the Genoa approach to special education services are manifest, particularly for children with moderate and severe disabilities. The principle of normalization operates from the beginning of the public education program so that the social stigma caused by segregation never occurs. Not only do children with moderate and severe disabilities have continual exposure to social interaction with their non-disabled classmates, but the non-disabled classmates become familiar with and remain comfortable with the appearance and behavior of peers with moderate and severe disabilities. The development of social skills is obviously greatly accelerated not only by the curricular importance assigned to it, but also by the day-to-day demands of the integrated classroom environment. This two-way process contributes enormously to building the positive psycho-social environment that is an essential ingredient of the transition process.

Because regular classroom teachers provide the basic instruction to all children, teacher expectations appear to be significantly higher than would be the case in

### ***From School to Working Life in Genoa***

segregated settings. Teachers and support teachers often work with the same group of children (handicapped and non-handicapped in natural proportion) so that individualization become easier as teachers become more and more familiar with each child's learning and incentive-motivational styles. Support teachers are used to augment the overall resources available to the entire class, and, thus, regular classroom teachers can work individually or in small groups with disabled children on certain classroom activities.

The availability of after-school teachers and the on-going role of the Pediatric Support Team allows for the development of holistic approaches to each child and family. In addition, the Special Rehabilitation Institutes offer highly specialized developmental and corrective services for children with moderate and severe disabilities without interfering with either classroom integration or reducing the total time available for educational instruction.

### **Flexible Vocational Training and Innovative Trial Work Strategies**

The American approach to post-school vocational training for persons with moderate and severe disabilities has been disorganized, under-funded and inconsistent. Inadequate secondary school preparation and the lack of financial and programmatic skills frustrate the priority goal established by Congress within the Federal/State vocational rehabilitation system to serve first persons with severe disabilities. Indeed, the application of the basic eligibility criteria for vocational rehabilitation services often inherently disadvantages young persons with moderate and severe disabilities because they have been least well-served by the public schools.

In most instances, fragmented, unfocused planning procedures and the "selective" nature of vocational rehabilitation and developmental disabilities services prevent comprehensive individual transition planning and destroy program continuity during the crucial years of young adulthood. Coordination rarely exists between the "JTPA" programs and either the VR systems or local school districts. While supported employment services may be supported under several different Federal disability and "generic" programs, no coordination exists

## ***From School to Working Life in Genoa***

among these programs regarding the planning and provision of supported employment services. SSA's current VR referral program identifies and refers only a small percentage of young disabled persons, and few of those referred ever receive such services.

### **WORK EVALUATION AND TRAINING APPROACH**

The City of Genoa has developed a unique approach to vocational training for young persons with moderate and severe disabilities. This approach relies upon multi-disciplinary teams to provide individualized training focused primarily on the development of generic social and work skills through "work" evaluation rotations prior to the "trial work" period. A Special Transition Team conducts an extensive "Intake" process with each young person and his or her family in order to create a comprehensive picture of the current functioning of the new participant in a variety of social settings and community environments.

The Team then prepares an individualized, work evaluation program for each project participant in order to identify the specific work and social skill "training" needs of each participant in order to function successfully in regular, competitive employment. The participant is then assigned to a series of short-term work experience activities in which Team members evaluate the performance of the participant, identify specific skill needs and provide appropriate training.

Employers and coworkers are directly and substantially involved in the evaluation of work performance and in the development of needed "work" skills. The process is completed when the social and work skill preparation of the participant has been optimized.

### **INNOVATIVE TRIAL WORK APPROACHES**

In addition to the flexible and individualized approach to vocational training described above, the City of Genoa has developed an innovative "trial work" approach which uses a combination of financial incentives, peer communication and active union involvement to encourage employers to "take a risk" in hiring

## ***From School to Working Life in Genoa***

and maintaining first-time employees with moderate and severe disabilities.

The Genoa Project has directly involved the leadership of the Genoa community (particularly city officials and major employers and unions) to create a positive climate for project activities and to serve as members of a series of Field Action Groups which analyze the organization of work within a particular company and identify jobs and functions suitable for the project participants. In practice, there is usually no more than one project participant working at the same work site. Once a project participant has been matched with a job vacancy, the participant is assigned to the appropriate Group.

The responsible Field Action Group then prepares a contract for a one-year "trial work" period which spells out the conditions of the project and rules of behavior to be respected. The contract is neither extendable nor renewable, and its terms cannot be modified during the trial work period. Under the terms of the contract, the Genoa Project assumes primary responsibility for the trial work period, undertakes to provide professional advice and support and agrees to provide a stipend (paid through the employer).

Although regular employment support is available from the Field Action Group during the trial work period, the aim is to gradually withdraw as soon as possible. At the conclusion of the one-year trial work period, a joint decision is made among the parties to the trial work contract as to whether the participant will be permanently employed. If permanent employment is considered feasible, then the project participant is hired under the same terms and conditions that would apply to any other worker.

### **Ongoing Employment Support Systems**

If a participant is permanently employed by an employer following the completion of the trial work phase, the Field Action Group will provide employment support during the period of permanent employment on an intermittent basis whenever it is needed to assist the participant to sustain permanent employment. Employment support includes personal and job counseling, adjustments to job change or restructuring and co-worker support training. This support system

*From School to Working Life in Genoa*

relies heavily on coworkers and families to create a positive psycho-social environment for transition and to provide direct employment support, with assistance from a multi-disciplinary network.

Employers and coworkers are also directly and substantially involved in the ongoing support of disabled employees in order to build and maintain a climate of strong psycho-social support.

## GLOSSARY

### After-School Teacher

The After-School Teacher is a key member of the Pediatric Support Team which provides comprehensive health and social services to children with disabilities. The curriculum for after-school teaching is closely coordinated with the regular classroom curriculum through frequent consultations between the child's Support Teacher and After-School Teacher. The After-School Teacher frequently provides instructional support services to the same child over a period of several years. After-school instruction is typically provided for 2-3 hours per day, 2 or 3 days per week and the After-School Teacher often works with the child's mother to help develop parental reinforcement and support for the overall educational strategy.

### Central Coordination Team

The Central Coordination Team is the Genoa Project's administrative and management arm. Operating under the supervision of the Project Director, the 20 member team plans, supervises and monitors the overall project. The Central Coordination Team is also responsible for coordinating project activities with the programs and services provided by the various health and social services programs operated by the local health agencies throughout the city. Members of the team include social workers; other team members include psychologists, vocational teachers and work organization specialists.

### Children with disabilities

The number and percentage of children identified as "disabled" within the schools of Genoa is surprisingly low.

In 1988, less than 2.5% of the children enrolled in compulsory schools were so identified. Determinations as to which children are disabled (and thus which children are entitled to "special education services") are made by the local health agency and not by the school system. In practice, children identified as disabled by the local health agencies are divided into three groups: (1) mildly disability; (2) moderately disability; and (3) severely disability. In terms of the U.S. special education population, the children identified as "disabled" in Genoa do not include substantial percentages of children with "mild" speech impairments, children with mild "learning disabilities" and children with behavior problems (who are not clinically determined to be emotionally disturbed).

### Compulsory schools

In Italy, all children ages 6 to 15 must attend a public or private school program. The vast majority of parents in Genoa (over 95%) choose to enroll their children in the public Compulsory Schools. In Italy, compulsory public education is separated into two sequential comprehensive school programs -- "elementary" and "middle" schools. Elementary Schools enroll children between the ages of 6 and 10 years; Middle Schools enroll children between the ages of 11 and 15 years. Italian "High Schools", which enroll children ages 15 to 19, are not compulsory.

### Day Care Centers

Day Care Centers provide an eight hour program daily for from 6 to 7 young adults with severe disabilities. The young persons enrolled in these, who are regarded as "incapable of working", are

provided instruction in self-help skills, recreation and regular social contact with both disabled and non-disabled peers.

#### **Elementary schools**

Elementary Schools are public compulsory schools which enroll children between the ages of 6 and 10 years.

#### **Employment Quota**

By law, employers in Italy are expected to have a workforce, 15% of which is comprised of persons from certain priority groups (e.g., disabled persons, widowers, orphans).

#### **Employment support**

Employment support is intermittent (i.e., not provided on a regular basis) support provided to young adults with disabilities during the first 3-5 years of employment in order to sustain permanent employment. Employment support includes personal and job counseling, adjustments to job change or restructuring and co-worker support training.

#### **Field Action Group**

Within the Genoa Project, Field Action Groups manage the day-to-day support which is provided to assist mentally disabled persons who are working in public or private employment settings as a result of project activities. The membership of each Field Action Group includes two members of the Central Coordination Team, a representative from an employer association and a representative of the workers appointed through unions. The primary responsibilities of each Field Action Group relate to "transition" problems which may arise for a project participant at the work place.

### **Genoa Project**

The Genoa Project is a multi-faceted program serving approximately 250 mentally disabled young persons in Genoa between the ages of 16 and 24, with "moderate" and severe mental retardation and with chronic psychological disabilities (e.g., autism, schizophrenia). The central goal of the Genoa Project is to prepare, place and sustain young persons with moderate and severe mental disabilities in integrated and compensated employment. The project is administratively "attached" to one of the local health agencies in Genoa.

#### **Guiding Committee**

The Guiding Committee functions as an advisory board to the Genoa Project charged with creating and maintaining a climate of support for the project within the overall community. The Guiding Committee is composed of representatives of public agencies, trade unions, chamber of commerce and employer associations, delegates from the local satellite offices of the Italian Ministry of Employment, and representatives from organizations of parents and disabled adults.

#### **Handicapped children**

[See "Children with disabilities"]

#### **Integrated Vocational Training**

Integrated vocational training in Genoa is provided to both disabled and non-disabled students in publicly operated Vocational and Technical Schools. These schools offer two to three years of specialized training in a wide range of commercial and industrial areas.

## Job Analysis

Job analysis includes a careful task analysis of existing job structures. Tasks are split into single operations and an analysis is made of the information and skills needed to perform each of them.

## Local health agency

The Regional Administration of the Italian Ministry of Health and Social Services is generally responsible for employment and rehabilitation provisions for disabled people and all health and social services delivered by the local health authorities within Genoa. For purposes of program operation, the City of Genoa is divided geographically into local health districts, each containing a population of approximately 80,000 persons. Within the average Genoa district, approximately 11,000 persons (or 14% of the total population) are children.

## MCH Unit

All non-residential health and social services for children and young persons in Genoa under the age of 18 are under the supervision of the Maternal and Child Health Service ("MCH unit") of the local health agency serving the catchment area in which the child resides.

## Middle School

Middle schools are public compulsory schools which enroll children between the ages of 11 and 15 years.

## Multi-Agency Staffing Group

Within the public pre-school program in Genoa, Multi-Agency Staffing Groups are committees which meet at least once each year to discuss the unique characteristics of each pre-school child with a disability. Members of

this multi-agency staffing group are: (1) The child's "Support Teacher"; (2) The child's current pre-school teacher; (3) The child's past pre-school teacher; (4) The pre-school principal; (5) the Coordinator of Health Services; (6) appropriate therapists (e.g., speech therapy, physical therapy); (7) a psychiatrist; and (8) the child's "After-School Teacher." The primary function of the multi-agency staffing group is the development of an individualized plan to support successful participation by the child in the full range of pre-school activities.

## Pediatric Support Team

Within each MCH unit a Pediatric Support Team coordinates the provision of health and social services to approximately 250 children and young persons under the age of 18 who have been identified as disabled. Each Pediatric Support Team consists of a Supervisor (a psychiatrist who also serves as Coordinator of Services for the compulsory schools located within the catchment area), three educational specialists, two clinical psychologists and two speech therapists. The After-School Teacher also functions as a de facto member of the Team. The Pediatric Support Team makes determinations as to which children are disabled and provides "related" services to pre-school and school age children with disabilities. Team members also participate both in the development and the monthly or bi-monthly reviews of individual educational plans for each disabled child and provide parent/teacher counseling and operate support groups for mothers of children with disabilities.

## Pre-School Program

In Genoa, public pre-school educational programs are operated on a voluntary enrollment basis for all children ages 3-6. Public pre-school education is provided 8 hours per day,

five days per week in a system of separate public pre-schools. Approximately 90% of all children ages 3-6 are enrolled in public pre-school programs. The public pre-school program stresses social development, creativity and cooperative activities rather than academic development. Average pre-school class size is approximately 12 and open classroom structures are used to promote social interaction among all pre-school children in the same age groups. Between 3 and 5% of the children enrolled in public pre-school programs are identified as disabled. Within the context of American pre-school programs, these children would generally be classified as "developmentally disabled."

#### **Private Sector Strategy**

The goal of the Private Sector Strategy is integrated, compensated employment within the competitive labor market. The strategy consists of three basic components: (1) job identification; (2) trial work; and (3) ongoing employment support. Each of the Special Transition Teams is responsible for identifying specific private sector jobs which can be filled by project participants during the Trial Work Phase of the project. The purpose of the one-year trial work period is to provide the young person with disabilities and his family, on the one hand, and the employer and other workers on the other hand, with the experience of working together in a real employment setting without an employment which is final and irreversible. For the trial work period, a written contract spells out the conditions of the project and rules of behavior to be respected. The contract is neither extendable nor renewable and its terms cannot be modified during the trial work period. At the conclusion of the one-year trial work period, a joint decision is made among the parties to the trial work contract as to whether the participant will be permanently

employed.

#### **Public Sector Strategy**

The goal of the Public Sector Strategy is integrated, compensated employment within non-competitive, public employment for those project participants for whom it is determined by the Special Transition Team that private sector competitive employment is infeasible in the short-term. The Public Sector Strategy follows the basic job identification process outlined above, except that the responsible Field Action Group identifies suitable job vacancies (and potential job restructuring) within public (regional and local) agencies within Genoa. Instead of a trial work period, a contract is prepared which is of indefinite duration and spells out the conditions of the project and rules of behavior to be respected. Unlike the contract used in the Private Sector Strategy, the terms of the public sector contract may be modified during the indefinite employment period as conditions warrant. Under the terms of the contract, the Genoa Project and the other public agency involved share responsibility for the employment of the project participant.

#### **Regional Transition Team**

The Regional Transition Teams, composed of regular and support teachers from various school sites within a particular region of the city, provide individualized transition counseling to all students graduating from public middle school programs. Team members meet with students and their families to discuss both academic and vocational interests and aptitudes and to identify specific placement opportunities (including further academic training, direct employment approaches, a range of vocational training options, and sheltered workshops) appropriate for the student.

## **Rehabilitation Center**

Rehabilitation Centers provide young persons with moderate and severe disabilities the work skills necessary for participation in a Sheltered Workshop program. The Rehabilitation Center program is publicly funded but operated by parent associations.

### **Related Services**

"Related services", as that term is used in American school systems, are provided in Genoa either by members of the local health agency or by staff of special "institutes" which are operated by parent associations. These related services include speech therapy, occupational and physical therapy, psychological services, recreation, social work services, school health services, parent training and transportation.

### **Sheltered Workshops**

Sheltered Workshops in Genoa provide sheltered employment for approximately 150 young adults with disabilities, most of whom have entered the workshops upon the completion of middle school. Each Sheltered Workshop provides individualized vocational training for newly enrolled employees. The length of the vocational training provided by the workshop ranges from two weeks to several months, depending on the entry level work and job skills of the individual. The workshops are publicly funded but operated by parent associations.

### **Special Education Services**

Special education services for all disability children in Genoa are provided by regular classroom teachers, Support Teachers (who are employed by and work within the compulsory schools) and by special After-School Teachers (who are employed by the local health agency).

## **Special Rehabilitation Institutes**

Special Rehabilitation Institutes provide comprehensive "related services" to children with disabilities in each of the following categories: (a) children with moderate or severe mental retardation (including virtually all children with Down Syndrome); (b) children who are blind and deaf-blind; and (c) children who are non-ambulatory. The institutes are publicly funded but operated by parent associations.

### **Special Training Workshops**

Special Training Workshops provide a special "partially sheltered" vocational training program upon completion of middle school for students with moderate to severe disabilities. The primary target populations for the Special Training Workshops are young people between the ages of 15 and 17 with severe social and/or behavioral problems (including both disabled and non-disabled persons). For these students, the twin goals of the workshop are the development of social and work skills rather than the acquisition of specific job skills. This program is supported in part by the Ministry of Health and Social Services and by a special grant from the European Economic Community (the Common Market).

### **Special Transition Team**

Special Transition Teams operate within the Genoa Project and have the responsibility for the pre-employment training of project participants. The primary role of the Special Transition Team is to teach basic work skills to project participants prior to job-site integration. The enhancement of social and communication skills is also an important team goal. Each Transition Team is composed of 3 or 4 members and

includes a psychologist, one or two professional training instructors (usually social workers) and an employment specialist, and is assigned an "active" caseload of approximately 15 young persons who are participating in the Assessment and Training Phases of the overall project.

#### **Support Teacher**

Support Teachers provide assistance to the regular classroom teachers both with respect to the disabled children enrolled and the total curricular effort. Support Teachers are former regular teachers who have taken some specialized training in psychology. Most of the assistance provided by Support Teachers in Genoa occurs physically within the regular classroom and includes the use of team-teaching and small group instruction strategies as well as individual instruction.

#### **Work Evaluation**

The work evaluation process is part of the Genoa Project. It involves the assignment of the project participants to a series of short-term work experience activities. In each of these activities, Special Transition Team members initially assess the social and work skill demands, evaluate the performance (including productivity, co-worker and supervisor interaction and job satisfaction) of the project participant (in consultation with the "temporary" employer and co-workers) and identify specific skill needs. Appropriate training is then provided by team members and another short-term work experience rotation is planned.

#### **Work Experience Program**

The Work Experience Program is an innovative approach developed by the local Ministry of Labor in Genoa which provides summer work opportunities for students with disabilities who have

graduated from the public compulsory school system. The Work Experience Program operates for an 8 to 12 week period. In most instances, the young persons with disabilities receive a direct stipend from the Ministry.  
**Work Skills**

Work skills include a knowledge of the rules of jobsite and the language of the work environment, and the capability to conform to the socialization practices expected within the work environment between employees and supervisors, employees and co-workers, and employees and customers or clients.

#### **Young person with disabilities**

[See "Children with disabilities"]

## INDEX

### - A -

Academic Path 25

Adult status 35, 36, 48

After-School Teacher 9, 16, 19,  
20, 22, 65, 66

American transition preparation  
"special" school facilities  
64  
failure to develop social  
skills 64  
separate classrooms 64

American transition programs  
absence of comprehensive  
individual  
transition planning  
58  
absence of parent and  
family involvement  
59  
absence of self-directed  
personal assistance  
services 63  
absence of systematic  
transition process  
55  
demonstrated potential for  
success 55  
dispersion of management  
responsibility 57  
effectiveness of SSA/VR  
referral system 62  
gaps, inconsistencies and  
inequities 56  
inability to obtain  
appropriate health  
insurance coverage  
63  
inaccessibility of the  
service system to  
clients 57  
inadequate secondary  
school preparation  
59

Independent living  
55

Ineffectiveness 54

lack of involvement  
of clients 57

loosely aggregated  
programs 57

physical and commun-  
ication barriers in  
housing 63

reliance on fragmented,  
unfocused planning  
procedures 58

reluctance of employers to  
make reasonable  
accommodation 63

role of State Medicaid  
agencies 58

special education  
graduates 56

SSA/VR referral system 61  
SSDI 55, 61

SSI 55, 61

SSI work incentives 63

supported employment 55

unavailability of effective  
job training 59

Apprenticeship 24, 28

### - B -

Behavior problems 19, 28

Blindness 10, 21, 23

### - C -

Case conferences 23

Caseload 21

Central Coordination Team 38,  
40, 41, 46, 49

Classroom integration 19, 63

Classroom settings 15, 19

Co-workers 12, 32, 36, 38, 44, 47,  
49, 50, 51, 67, 68

Communication skills 4, 63, 65

Community participation 1, 11, 12

Community resources 4

Competitive employment 28

Compulsory schools 11, 17  
disabled children 18  
graduation 25  
school enrollment 17

- D -

Day Care Centers 29, 30

Deaf-blind 10, 23

Deafness 21

Decentralization 11

Degree of social acceptance 22

Developmentally Disabled Assistance  
and Bill of Rights Act 58

Disabilities 12

Disability Advisory Council  
1988 report 55, 62  
effectiveness of vocational  
rehabilitation 55

Down Syndrome 10, 23

- E -

Economic integration 11

Educational specialists 9

Elementary and secondary  
education 11

Elementary Schools 17

Emotionally disturbed 19

Employer associations 31, 38, 39,  
46

Employers 1, 4, 26, 31, 48

Employment Quota Program 26, 31

Employment settings 27

Employment support 50, 68

- F -

Families 1, 12, 32, 35, 48, 49, 53  
empowerment 57  
accountability to 57

Federal policies and programs  
current problems 54  
fractionalization 56  
recommended changes 56

Field Action Groups 37, 38, 40,  
42, 43, 48, 50, 51, 68

- G -

Gainful employment 1, 11

Genoa 12  
closing of residential  
institutions 2  
historical problems 1  
integration of persons with  
moderate and severe  
disabilities 2  
past history of residential  
programs 2  
political stability 12  
school segregation 3

Genoa Project 13, 24, 25, 30, 32,  
33, 39, 41, 43, 61  
admission criteria  
43  
co-workers 37, 69  
community leadership 68  
cost effectiveness 52  
employment support 38,  
45, 68, 64, 69

**Genoa Project (continued)**

family adoption program 53  
individualized vocational  
training 64  
innovative "trial work"  
strategies 64  
intake assessment 33, 43  
integration 35  
job analysis 4  
mediating role with families  
38, 53  
outcomes 52  
permanent employment 34  
Private Sector Strategy 33,  
43, referral to 45  
Public Sector Strategy 33,  
43, 45, 50, 51  
psycho-social  
environment  
3, 64, 69  
psycho-social support 4  
referral to sheltered  
workshop 33, 45  
salary and benefits 34  
success 34  
team assignment 44  
training of staff 51  
trial work contract 34, 47,  
65  
trial work period 47  
work evaluation 33, 43,  
44, 67  
workplace assessment 46

**Genoa Transition Approach** 63  
development 4

**Guiding Committee** 38, 39, 46, 49

**- H -**

**Handicapped and Geriatric  
Services** 7, 13

**Handicapped students** 21

**Health education** 9

**Health services** 7

**High Schools** 17, 24, 25

**Integration** 26

**Home instruction** 22

**- I -**

**In-service training** 51

**Independent living skills** 27

**Individual educational plans** 16,  
19

**Bi-monthly review** 10, 22

**Individual instruction** 20

**Integrated employment** 11

**Integrated vocational training** 26

**Integration** 11, 18, 36, 48  
regular classrooms 4

**Interagency coordination** 3

**Italy**

closing of residential  
institutions 2  
integration law 26  
social policy 7

**- J -**

**Job counseling** 50, 68

**Job identification** 45, 46, 50

**Job restructuring** 46, 50

**Job skills** 28, 32, 35, 37

**Job structures** 46

**Job Training and Partnership Act** 59

**- L -**

**Learning and behavior handicaps**  
21

**Learning disabilities** 19

**Learning environments** 21

Local health agencies 16, 18, 20,  
22, 28, 40, 41

Local health districts 7

- M -

Maternal/Child Health Service 7  
client population 8

Mental disabilities 31

Mental retardation 10, 23, 29, 32,  
38

Middle Schools 17, 23, 25

Ministry of Education 6

Ministry of Employment 39

Ministry of Health and Social  
Services 7, 28, 30

Ministry of Labor 27, 31, 46

Moderate & severe disabilities 30

Multi-agency staff meeting 16

Multi-agency staffing 10, 15

Multi-disciplinary teams 32

Multiple disabilities 29

- N -

National Council on Disabilities  
1986 report 55

Natural proportion 19, 28, 46

Non-ambulatory 10

Non-residential health care 8

Normalization 11, 65

- O -

Occupational therapy 10, 23

OECD Transition Study 1, 6

On-the-job training 27, 51

Organizational participation 12

- P -

P.L. 94-142 58

Parent associations 23

Parent counseling 23

Parent groups 10, 31, 39

Parent support groups 10

Parent training 10, 23

Parent/teacher counseling 10

Parental approval 17

Pediatric day care 10

Pediatric Support Team 8, 9, 22,  
23, 66  
case conferences 23

Peers 12, 22, 30, 38

Permanent employment 49, 50, 68

Physical therapy 10, 23

Pre-school programs 12, 14

Preventive health care 8

Principal 10, 22

Psychiatrists 9

Psycho-social development 36

Psycho-social preparation 2

Psychological disabilities 32

Psychological services 10, 23

Psychologists 9, 40

- R -

Recreation 10, 23

Regional transition team 23

Regular classroom 16, 19

Regular classroom teacher 20, 65

Rehabilitation Act 61

Rehabilitation centers 29, 30

Related services 10, 23

Retention 16

- S -

School health services 9, 10, 23

Self-advocacy 4, 59

Severe disabilities 19, 28, 30

Sheltered path 25, 29

Sheltered work 11, 36

Sheltered workshops 24, 29, 32,  
52

Small group instruction 20, 28

Social development 15

Social integration 11, 34

Social interaction 15

Social networks 47

Social problems 28

Social roles 35

Social Security Act 60

Social services 7-9

Social skills 2, 4, 20, 28, 30, 34,  
35, 37, 45, 49, 63,  
65, 67

Social work services 10, 23

Social workers 40, 42

Socialization 22, 44

Special education services 16, 18

Special rehabilitation institutes  
8, 10, 23, 65, 66

Special training workshops 26

Special Transition Teams 33, 37,  
38, 41, 42, 45, 50,  
51, 67

Speech impairments 19

Speech therapists 9

Speech therapy 10, 23

Stipends 27, 28, 45, 48, 52, 68

Student-apprentice 48

Summer programs 27

Support Teachers 10, 15, 16, 20,  
22, 24, 66

Supported employment 59

- T -

Teacher/pupil ratio 15, 19

Team-teaching 20

Transportation 10, 23, 49

Trial work 4, 33, 68

- U -

Unemployment 12

# FROM SCHOOL TO WORKING LIFE IN DENMARK

*The Transition of Young Persons With Disabilities*

by

Martin H. Gerry

1989

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# TABLE OF CONTENTS

CHAPTER I - INTRODUCTION .....	1
BACKGROUND .....	1
Restricted Educational Opportunities .....	1
Ineffective Service Coordination .....	2
Needed Improvements .....	3
ORGANIZATION OF PROFILE .....	4
DEVELOPMENT OF PROFILE .....	5
CHAPTER II - OVERVIEW OF THE DANISH SYSTEM .....	6
THE DANISH SOCIAL SERVICE SYSTEM .....	6
The 1980 Reforms .....	6
The Basic Social Obligation .....	7
The Social Worker .....	7
DANISH DISABILITY POLICY .....	8
Normalization .....	8
Integration .....	9
Decentralization .....	9
ORGANIZATION AND FINANCE .....	10
Levels of Government .....	10
Governance of Folkeskoles .....	11
Finance of Upper Secondary Components .....	12
System Overview .....	13
CHAPTER III - THE BASIC PROGRAM .....	14
THE DANISH FOLKESKOLE .....	15
SPECIAL EDUCATION ELIGIBILITY CRITERIA .....	16
The Special Education Population .....	17
EDUCATIONAL ISOLATION .....	18

CHAPTER IV - THE KURATOR .....	20
COUNSELING, CAREER GUIDANCE AND TRANSITION SUPPORT ROLES .....	21
THE SCHOOL PSYCHOLOGICAL TEAM .....	21
COORDINATION WITH INSTRUCTIONAL STAFF .....	23
The Class Teacher .....	23
"THE CAREER GUIDANCE TEAM" .....	23
Guidance Teachers .....	24
The Kurator's Role .....	24
Youth Advisor .....	26
LOCAL YOUTH TEAMS .....	27
THE CASELOAD .....	27
COORDINATION WITH MUNICIPAL SOCIAL SERVICE PROGRAM .....	29
ACTIVITIES WITHIN THE FOLKESKOLE .....	29
Guidance Activities .....	29
Teaching Activities .....	30
Vocational Support Activities .....	30
ACTIVITIES OUTSIDE THE FOLKESKOLE .....	31
On-Site Visits .....	31
Family Liaison .....	32
QUALIFICATIONS, TRAINING AND EXPERIENCE .....	32
Qualifications and Training .....	33
Skills and Experience .....	34
CHAPTER V - UPPER SECONDARY SCHOOLS .....	35
THE ACADEMIC SYSTEM .....	36
THE VOCATIONAL PATH .....	37
The Folkeskole Component .....	37
Career Guidance and Pre-Vocational Courses .....	38
Work Experience Programs .....	39
Work Placement Programs .....	40
Youth Education Programs .....	41
Upper Secondary Vocational Options .....	43

Continuation Schools .....	44
Production Schools .....	44
Vocational, Commercial and Technical Schools .....	46
Apprenticeship Training .....	47
Special Workers Courses .....	48
Special Employment Programs .....	49
Municipal Youth Employment Guarantee .....	49
County Employment Programs .....	49
<b>THE SHELTERED PATH .....</b>	<b>51</b>
County Special Schools .....	51
Special Boarding Schools .....	52
Special "Adult" Schools .....	53
Sheltered Workshops .....	54
High Production Workshops .....	54
Low Production Workshops .....	56
Rehabilitation Centers .....	57
<b>THE ADULT PATH .....</b>	<b>57</b>
Folk High Schools and Evening Schools .....	58
Special High Schools .....	58
Labor Market Courses and Special Remedial Programs .....	58
<b>CHAPTER VI - OUTCOMES .....</b>	<b>60</b>
FOLKESKOLE OUTCOMES .....	60
EMPLOYMENT OUTCOMES .....	61
<b>CHAPTER VII - TRANSITION IN AMERICA: PROGRAM IMPLICATIONS .....</b>	<b>65</b>
"TRANSITION" IN AMERICA .....	65
The Current Effectiveness of Transition .....	66
Reasons for the Ineffectiveness of Transition Efforts .....	67
KEY ELEMENTS OF THE DANISH TRANSITION APPROACH .....	70
Innovative Secondary Education Strategies .....	70
Flexible Adult Education Systems .....	72
Ongoing Case Advocacy and Service Coordination .....	72
<b>CONCLUSION .....</b>	<b>74</b>

GLOSSARY .....	75
INDEX .....	83

## ***CHAPTER I – INTRODUCTION***

Within Denmark an innovative system has been developed to maximize the potential of young adults to successfully transition from school to adult and working life. This system involves the use of a "case advocate" or "Kurator" who provides ongoing assistance to young persons with disabilities and their families from age 13 on. Buttressed by a broad array of secondary and post-secondary education and training options, the Kurator fashions individualized, multi-year programs to support transition from school to gainful employment and community life.

### **BACKGROUND**

Prior to the initiation of the Danish Transition Approach, young persons with disabilities completing Danish Folkeskole programs were faced with both immediate and long-term obstacles to successful transition from school to gainful employment and independent community life, including segregated educational systems, limited upper secondary vocational options and a total lack of coordination among the various agencies responsible for providing educational, social and employment support.

#### **Restricted Educational Opportunities**

Historically, a comparatively small number of young persons with disabilities in Denmark had pursued upper secondary vocational programs and a large number of such students (particularly those with moderate or severe disabilities) received their basic education in segregated Special Schools operated by the county offices of the Ministry of Social Affairs. Successful "transition" from Special Schools or Fokeskoles to upper secondary programs was frustrated by a series of specific problems, including the absence of sufficient information concerning upper

secondary and other educational opportunities and of study routes which could be modified or adapted according to the situation of the individual student. In addition, admission requirements for a comparatively narrow range of opportunities within the upper secondary system severely limited access to desired educational or vocational programs. Most young people with disabilities who completed vocational training had to endure long waits between the end of their schooling and their first jobs. This lengthy waiting period has had a devastating effect on their self-confidence and sense of self-worth.

### **Ineffective Service Coordination**

Prior to the implementation of the Danish Transition Approach, the responsibility for interagency service coordination was left entirely to the young person with disabilities and his or her family. Most of the problems encountered by young persons with disabilities in linking competitive employment and independent living may be attributed to the lack of effective service coordination among the responsible public agencies. Even when the supply of job opportunities increased, employment prospects for young persons with disabilities did not keep pace. The important missing ingredient was a mechanism for ensuring intensive cooperation among schools and rehabilitation staff, students and their families to plan and ensure successful transition.

In practice, the disabled individual and his or her family were required to identify and then communicate with several agencies (e.g., the county social service and employment agencies; municipal employment program; public and private vocational training programs). This process often involved the need to separately contact as many as 10 to 15 different people because program responsibilities within the various public agencies are often divided between several different units.

**Needed Improvements**

In light of the problems identified above, Danish policy makers arrived at seven basic conclusions regarding the design of an improved transition approach for young persons with disabilities:

(1) Towards the end of the Folkeskole period, careful coordination needs to occur among those members of the Folkeskole staff most familiar with and/or expert in career planning for students with disabilities.

(2) In order to "transition" from school to gainful employment, young persons with disabilities need expanded opportunity to acquire work experience in a particular occupational field before making decisions regarding employment and/or upper secondary education, necessitating practical forms of collaboration between the Folkeskole and the various agencies responsible for the provision of upper secondary vocational education and employment related services.

(3) A wide range of upper secondary vocational program options should be created to permit competition and improve the likelihood of a "good fit" between the needs of a young person with disabilities and the available vocational training opportunities.

(4) During the final years of upper secondary vocational programs, young persons with disabilities need special support and assistance in their efforts to find and sustain gainful employment.

(5) Young persons with disabilities and their families should be involved in identifying the assistance that they need and in deciding how and by whom that assistance should be provided.

(6) Effective cooperation among various public authorities (particularly among the education agencies, county social service agencies and local employment agencies) is essential if young persons with disabilities are to fully benefit from the various resources which exist within the community.

(7) A "case advocate" within the Folkeskole system is needed to carry out the various coordination, planning and follow-up activities which have been identified.

**ORGANIZATION OF PROFILE**

The purpose of this descriptive profile is to provide American education and rehabilitation agencies with a basic understanding of the Danish approach to the transition of disabled young persons. Its goal is to provide information sufficient to allow those agencies to replicate or adapt one or more important features of that approach. It must be stressed that the descriptions provided below are a composite of the current practices in Denmark. Because of the significant variations in secondary school structures and in the specific responsibilities of Kurators among the different counties and municipalities of the country, no single uniform system exists. In many ways, the variations among jurisdictions reflect the desire to tailor the system to their particular demographic and economic characteristics.

In organizing this profile it was necessary to present information both about the Kurator system and the overall secondary and post-secondary system in which it operates. In doing this, it became difficult to decide which information to present first. A decision was made to provide first a general introduction to the overall system which exists within Denmark to provide social services and employment to persons with disabilities (Chapter II). Following this introduction, Chapter III outlines both the basic education program provided for all Danish children and of the provision of special education services in Denmark. This general overview is followed by a detailed discussion of the Kurator system (Chapter IV) and by a description of the various secondary and post-secondary education, training and work options available to the Kurator (Chapter V). Chapter VI presents a summary of available information regarding the employment outcomes of the Danish transition approach for both disabled and non-disabled participants and the profile concludes with a discussion of the current ineffectiveness of American transition programs and the implications of the Danish experience for solving problems in the American transition approach which contribute to its current ineffectiveness (Chapter VII).

**DEVELOPMENT OF PROFILE**

This descriptive profile is based on information provided by the Danish Ministry of Education to OECD over a five year period and information collected through two on-site visits to Denmark during August and November, 1988. The profile was developed by Mr. Martin Gerry of the Fund For Equal Access to Society ("FEATS") with extensive assistance from Ms. Gia Kjellen, OECD, Mr. Jørgen Hansen of the Danish Ministry of Education, and Kurator Jens Bartholin, Odense Commune. FEATS would also like to express its appreciation to Mr. David Thomas and Ms. Kathleen Kelley of OECD for their assistance throughout the preparation of the profile and to Professor Ruth Luckasson (University of New Mexico) and Dr. Beatrice Gerry (Fairfax County Public Schools, Virginia) for their assistance during the Danish field data collection activities.

FEATS would also like to thank Ms. Kjellen, Mr. Hansen, Mr. Bartholin, Dr. Luckasson and Mr. John Fish of OECD for their extensive assistance in the drafting and revision of the profile.

## **CHAPTER II – OVERVIEW OF THE DANISH SYSTEM**

Social Policy in Denmark establishes a basic obligation on the part of government (national, regional and local) to provide whatever care and support is needed by families and individuals unable to successfully participate in the mainstream social and economic systems of the country.

### **THE DANISH SOCIAL SERVICE SYSTEM**

The Danish Social Service program provides an excellent constellation of social and economic support services for children and adults with disabilities. Until 1980, the Danish Ministry of Social Affairs operated a separate, self-contained and comprehensive program for persons with disabilities which included educational, economic and social benefits. In many instances, the Ministry operated separate school programs for children with disabilities at a county level. The "Green Schools" (discussed above) were the mainstay of this system.

### **The 1980 Reforms**

The reforms completed by the Danish Parliament in 1980 led to the transfer of all responsibility for the education of children with disabilities from the Ministry of Social Affairs to municipal and, in some instances, county authorities. A second important element of the same reform was to change the organizational approach to providing the economic and social support services which continue to be the responsibility of the Ministry of Social Affairs. Specifically, embracing the principle of "normalization" discussed earlier, the reforms abolished the separate organizational structure ("Handicapped Services") and financial systems which had been created for persons with disabilities. As a result, children and adults in

Denmark currently receive services and benefits under the program through the same structures used to provide benefits and services to non-handicapped persons.

The final element in the overall reform of the Social Service Program was the transfer of most operational responsibility from the national level (Ministry of Social Affairs) to the regional and local levels.

### **The Basic Social Obligation**

Danish law provides that the responsible public authority (usually the municipal or county government) must provide social, medical and financial assistance to each resident of Denmark:

"... who for himself or for members of his family is in need of advice, financial or practical assistance, support for development or restoration of working capacity, or for care, special treatment or educational support." (Chapter 1, Article 1 of the Social Assistance Act of 1974).

The types of services which are routinely provided to persons with disabilities, either free or at a greatly reduced rate, include comprehensive medical and health care (including community-based care), psychiatric and psychological services, counseling, rehabilitation services, certain types of upper secondary education and training (described in detail in Chapter IV), employment support services (including attendant care) and transportation. In addition to these generic services, special employment subsidies (as described in Chapter IV) are available for persons with disabilities.

Pensions (payments in lieu of work) are paid to individuals whose work capacity is less than 50% of the average work capacity for a person of that age as a result of any physical or mental disability. The amount of the pension is calculated by a variety of factors, including health status, family size and support responsibilities, age, education and local job availability. In addition to the pension, special financial assistance is available under the Social Assistance Act

for children and young adults with disabilities who wish to enroll in upper secondary education and training programs which are not directly publicly financed.

### **The Social Worker**

Every person residing in Denmark is assigned to the caseload of a social worker employed by the municipality in which the person resides. For young persons with disabilities, the responsible social worker carries out several important functions including:

- (1) Planning the support services to be provided to young persons pursuing further training or education after Folkeskole completion;
- (2) Provision of housing support and appropriate leisure time activities;
- (3) Coordination between Sheltered Workshops and Employment Agencies; and
- (4) Administration of special training and employment subsidies.

### **DANISH DISABILITY POLICY**

Danish social policy regarding persons with disabilities is centered around three main principles: (1) normalization; (2) integration; and (3) decentralization.

#### **Normalization**

The principle of "normalization" dictates that persons with disabilities be on an equal footing with all other Danish citizens with respect to law, government agencies and other political, social and economic institutions. Normalization does not require that persons with disabilities change or adapt to become more "normal". This principle has led to the inclusion of persons with disabilities under all of the basic educational, social and health laws and programs and the

elimination of "separate" laws pertaining only to persons with disabilities.

In practice, the education of children with disabilities is addressed under the basic laws governing pre-school and elementary/secondary education. There is, in fact, no national legislation which directly addresses "special education". In Denmark, normalization is seen as a challenge to society, rather than a demand that the individual should be "adapted" to make him normal.

### **Integration**

The principle of integration within the Danish system has led to the inclusion of the vast majority of Danish children within the basic Folkeskole structure and within the regular classroom setting. In this sense, integration is seen in part as a necessary adjunct of normalization. Mr. N.E. Bank-Mikkelsen, the former Director of the Department for Care and Rehabilitation of the Handicapped, National Board of Social Welfare, who differentiates "normalization" from "integration" has written that:

"Normalization has often been confused with the problem of integration and segregation. It should be stressed that, while normalization is the objective, integration and segregation are simply working methods. They are the means which can be selected according to the evaluation in each situation of what would be the most suitable or efficient way to reach the goal." Bank-Mikkelsen, N.E., "Denmark", in Changing Patterns in Residential Services for the Mentally Retarded, Eds. Kugel & Shearer, PCMR (1976).

### **Decentralization**

Finally, the principle of decentralization has led increasingly to the devolution of programmatic responsibility for education and training programs first from the national (ministerial) level to the regional (county) level and then from the county level to the local (municipal) level. In a society with a strong national disability policy, decentralization of programmatic responsibility involves certain inherent uncertainties. For example, will local decisionmakers consistently assign the same

## *From School to Working Life in Denmark*

priorities to the interests of disabled persons when confronted with a range of competing priorities?

Experience in Denmark over the last decade has reflected a strong local commitment to the provision of appropriate educational, employment and social support services at the local level. Normalization appears to have become a public attitude and not just a social or political philosophy.

### **ORGANIZATION AND FINANCE**

Elementary and secondary education in the Kingdom of Denmark is under the supervision of the Danish Ministry of Education. The responsibility for the operation of education and training programs for persons with disabilities is, however, divided among three levels of government: national, county and municipal, and the private sector.

#### *Levels of Government*

At the national level, the Danish Ministries of Labor and Social Affairs directly operate certain education and training programs for young persons with disabilities (see Figure 1). In contrast, the Ministry of Education does not operate any education and training programs, but supervises and coordinates the activities of municipalities. Several important education and training programs are administered at the county level, including the principal components of the Sheltered Path (e.g., County Special Schools, Rehabilitation Centers and Sheltered Workshops). At the municipal level, responsibility is vested for the operation of the basic Folkeskole program, Vocational Schools, the Youth Employment Guarantee and most of the components of the Adult Path (see Figure 2).

Governance of  
Folkeskoles

Each Danish Folkeskole is governed by an elected school board which is composed of 5-7 parents (elected by parents of students attending the school), two pupils, two teachers, the principal and a city council representative. The school board acts as the supervising authority for the school and establishes school rules. Teachers in the Folkeskole, through a Teachers' Council,

develop the overall curriculum and select instructional materials, subject to the final approval of the school board.

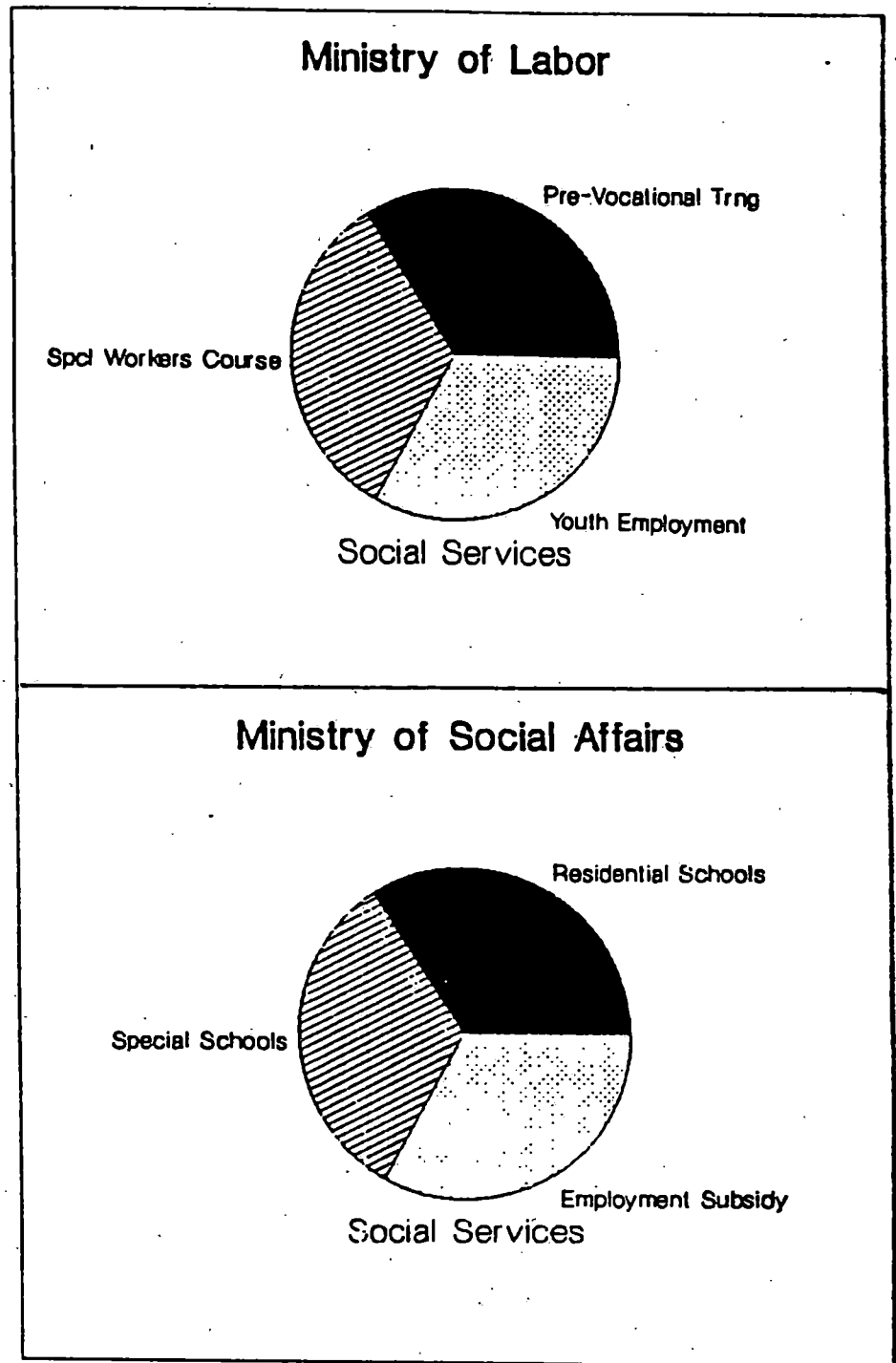


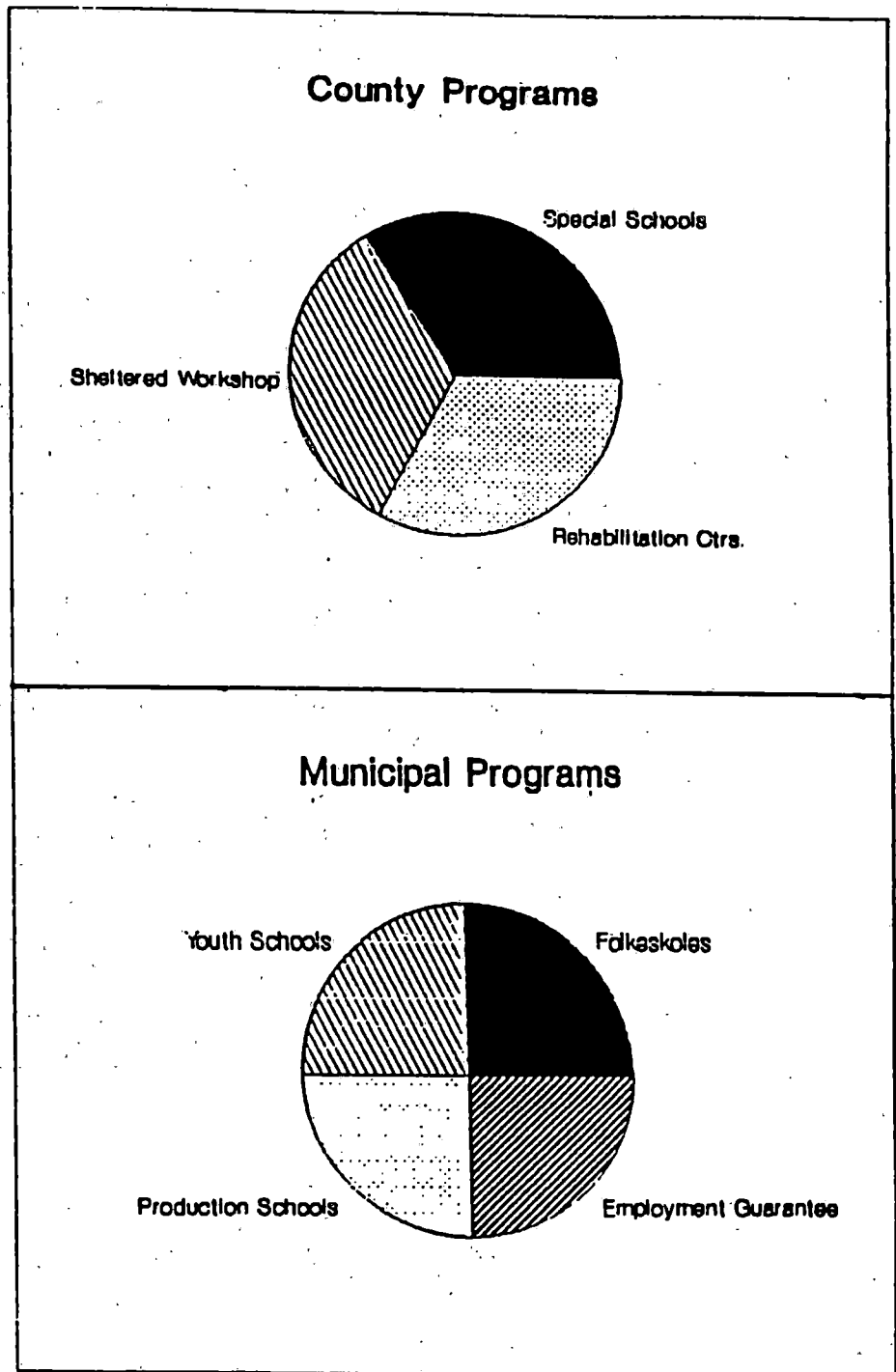
Figure 1 - Operation of Disability Related Programs

The Private Sector is responsible for (or shares in) the administration of the Continuation and Production Schools, and of Apprenticeship Training programs.

The fact that each Production School has its own governing body facilitates the ability of the school to make individualized arrangements for students with special needs.

**Finance of Upper  
Secondary  
Components**

In Denmark, public financing is provided for all components of the secondary and upper secondary systems of education and training including those administered by private agencies and organizations.



**Figure 2 - County and Municipally Operated Programs**

### ***From School to Working Life in Denmark***

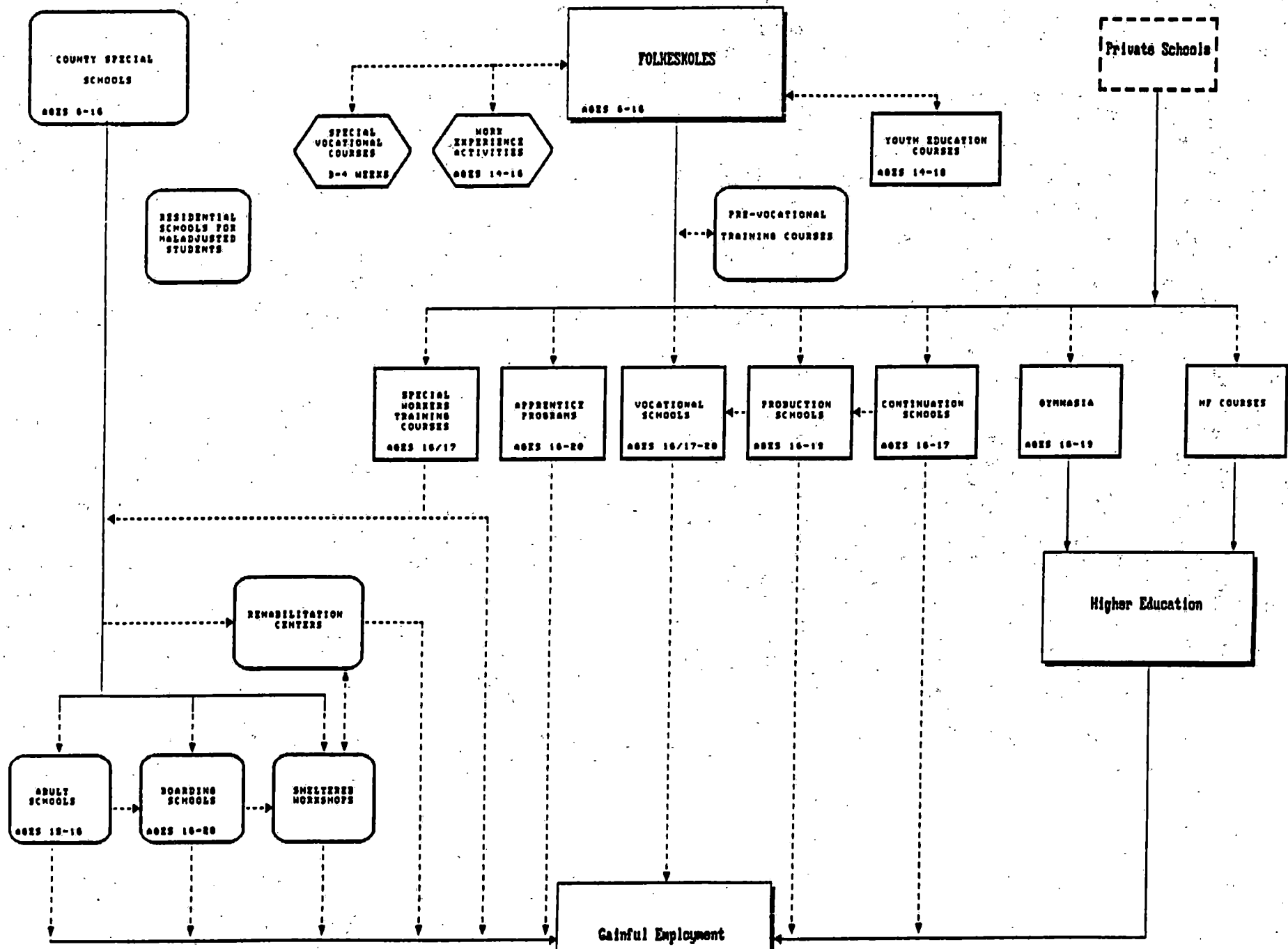
County and municipally operated programs are generally provided free of charge to students and are supported primarily by education and social service agencies at these levels.

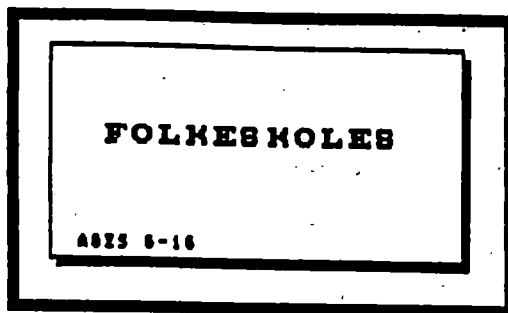
Private sector programs described above, in fact, receive 85% of their ongoing support from public funds and 15% from tuition charged to participating students. In addition, as discussed in Chapter V above, young persons with disabilities are generally eligible for special social service stipends which would cover the additional costs (i.e., tuition payment, books, transportation) of privately administered programs.

### **SYSTEM OVERVIEW**

Exhibit I on the following page presents an overview of the principal components of the Danish transition approach, including the Folkeskole, and Gymnasia and upper secondary vocational options which are selected by the vast majority of children with and without disabilities.

# THE STRUCTURE OF PUBLIC SECONDARY EDUCATION IN DENMARK



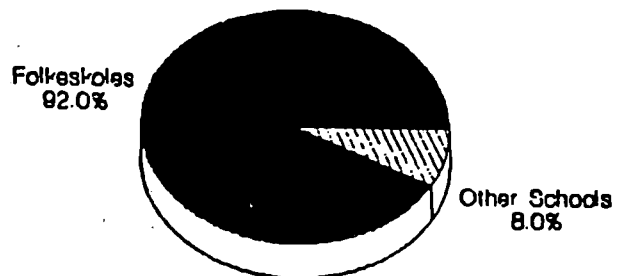


### **CHAPTER III – THE BASIC PROGRAM**

Over 630,000 children are currently enrolled in the public school system in Denmark. In Denmark special education services are provided to all pupils who have such difficulties in learning that they need special assistance.

At any one point in time, approximately 80,000 children (or 12.5% of the overall school population) enrolled in the Danish public school system receive special education services (see Figure 3). In fact, during the 1984-85 school year, special education

**Public School Population  
Children With Disabilities**



**Figure 3 – Regular and Special Education**

occupied 16% of the "teacher hours" within Danish Folkeskoles which were financed by the National Board of Education. During their overall period of school enrollment, approximately 160,000 (or 25% of the overall school population) will receive special education services for some period of time.

Within the basic school age population (ages 6-16), children with disabilities receive special education services in four types of schools: (1) Folkeskoles,

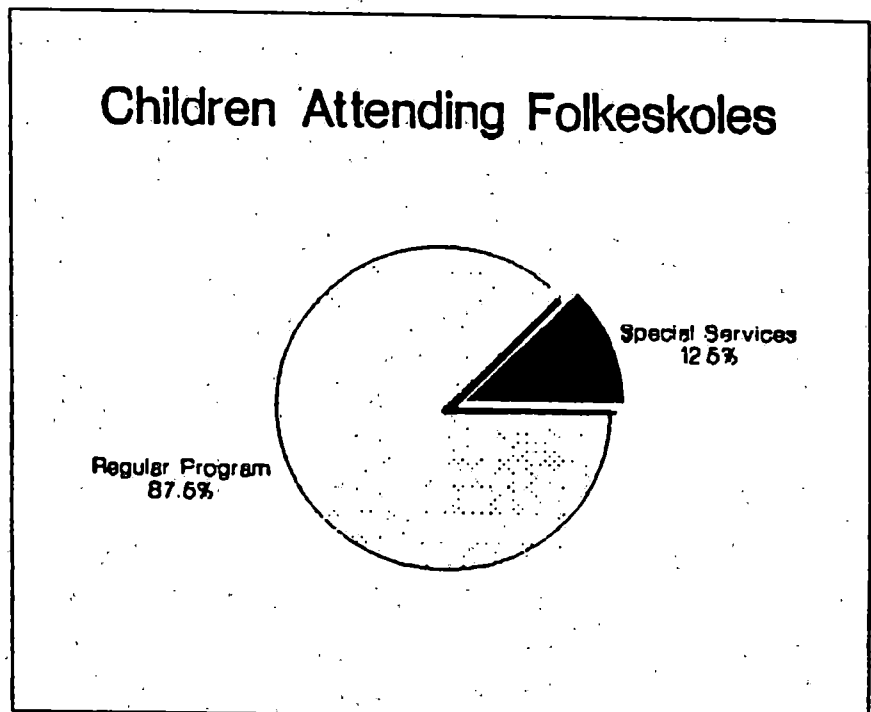
## *From School to Working Life in Denmark*

operated by municipal authorities; (2) special schools ("the Green schools") operated by county authorities; (3) residential schools operated by the Danish Ministry of Social Affairs; and (4) "private" schools. All "private schools", in fact, derive approximately 85% of their financial support from public funds.

Approximately 91% of all school age (ages 6-16) children within Denmark attend a public education program; over 98% of these children attend the basic Folkeskole. Over 92% of all children with disabilities attending public education programs are also enrolled in the basic Folkeskole programs (see Figure 4). The balance of children with disabilities are enrolled in "special school" programs (7.5%) and in residential school programs (0.5%).

### **THE DANISH FOLKESKOLE**

The American tradition of separating basic public education into two separate program components ("elementary" and "secondary") and sequencing public school enrollment among two or three different types of schools (e.g., elementary, middle and high schools) is not followed in Denmark. With the exception of a small percentage of the total school population enrolled in special and residential schools (described below), Danish children attend a single "Folkeskole" for



**Figure 4 - Enrollment Patterns**

## *From School to Working Life in Denmark*

primary and "lower" secondary education, (grades 1-9) the educational period for which education is compulsory for all children. The Folkeskole also provides an optional 10th grade program. "Upper secondary" education (grades 10-12) is not compulsory, is provided in a variety of educational settings outside of the Folkeskole and may take the form of either academic or vocational instruction or a combination of both.

In the Folkeskole instruction is given in a large number of subjects, most of which (i.e., 15) are compulsory for all children. Within the Folkeskole, most children remain in at least some classes with the same classmates throughout the nine or ten year program. The average pupil/teacher ratio in the Folkeskole is 18 to 1.

Most often, the same teacher (the "class teacher") begins in the early grades by providing all of the instruction to a single class for the entire school day and gradually decreases his or her role to one or two class sessions a day over a 3 to 6 year period. As a result, the Class Teacher usually becomes well acquainted with the parents and home background of all of the students in his or her class. Close consultation between teachers and parents is a hallmark of the Danish approach.

### **SPECIAL EDUCATION ELIGIBILITY CRITERIA**

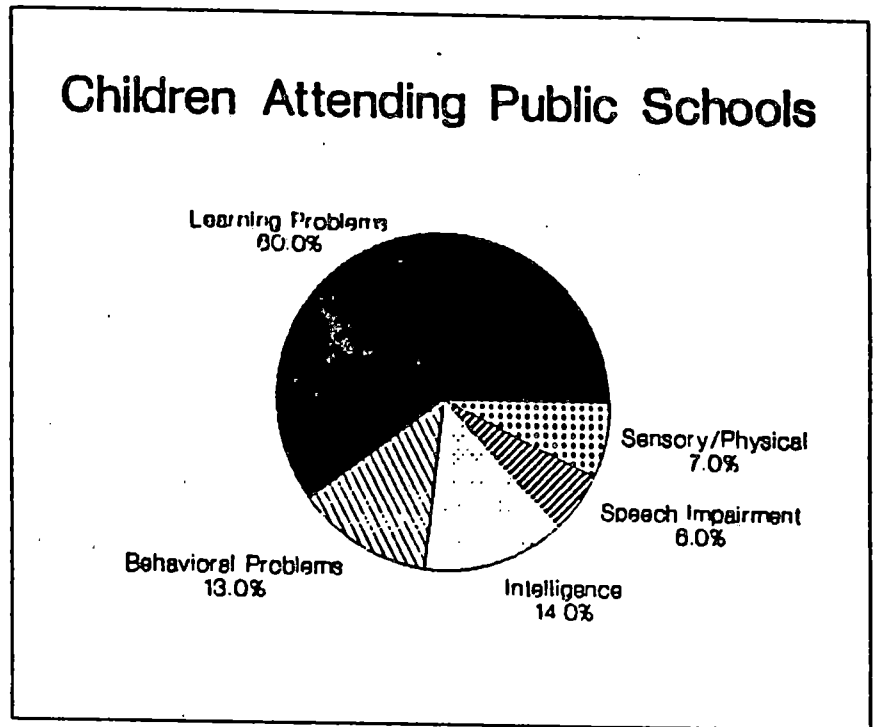
Specifically, within the Danish system, special education is provided to children in each of the following categories: (1) Children who have a need for a special educational method because of specific physical disabilities (e.g., blindness, deafness); (2) Children who need a special educational content because of general difficulties in learning (e.g., slow learners, children with psychological development disorders); (3) Children who need a special educational structure because of social adjustment difficulties (e.g., behavior difficulties, social and emotional disorders, psychological disorders); and (4) Children who need individualized and intensive special support because of specific difficulties (e.g., mental retardation, learning disabilities). In fact, twice as many boys as girls receive special services.

**The Special Education Population**

The overall "special education population" attending Danish public schools is composed of children in each of the following categories: (1) 60% children referred because of "learning problems"; (2) 13% children referred because of "behavioral problems"; (3) 14% children referred because of "intelligence" problems; (4) 6% children referred because of "speech impairment"; and (5) 7% children with identified sensory or physical impairments (see Figure 5).

Pre-school services (including "special pedagogical support") are available on a

voluntary enrollment basis to all children with disabilities between the ages of birth and 6. At present, the rate of participation of children with disabilities in the overall age group (i.e., birth to 6) in the pre-school programs is only about 20% of the overall population of children with disabilities in the age group. For the age group 5 to 6, however, approximately 85% of all children with disabilities are currently enrolled in the pre-school program. Pre-school services are conceived of as "special pedagogical support" for children to assist in their social, emotional, intellectual and physical growth and development.



**Figure 5 – Types of Special Needs**

The Danish Ministry of Education estimates that by 1990 the percentage of children with disabilities, ages birth through 6, receiving special pedagogical support will more than double.

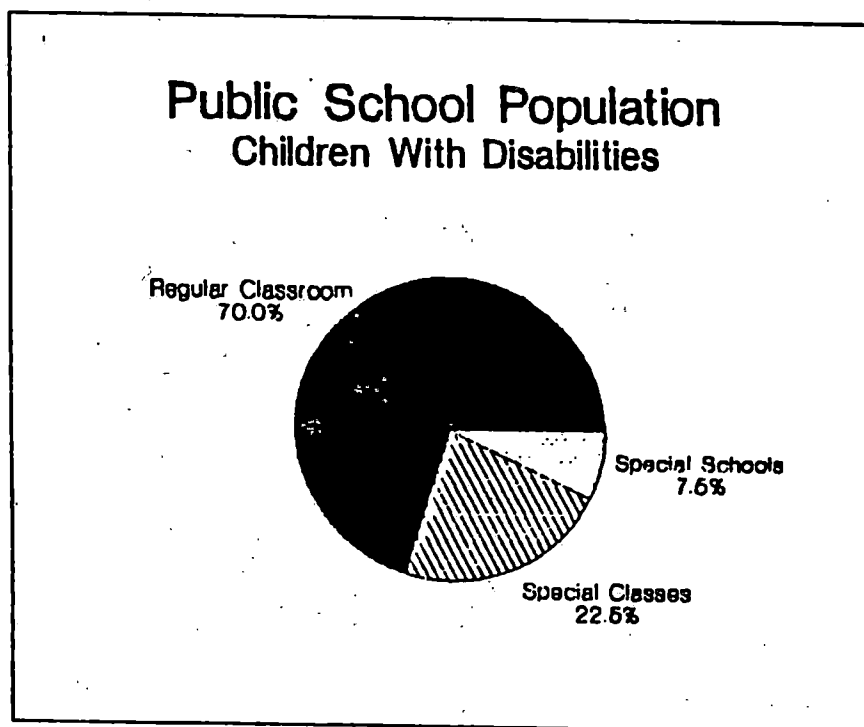
### EDUCATIONAL ISOLATION

By law, the Folkeskole is required to develop and operate an educational program which promotes each child's personal and social development. In order to accomplish this goal, each Folkeskole must provide special instruction and other special educational assistance for pupils whose development requires special support. Children with severe disabilities have a special right to 11 years of schooling (rather than the basic nine year guarantee).

Within the Folkeskole programs, children in need of special education services are served both in the regular school program and in special classes located within the school building.

The vast majority (70%) of children with disabilities, including most of the children with learning disabilities, speech impairments and visual handicaps, are served in the regular Folkeskole classroom.

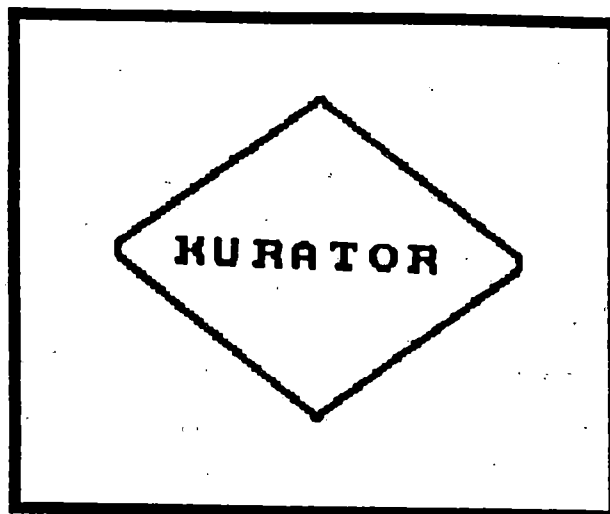
Approximately 22.5% of all children with disabilities enrolled in the Folkeskole system



**Figure 6 - Educational Isolation**

are placed in separate classes for most or all of the school day. Separate classes within a Folkeskole are usually offered for children within each of the following categories: (1) "psychotic"; (2) "brain damaged"; (3) "severe reading difficulties"; (4) hearing impaired; and (5) physically handicapped. Children with more severe disabilities are usually enrolled in a County Special School (described below).

In terms of educational isolation (i.e., separation from non-handicapped peers), Danish public education programs provide special education to children with disabilities (ages 6-16) in the following manner: (1) 70% of all disabled children are educated in the regular classroom setting; (2) 22.5% of all disabled children are educated in special classes within regular Folkeskoles; and (3) 7.5% of all disabled children are enrolled in special schools (see Figure 6).



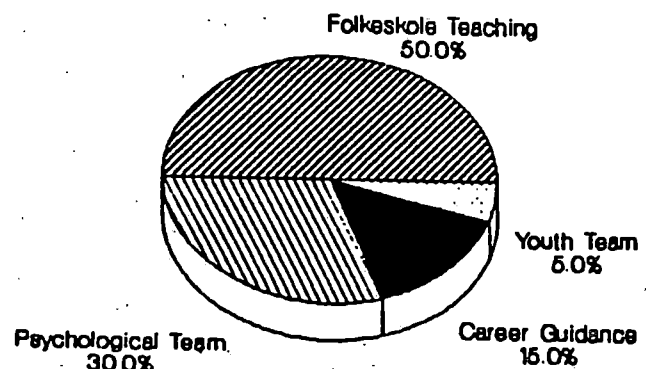
## **CHAPTER IV – THE KURATOR**

Within Denmark an innovative system has been developed to maximize the potential of young adults to transition successfully from school to adult and working life. This system involves the use of a "case advocate" or "Kurator"

who provides ongoing assistance to young persons with disabilities (age 13 on) and their families in support of transition from school to gainful employment and community life.

A Kurator is an experienced Folkeskole teacher who is appointed by the local school authority to provide a variety of support services to young persons with disabilities and their families. Primarily regarded as a teacher and as a member of the School Psychological Team, the Kurator is allowed a reduction in teaching hours commensurate with his or her caseload of students with disabilities. Each

### **Allocation of Effort**



**Figure 7 – Functions of the Kurator**

municipality is free to work out its own local plan for the Kurators who are employed at different schools.

### **COUNSELING, CAREER GUIDANCE AND TRANSITION SUPPORT ROLES**

Within Danish Folkeskoles (and increasingly within County Special Schools) extensive systems of "school psychological" and "career guidance" services have been developed to assist students and their families throughout the basic education program. The psychological service system incorporates what in American school systems would be called personal and family counseling services, social work services and psychological services. The career guidance system embraces what in American schools would be called academic counseling, career counseling and transition support services.

In addition to the general services (available to all students) provided by both systems, special services within both systems are provided for students with disabilities by a "Kurator." Within the Folkeskole, the Kurator works closely with the Class Teacher to ensure continuity in overall educational planning and service delivery. The effectiveness of this "linkage" is a critical element in the overall system and, in certain circumstances, the Kurator may actually be the Class Teacher.

The Kurator also plays an important role in coordinating services between educational programs and the county social service agencies. Finally, in many jurisdictions, the Kurator also functions as an important member of the local "Youth Teams" (see Figure 7).

### **THE SCHOOL PSYCHOLOGICAL TEAM**

Within each municipality, a school psychological team must be assigned to each Folkeskole. Depending on the number of students enrolled at the Folkeskole, one team may be assigned to a single school or to two or more schools. A school psychological team is composed of one supervisory psychologist (who is always a teacher with a degree in psychology), a clinical psychologist, a pedagogical

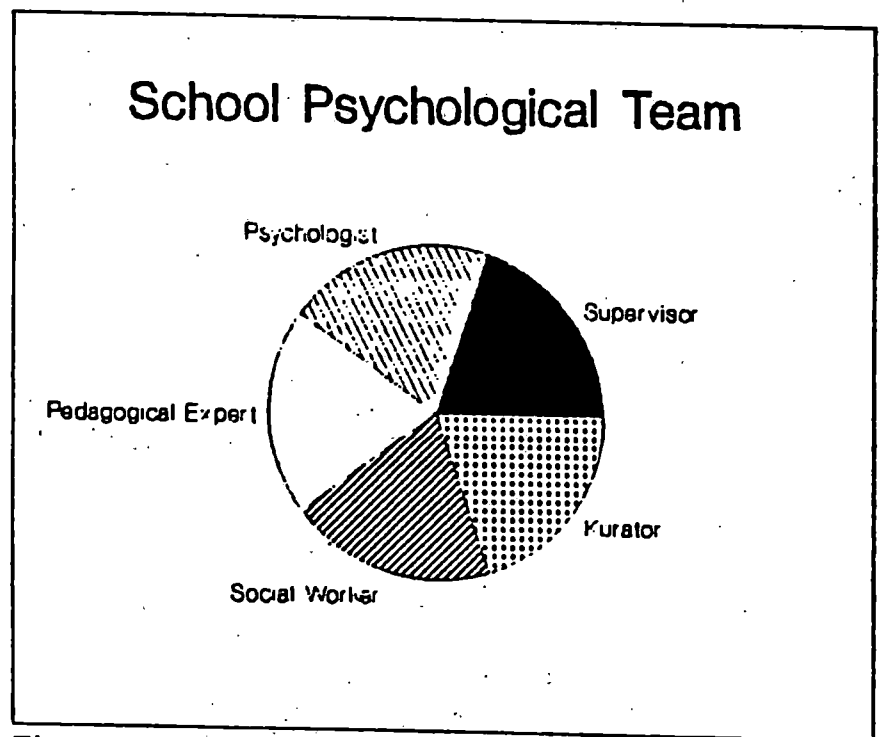
counselor (a person specially trained regarding the education of students with disabilities), a social worker and a Kurator (see Figure 8). For the Kurator, the School Psychological Team provides the base of operations.

The basic functions of the team as it relates to children with disabilities include special pedagogical assistance to infants and their families, direct pedagogical support of both special and regular class teachers, pedagogical and psychological counseling of children and parents, research and in-service training of school staff. As a member of the School Psychological Team, the Kurator provides guidance and assistance to young persons with disabilities concerning personal matters during their period at school and during the first years after leaving school.

The Kurator does no psychological counseling as such. When such counseling is needed, it is provided either by the school psychologist or some other expert in the field. However,

because the advice provided by Kurators to young persons includes personal matters such as the home environment, peer relationships and leisure time activities, Kurators inevitably find themselves involved in some form of psychological counseling with young persons. Similarly, experience demonstrates that

Kurators also devote a significant time to counseling the disabled young person's



**Figure 8 - The School Psychological Team**

family on matters such as marriage, divorce, and problems with other children. One major goal of the assistance provided by Kurators, however, is to enable the disabled young person to make his own decisions and to live an independent adult life.

#### **COORDINATION WITH INSTRUCTIONAL STAFF**

Within the Folkeskole, the Kurator works with the Class Teacher, the head teacher, others working with school psychology guidance, the school nurse, the school doctor and other personnel from social and health administrations.

#### **The Class Teacher**

The Class Teacher (usually the Danish Teacher) is assigned to an individual child throughout their entire Folkeskole enrollment and, as a result, often develops a thorough understanding of the child and a close relationship with the child's parents. Coordination between the Kurator and the class teacher is important and consensus is sought regarding the approach which the Kurator will propose for the individual student. In order to get to know the students and the parents as well as possible, the Kurator frequently makes use of class meetings arranged by the Class Teacher.

In addition to information gained from the Class Teacher and through direct contact over a long period of time, the Kurator may also seek additional information concerning the student from other teachers, the school doctor and the school psychologist.

#### **"THE CAREER GUIDANCE TEAM"**

As is discussed earlier, each Folkeskole student is assigned to a particular Class Teacher. Class Teachers are provided release time (from regular teaching duties) to provide personal guidance to students on their caseload. When Folkeskole students reach grades 7 through 10, Class Teachers when asked for

career guidance by individual students usually seek assistance from the Guidance Teacher. The Class Teacher may elect to work cooperatively with the Guidance Teacher or to refer a student to the Guidance Teacher for career guidance services.

### Guidance Teachers

The Guidance Teacher provides guidance to pupils in the 7th through 10th grades concerning choice of subjects at school, continuing education and occupational possibilities. For non-disabled students, guidance teachers arrange for work experiences and arrange for guest speakers from different occupations and training institutions.

### The Kurator's Role

A primary goal of the Kurator system is to help young persons with disabilities integrate into the work force. Because these students often find it much more difficult to enter the work force because of their disability, Danish policy makers believe that such students require more active assistance in the transition process than they would otherwise receive from guidance teachers within the standard Career Guidance System.

As a practical matter, students with disabilities who are enrolled in regular classes are "referred" to the Kurator by the Class Teacher or the Guidance Teacher if, and when, either or both of these school staff members believe that an individual student has guidance needs which require special expertise. In the event of such a referral, the Kurator may assume full responsibility for the student or work cooperatively with the Class Teacher and/or Guidance Teacher on an ongoing basis.

For students with disabilities enrolled in special classes within the Folkeskole, particularly with regard to students with general difficulties in learning, the Kurator plays the principal guidance role, sometimes described as that of "transition specialist", advisor and guide. As a principal provider of career

guidance, the Kurator gives educational and vocational orientation, sometimes together with the Class Teacher, to disabled Folkeskole students and arranges for occupational and job practice for the same students. Educational and vocational guidance courses are required for students in special classes in the 8th, 9th and 10th grades and ranges from two to five hours per week.

This ongoing teacher/pupil relationship permits the Kurator to become well acquainted with each of the young persons on his or her caseload. The Kurator gets to know the student's disabilities, his strengths, interests and personal characteristics. The Kurator has to be available most of the time for students on his or her caseload, who often telephone at awkward hours at home or visit the Kurator at home. This close contact is particularly important when the Kurator is called upon to provide assistance in identifying and arranging appropriate occupational introduction courses, work experience activities, and, in the 10th grade, work placement. Sometimes in cooperation with the Class Teacher, the Kurator is assigned the responsibility to provide necessary guidance to students while involved in work experience, work placement, job practice and various special days of training.

The Kurator gives advice on training and job opportunities during the Folkeskole years and on various upper secondary education and training programs which may be pursued after the completion of the Folkeskole program. With permission from the home, the Kurator can contact the occupational counselor at the public employment agencies and employers with a view to obtain work for the student.

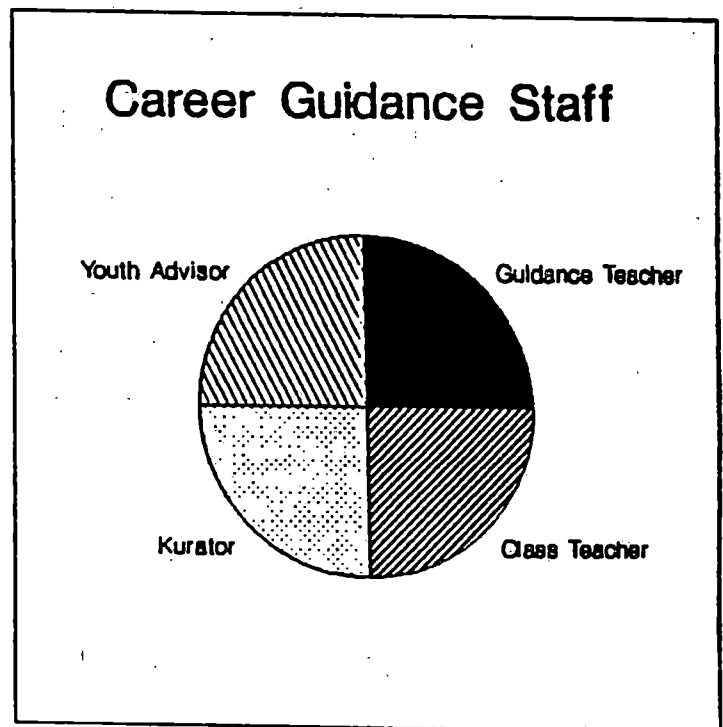
When the student has obtained a job and/or acceptance at a school for vocational and educational training, the Kurator can turn directly to the employer in question and/or school to make arrangements concerning special consideration, special education or other arrangements.

During the first years of "transition" to sheltered or gainful employment, the Kurator provides guidance in cooperation with parents and teachers. Figure 10 provides a summary of the variety of activities undertaken by the Kurator.

**Youth Advisor**

For students who have left the Folkeskole (because of "drop-out" or graduation), career guidance services are generally provided by a Youth Advisor. The Youth Advisor, who is often a Guidance Teacher, provides assistance concerning training and work possibilities to former students for up to two years after they have left school and at least until they are 19 years old.

The central goal of the Youth Advisor is to ease transition from school to further education and work. It is obligatory for the youth advisor to meet with the pupils twice a year until they are 19. In many municipalities, Kurators work as youth advisors and as such they can provide ongoing assistance to disabled students in the ordinary classes. In sum, the Class Teacher, Guidance Teacher, Kurator and Youth Advisor are all actively involved in the process of providing career guidance services to young persons with disabilities both inside and outside of the Folkeskole (see Figure 9). While these persons do not function as a formal "team", their interconnected roles and responsibilities require frequent and often ongoing team work.



**Figure 9 – The Career Guidance "Team"**

### LOCAL YOUTH TEAMS

A local Youth Council coordinates all the various guidance possibilities in the municipality for young people under age 25. The local council designates a local "Youth Team" composed of representatives from the various guidance systems in the municipality, including the school-based career guidance staff, youth counselors, and representatives from the social services agencies and the employment agency. In many municipalities, Kurators will also be included as members of this team as will representatives from local Production Schools.

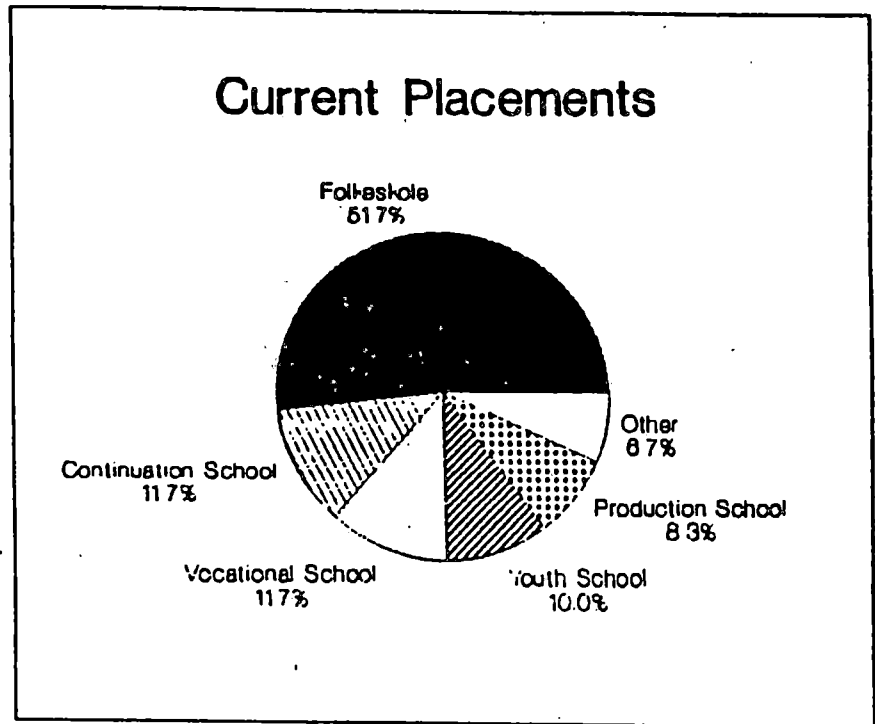


Figure 10 – Composition of Caseload

### THE CASELOAD

Disabled students have a right to have a Kurator as long as they are enrolled in a Folkeskole (or County Special School). The Kurator System was initially focussed on students with disabilities enrolled in special classes within a Folkeskole (usually for "slow learners") but was gradually expanded to include all students with special needs, including students who had "drop-out" from the

Folkeskole. After Folkeskole graduation, the services of the Kurator are usually available only upon request. In practice, however, virtually all Kurators continue to provide ongoing assistance to young persons with disabilities until students have reached the age of 19 with many students continuing to receive services well into their twenties. On the average, Kurators are assigned a caseload of approximately 60 students, 30 of whom are enrolled in a Folkeskole and 30 of whom are out of school or in the Vocational or Sheltered Paths. Figure 10 represents the composition of the typical caseload of a Kurator assigned to a Folkeskole in one Danish municipality. There is general agreement that a Kurator should devote 50% FTE to Kurator (as distinguished from regular teaching) activities. Most Kurators believe that the caseload should be reduced to 30-40 students on a 50% FTE basis.

The primary caseload of students with disabilities assigned to a Kurator consists of students in special classes in a Folkeskole which are organized for students with general difficulties in learning. Some of the students with general difficulties in learning have attended a special class from the first grade; others have been placed in such a class at a later stage.

As is discussed at length above, the Kurator also cooperates with the guidance teachers and the class teachers who work with disabled students who are integrated in regular classes. The Kurator also works with other students with disabilities. Children enrolled in the regular Folkeskole program are assigned to a Kurator whenever a written request is made to the School Psychological Team by the school and the parents. For students with disabilities in special class settings, the Kurator teaches different classes in the 8th, 9th, and 10th grades. Students with more severe disabilities who are enrolled in County Special Schools are, in most counties, provided with school psychological services including the services of a Kurator. In those counties where there are no school psychological teams, it is possible for the county to "buy" the service of a school psychological team, including those of a Kurator.

### ***COORDINATION WITH MUNICIPAL SOCIAL SERVICE PROGRAM***

Before a student leaves the Folkeskole in the 9th or 10th grades, the Kurator usually prepares a report containing an evaluation of the student's performance at school and an assessment of vocational and educational possibilities based on participation in vocational courses and work placement. This report often ends with recommendations on rehabilitation, economic support in connection with continuing education or other types of social service benefits. With the parents' permission, a copy of this report is sent to the municipal social service agency. A detailed description of the history and current operation of the Danish Social Service System is provided in Chapter II.

After receiving the Kurator's report, the social worker assigned to the particular case will arrange a meeting with the parents, the student and the Kurator to discuss plans for further training or education.

### ***ACTIVITIES WITHIN THE FOLKESKOLE***

The Kurator's activity within the Folkeskole is split among guidance, teaching and vocational support activities (see Figure 11).

#### ***Guidance Activities***

Kurators set aside specific hours each week during which they are available to students, their parents and other school staff in person and by telephone. The Kurator also attends coordination meetings and conferences conducted by the School Psychological Team and Youth Team to which the Kurator is assigned as well as others arranged by municipal, county or central authorities. During the 8-10th years of Folkeskole, the Kurator assists students in the selection of upper secondary academic and vocational programs (described in detail below). It is often the Kurator who recommends specific Continuation Schools, Production Schools or Vocational Schools to students and parents.

### Teaching Activities

The time spent teaching in the special classes and/or the ordinary classes is dependent on the number of hours a Kurator elects to teach. The obligatory teaching in the special class is two hours weekly orientation on education and vocations. The balance of the teaching activity may be on any subject in any grade. Some Kurators teach orientation classes in two or more schools.

Kurators also have a significant influence on the introduction of suitable courses

within the Folkeskole curriculum. Kurators are often involved in the modification or adaptation of basic curriculum objectives to include "social skill" and "work skill" objectives tailored to the needs of individual students with disabilities.

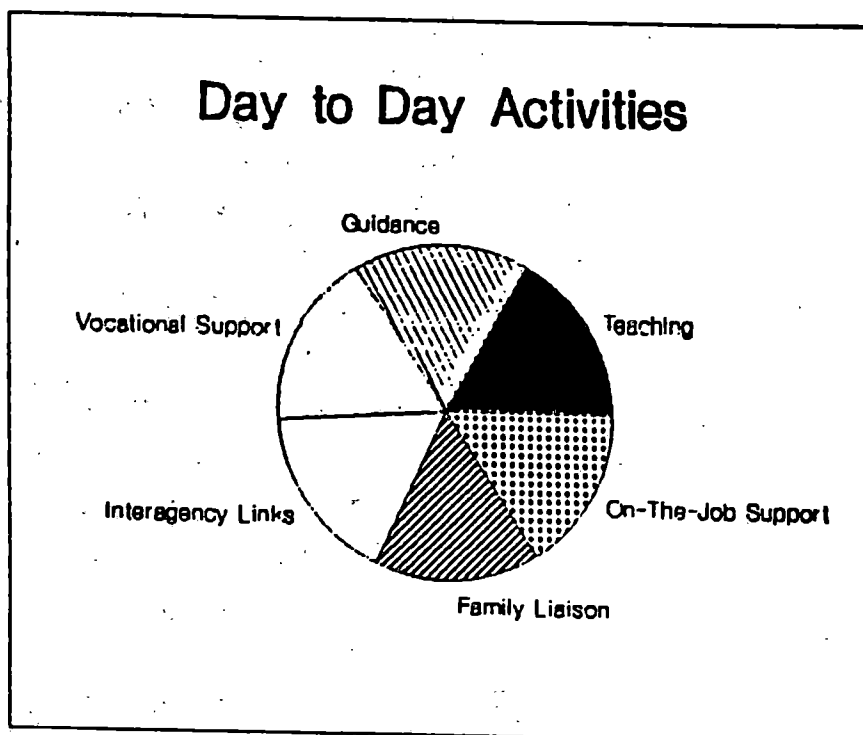


Figure 11 – Activities of Kurator

### Vocational Support Activities

The remaining hours of Folkeskole-based activities are devoted by the Kurator to visit students and employers at the student's places of work experience and work placement and at possible additional locations. The actual identification of

employers is an informal process where, for example, the Kurator might hear of an employer who needs additional help and might be interested in giving a disabled student a work placement for a year. On other occasions, a participating employer might enlist or recommend a colleague who is interested in the program. These informal contacts depend highly on the Kurator's knowledge of the local community.

During the 10th year of Folkeskole attendance, work placements (described in detail in Chapter V below) are made by the Kurator for individual students with disabilities. The Kurator visits the work placement site once a week in order to discuss any problems which may arise. The Kurator prepares a detailed report regarding the work placement after the first eight weeks period, a copy of which is sent to the parents.

In many Folkeskoles, Kurators prepare individual student "profiles" for use with employers in attempting to secure locations for both the work experience and work placement programs. These profiles typically contain information on how students work, what work they enjoy, and what they have accomplished. Employers find these profiles much more helpful than grades or examination results.

### **ACTIVITIES OUTSIDE THE FOLKESKOLE**

The Kurator's activities with respect to students no longer in the Folkeskole are primarily devoted to on-site visits to students enrolled in post-secondary and upper secondary programs and to family liaison.

#### **On-Site Visits**

Upon leaving the Folkeskole, some students choose to attend a Continuation School (described in detail below) either in the 9th or 10th grade or after the 10th grade. While students attend a Continuation School, the Kurator will follow the student's progress and when the student returns home, the Kurator will assist in

finding further training or sometimes work. The Kurator plays a similar function with regard to Production School, Special Adult School and Special Boarding School programs (all described in Chapter V below). Kurators also frequently monitor the initial adjustment and early performance of students on their first jobs.

The Kurator also works closely with students enrolled in Youth School programs. Here, the Kurator discusses with the student his or her impressions of the course and the experiences gained in order to provide the student with a more realistic picture of his or her own talent for the particular field in which the training has been provided. Throughout this process the Kurator has regular discussions with the student's parents and Class Teacher.

### *Family Liaison*

The parents of disabled students of all ages play an important part in their children's transition. The Kurator always attempts to visit parents in their own homes and thereafter maintain close contact. Home visits usually take place after office hours in order to enable both parents to be present. Parental involvement is required in decisions made concerning vocational training, work experience and work placement, and upper secondary academic or vocational education.

While young people with disabilities are involved in temporary or partial work or employment activities outside of the Folkeskole, parents usually turn to the Kurator when problems or questions arise related to these work activities. In this capacity, the Kurator serves as a "liaison" between families and employers.

### *QUALIFICATIONS, TRAINING AND EXPERIENCE*

As the discussion above has illustrated, the Kurator occupies a position of great strategic importance in ensuring the successful transition of children with special needs from school to gainful employment. In this capacity, Kurators are asked to undertake a variety of roles including, in varying proportions, "broker", "planner", "advisor", "advocate", "manager", and "provider". As a result, the personal qualities, training and experience which best prepare an individual for this

position are not easily identified or acquired.

### **Qualifications and Training**

First, and foremost, the Kurator must be an experienced and talented "teacher". The position of "Kurator" is not viewed as a supervisory or administrative position or as part of a separate career ladder but as a special post for particularly talented teachers with experience in the Folkeskole. Kurators believe that it is of crucial importance that they continue to serve as a regular Folkeskole teacher for at least 50% of their professional time. This continuing regular classroom role undoubtedly assists Kurators in the various coordinating roles (e.g., with the Class Teacher and the Guidance Teacher) which they must play within the Folkeskole. It also forces Kurators to spend time with children who do not have special needs and, thus, assists in "normalizing" the Kurator's activities and role.

While qualifications for the position of Kurator vary from municipality to municipality, a Kurator is always a teacher in a Folkeskole who has sufficient training from the Royal Danish School of Educational Studies to be permitted to teach in the first through the tenth grades. While most Kurators have no formal training in case work, most have received advanced training at the Royal Danish School of Educational Studies in special education and/or guidance teaching.

The Ministry of Education currently conducts a two week "development course" for Kurators. This course is conducted for one week during the first term and for another week during the second term of the academic year. The principal goal of the course is to discuss areas of work and to look at the various dimensions of the Kurator function. Plans are currently underway to establish a two-year program beyond the teaching diploma for experienced teachers wishing to become Kurators. Such a program might be structured as a special masters degree course of study.

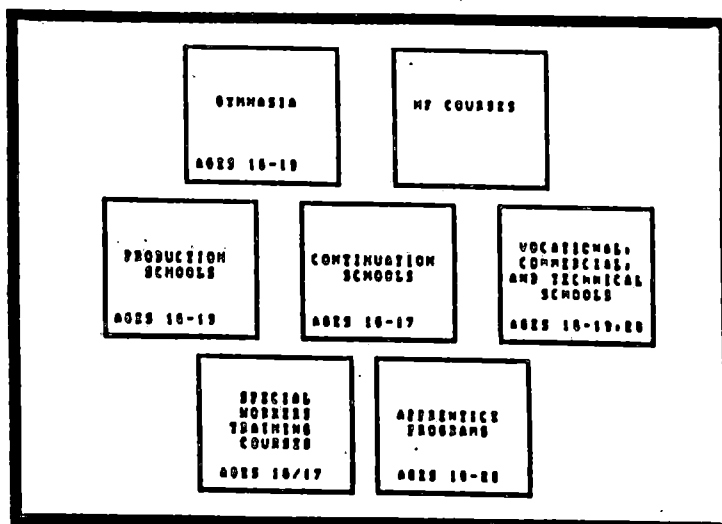
**Skills and Experience**

A Kurator should be a person who has lived in his municipality for a long time and must be familiar with the educational, training and social service institutions within and outside the municipality, including with local businesses and employers. The Kurator should have extensive experience with young people and should be well known to the students on his or her caseload and their parents. The trust of the student and the family in the Kurator is the single most important factor in the ability of the Kurator to succeed.

Other qualities and skills (competencies) which have been identified as crucial to the success of a Kurator, include:

- (1) Listening and counseling skills and empathy;
- (2) Teaching and behavior management skills;
- (3) Helping and motivational skills;
- (4) Social skills and flexibility;
- (5) Oral and written communication skills;
- (6) Bureaucratic and administrative knowledge and competencies;
- (7) Knowledge of the labor market and the structure and operation of "work";
- (8) Specialized knowledge and competency in community relations, vocational placement, and interagency relationships;
- (9) Personal stability and reputation.

The Kurator must be someone to whom children and adults would be likely to turn for assistance. A friendly resource, not a didactic professional!



## V – UPPER SECONDARY SCHOOLS

The unrestricted opportunity of children with disabilities enrolled in the Folkeskole system for participation in a wide range of

academic/vocational programs (often individually designed with the assistance of the Kurator) is an important feature of the Danish system. Within this upper secondary system,

Folkeskole graduates with disabilities may pursue one of two basic educational paths: (1) the Academic Path; and (2) the Vocational Path. The primary goal of the academic path is entry into the higher education system. The primary goal of the vocational path is gainful employment. In

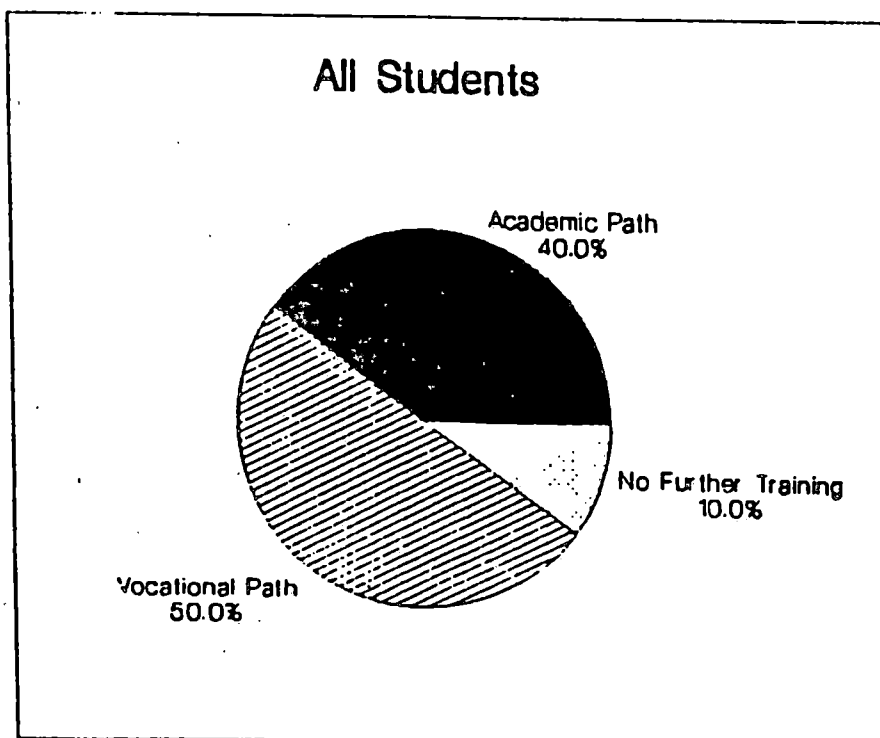
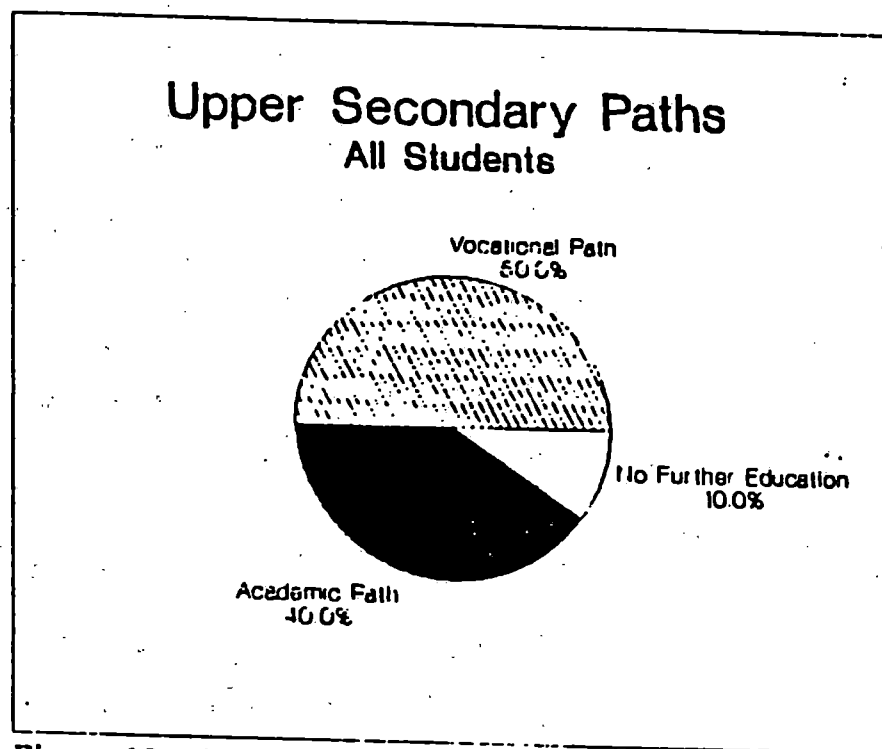


Figure 12 – Folkeskole Graduates

addition, because compulsory education is mandated (in the Folkeskole) to age 16, Folkeskole graduates may also elect not to pursue any form of upper secondary education.

At present, approximately 40% of all Folkeskole graduates elect the Academic Path, 50% elect the Vocational Path and 10% do not elect to enroll in upper secondary programs

(see Figure 12). A separate, Sheltered Path, has been established for those students reaching age 16 who are enrolled in the special school system operated by county authorities. The stated goal of the sheltered path is gainful employment. In practice, the primary goal appears to be productive



**Figure 13 - Upper and Post-Secondary Paths**

activity. Finally, a fourth path, the Adult Path, has been established for young adults over the age of 18 who are underemployed or unemployed. Because young persons with disabilities may continue to receive education and training for several years beyond completion of the basic education program (i.e., the Folkeskole or a special school), young persons with disabilities pursuing either the academic or vocational path may also utilize the adult system (see Figure 13).

### **THE ACADEMIC SYSTEM**

Students with disabilities who choose to pursue an academically oriented program after the completion of Folkeskole can aim for either courses at a Gymnasium operated locally by the municipality or separate courses leading to the HF or Higher Preparatory Examination (see Figure 13).

The Gymnasium offers a structured three year academic program similar to an advance preparation program in the United States. Most students who choose not to pursue a Vocational Path program during or upon completion of the Folkeskole move directly to a Gymnasium program to prepare them for the Higher Preparatory Examination required for university admission.

Within the municipality, special courses ("HF Courses") are offered as an alternative way of gaining qualifications necessary for higher and further education. An HF Course takes a minimum of two years and can be extended over a longer period of time. HF Courses, thus, can be taken at night school or at a Folk High School (described below). The only entry requirement for an HF Course is the completion of ten years of basic education. A few years of work experience or training of various kinds may also qualify for entry. Fewer than 1% of the young persons with disabilities currently pursue the Academic Path.

### **THE VOCATIONAL PATH**

Over 90% of all Folkeskole graduates with disabilities elect the vocational upper secondary path. The Vocational Path pursued by all Danish students has three basic components: (1) the Folkeskole component, including supplementary youth education programs; (2) a range of upper secondary vocational education and training options; and (3) special employment programs (see Figure 14). Each of these components will be described in turn.

#### **The Folkeskole Component**

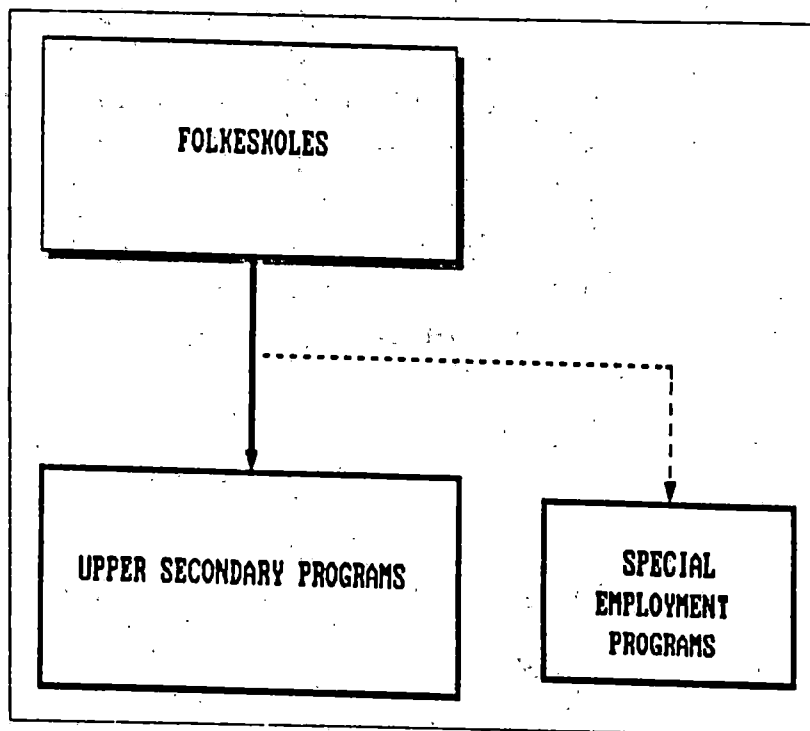
During the 8th, 9th and 10th years (ages 14-16) of Folkeskole education, students, with the assistance of a Kurator, may elect to participate in several programs designed to prepare the student for an upper secondary vocational path. These programs include (1) "special" career guidance classes taught by the Kurator and pre-vocational training courses; (2) work experience programs; (3) work placement programs; and (4) youth education courses (see Figure 15).

***Career Guidance and  
Pre-Vocational Courses***

During the 8th grade, disabled students attending special classes within the Folkeskole are first enrolled in special educational and vocational guidance courses taught by their Kurator. These courses focus on an introduction to the labor market and to a wide variety of occupational areas and

include instruction in each of the following areas:

- (1) Work Functions, including the interrelationships among organizational units, between fellow employees, and between employees and employers;
- (2) Co-Operation and Management, including approaches which may be used to influence working conditions and overall management of an enterprise;
- (3) Economics, including purchasing, sales, costs, expenses and profits;
- (4) Training Facilities, including both pre-employment and post-employment training programs;
- (5) Environmental Factors, including industrial safety, health and welfare, job satisfaction, pollution and the effect of these factors on production; and



**Figure 14 - Vocational Path Components**

## *From School to Working Life in Denmark*

(6) **The Enterprise and Society**, including the relationships of business enterprises with national, regional and local government, unions, and with other business and industrial organizations.

These introductory career guidance courses are provided two hours per week and may be supplemented by an intensive, short-term occupational orientation.

In the 9th grade additional courses are provided in **Conditions of Employment** (including apprenticeship, trainee, skill and non-skilled work, white collar work and civil service and unemployment) and **Management and Labor** (including employee and employer organizations and industrial disputes).

Within Denmark, the Ministry of Labor also operates 48 prevocational training centers which offer a special prevocational curriculum appropriate for students with severe disabilities. These courses range in duration from a few weeks to several months.

### *Work Experience Programs*

Usually offered in the 9th grade, work experience programs provide 1-2 weeks of actual work at several community sites. These short introductory "courses" are intended to provide a practical introduction to the labor market which has been studied theoretically through the career guidance courses. As part of these courses, Kurators discuss vocational interests, aptitudes and skills with each student on the caseload.

Work experience programs for students with disabilities are usually arranged by the Kurator who keeps in touch with local employers and their current labor demands in order to identify new work experience and work placement openings. Work experience placements for young persons with disabilities are often arranged by the Kurator after a discussion of vocational interests and skills. Work performed as part of a Work Experience Program is not compensated but often forms the basis for subsequent work placements or employment.

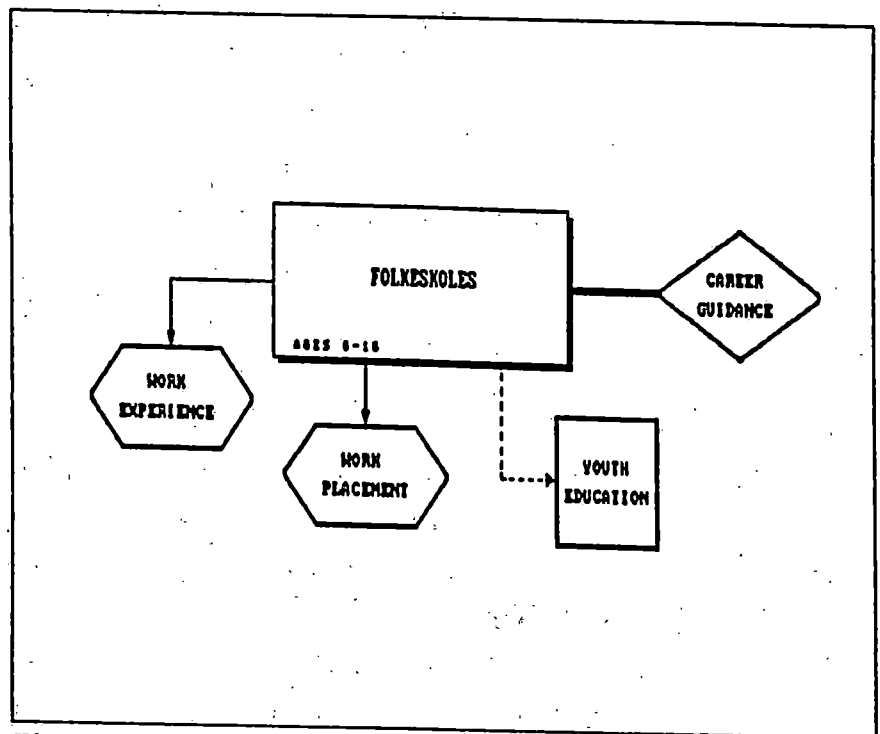
### **Work Placement Programs**

In the 10th grade students are given the option of participating in a Work Placement Program which offers a much more extended opportunity to gain work experience. Students choosing to participate in the Work Placement Program will devote a significant portion of the 10th grade in on-site work activity. In general, students participating in the program will adhere to one of the following schedules: (1) Attend school from 8-11:00 a.m. every day and devote the rest of the day to work; (2) Attend school three days a week and devote two full days a week to work; (3) Attend school two days a week and devote three days a week to work; or (4) Work full time for a period of time and then attend school full-time.

Work placement for students with disabilities is used by the Kurator to assist the student to establish a realistic idea of a work situation, gain confidence and become familiar with a particular place of work. Employers are

often persuaded by Kurators to restructure work in order to better accommodate students with disabilities.

Within the Work Placement Program, classroom based instruction focuses primarily on a discussion of work and personal problems and preparation for



**Figure 15 – Folkeskole Vocational Components**

## *From School to Working Life in Denmark*

integrated community living (e.g., paying taxes, how to rent an apartment). Working conditions, such as working hours and a stipend, are arranged with the Kurator for each individual pupil. If an appropriate stipend cannot be agreed to or if the student is unable to complete sufficient work to be paid such an amount, the local social services agency may provide the difference. If the student undertakes a work placement in a public establishment (e.g., in a day care center), the Folkeskole often provides the appropriate stipend.

One of the major dividends of the Work Placement Program for students with disabilities is the opportunity for the employer to get to know the student and learn how to structure work assignments to maximize the student's productivity and job satisfaction. Permanent job offers frequently follow the successful completion of work placements by students with disabilities.

### *Youth Education Programs*

Students attending the Folkeskole may supplement their Folkeskole program by enrolling in Youth Schools. According to legislation every local council must establish a youth school in a form tailored to local needs and wishes. These schools offer an annual program of activities for all young people in the municipality if they are between 14 and 18. Attendance is voluntary and no tuition is charged. Youth education courses are generally offered after Folkeskole hours and on weekends.

One important function of the Youth School strategy is to supplement basic instruction in areas where academic performance is weak. Youth Schools offer courses which alternate between theoretical and practical training. For students who do not have difficulties with learning Youth School programs usually provide structured but informal education addressed to hobbies and other leisure time activities.

Students encountering difficulties in the Folkeskole program may enroll in courses which supplement schooling, and special education courses for young unemployed youth between the ages of 16 and 25 are also offered. For those young persons who have dropped out of Folkeskole (usually labeled "school tired"), the

Youth School offers full time basic education as well as courses in specific vocational and avocational areas, e.g. in computer studies.

Several Youth Schools are frequently established within a particular community. For example, in Odense there are eight Youth Schools, one of which is attended by students with general difficulties in learning. These students are enrolled in "special" courses suitable to their individual needs even if there are as few as two such students enrolled. Generally, such Youth School students start with a four week Level I course during grades 8 to 10, mainly in practical subjects which are particularly suited for youngsters with general difficulties in learning. Students in these courses combine learning with "doing" in classroom groups of six to eight pupils. For example, students studying painting will learn about various types of paints, create sign boards and actually paint walls while experimenting with various painting techniques. Students studying "sausage making" are taught how meat is cut, how sausages are made, safety procedures for handling tools and personal hygiene around food preparation. Related occupations (e.g., meat packer, butcher) are also discussed. After a Level I course has been completed, the Kurator will make an evaluation of the student's performance and if the pupil is considered capable, he or she can continue in a higher level course. For more severely disabled students, increased teacher support is provided throughout the course. If a student has such severe disabilities that he or she is unable to benefit from a full Level I course, a special two week program can be arranged to provide the student with a certain foundation of experience which can be used for further training.

In Level II courses, students delve further into several of the vocational areas addressed by Level I, including automobile repair, food preparation, painting, gardening, navigation, farming, nursing, and welfare work. These courses last for 3 to 4 weeks and each student can take up to 3 different courses in a year. After finishing a Level II course, each student is assessed by the Youth School in several areas, including the student's ability to understand instruction, interests, concentration, cooperation, independence and initiative, and suitability for further training in a particular area.

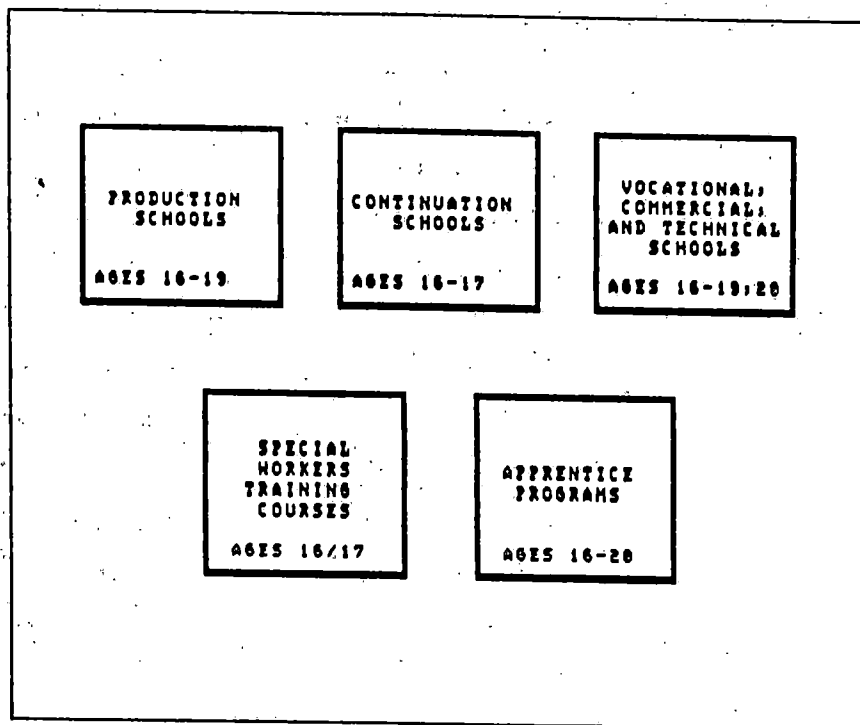
Level III courses are mainly offered in the 10th grade to students who desire to embark on intensive training in a particular vocational field (e.g., building trades, metal/iron production; food industry).

**Upper Secondary Vocational Options**

After completion of the Folkeskole program, two basic options exist for students who wish to pursue a formal upper secondary educational program. The first, which is described above, is the Gymnasium alternative on the Academic Path. The second, the upper secondary options open on the Vocational Path to gainful employment, are described below (see Figure 16).

These Upper Secondary Vocational Options include enrollment in: (1) Continuation Schools; (2) Production Schools; (3)

Vocational, Commercial and Technical Schools; (4) Apprenticeship Programs; and (5) Special Workers Training Courses.



**Figure 16 – Upper Secondary Vocational Options**

### ***Continuation Schools***

The students interested in pursuing the vocational path may elect to spend their last year or two of Folkeskole in a Continuation School. At present, approximately 200 Continuation Schools operate within Denmark, enrolling anywhere from 30-160 students. Continuation Schools provide an intensive, one or two-year boarding school program which stresses both basic education and vocational training. These schools offer the compulsory subjects necessary for students preparing for final Folkeskole examinations and award a Diploma.

Approaches to the teaching of theoretical and practical knowledge differ widely among Continuation Schools. Kurators working with students and their families attempt to match the goals and philosophy of a particular school with the individual needs of each student. Most Continuation Schools provide an effective educational and vocational environment for students with disabilities through a combination of academic instruction and practical work training and experience.

### ***Production Schools***

In Denmark, there are 65 Production Schools currently enrolling approximately 2,300 students, most of whom are between 16-19 years of age. These schools, which enroll significant numbers of students with disabilities, combine practical training with academic instruction. Their stated goal is proper vocational training for those who need it. In reality, a central purpose of the Production School is to develop motivation and restore self-confidence in students who were not making progress in the normal academic and vocational systems. Production Schools are operated by both municipal and county authorities, subject to the initial approval of the Ministry of Education. Since 1985, municipal and county authorities have been required to establish Production Schools in sufficient number to ensure that all young people who desire work training will receive it.

The total enrollment in Production Schools varies but most average between 50-100 students at any one time. The students who come to the school are mainly referred by a Kurator or a Youth Advisor and all have general difficulties in

learning. Some have been previously enrolled in special classes and others have been integrated in the ordinary classes in the Folkeskole. In order to facilitate Production School enrollment of students from other areas of Denmark, schools have established a special two week "trial visit" which permits a prospective student and the parents an opportunity to determine whether the Production School offers a suitable curriculum and instructional approach.

Each Production School concentrates on one or more specialized vocational training and work programs. As a result of this process, a wide variety of Production School programs is available, including cooking, textile manufacture, tractor driving, animal and fish husbandry, electromechanics, and computer sciences. The "products" yielded by the Production School programs are actually marketed and consumed within the Danish economy. In many instances, Production Schools have worked out cooperative arrangements with local businesses to avoid competition. These links with private organizations have also facilitated future employment opportunities for Production School graduates.

Teaching in Production Schools generally involves both formal and informal instruction. Reading instruction, for example, may concentrate on how to read instruction manuals or shop drawings, and mathematics instruction may focus on costing and pricing activities. Traditional instruction in subjects such as Danish, English, accounting or advanced mathematics are usually offered. A great deal of individual attention is available for students with personal and social problems.

Enrollment in Production Schools generally ranges from four months to one year. Students below the age of 16 are also allowed to enter Production Schools with special permission from the Ministry of Education. Five such young pupils can be admitted at the same time. Students attending Production Schools are paid a certain stipend each week, some of which comes from the sale by the school of the products created through the vocational program. Each Production School has its own governing body which facilitates the ability to make individual arrangements for students with special needs.

*Vocational, Commercial and Technical Schools*

After completion of the 9th or 10th grade of the Folkeskole, students may seek to enroll in the most prestigious of the Vocational Path programs, the Vocational School or "EFG" program. This 3-5 year program consists of an initial, one year academic program followed by from two to four years of vocational training which consists of both theoretical training at the school and practical training at a place of work.

Students enrolled in Vocational Schools must select one of eight major vocational areas for intensive instruction:

- (1) building and construction;
- (2) graphic industries;
- (3) commercial and clerical work;
- (4) iron and metal industries;
- (5) agriculture;
- (6) overland transport;
- (7) food industries; and
- (8) the service trades.

The first (academic) year of the program is provided by a technical, commercial or other vocationally-oriented school and is devoted to core academic subjects, practical training in school workshops, vocational theory related to the vocational field of interest, and a few elective subjects. Vocational theory and training courses are offered within each of the eight vocational areas. For example, the first 20 weeks of the Building and Construction area curriculum exposes all students to basic instruction regarding electrical systems, plumbing, brick and concrete laying, glazing, wood trades and painting. Following this "core instruction", students then select one of these sub-areas for more intensive study during the balance of the first year and thereafter.

This second and more intensive phase of vocational study is further subdivided into a series of courses aimed at preparation for specific professions (e.g.,

carpenter, cabinetmaker, woodworking machinist). The subsequent years of vocational training take place at both the workplace and school. Completion of the vocational program is usually marked by the issuance of a Diploma.

Vocational schools are operated both by the State and by private organizations. No special vocational programs for students with disabilities are operated by Vocational Schools. Such students are guaranteed admission by Danish law and Vocational Schools stress teacher differentiation, remediation and other strategies to assist students with learning problems master the basic curriculum and subsequent vocational curricula. Approximately 8-10% of all first year vocational school students will receive some sort of specialized, supplementary assistance. Students successfully completing a Vocational School program have completed all courses needed for the Basic Secondary Examination. If successful, students are then free to pursue higher education alternatives.

In addition to the traditional Vocational School program described above, students leaving grade 9 or 10 of the Folkeskole may enroll in a wide variety of Commercial and Technical Schools offering vocational instruction in fields outside the eight vocational areas addressed by Vocational Schools. These schools are operated by private organizations and generally provide instruction over a 2-3 year period. Students successfully completing a Commercial or Technical School program may have completed all courses needed for the Basic Secondary Examination.

### ***Apprenticeship Training***

Young persons entering Apprenticeship Training elect to pursue one of the eight vocational fields listed above. Among these eight fields over 130 different trades have been identified. Many of the specific occupational categories available within the Apprenticeship Training program are not available within the Vocational School program. For example, there are 47 separate occupational fields within the Iron and Metal Industries area. Apprenticeship training is offered in 20 occupational areas not addressed by the corresponding Vocational School curriculum (e.g., coppersmith, tractor mechanic, automobile electrician) and

Vocational School training is offered in 11 occupational categories where Apprenticeship Training is not offered (e.g., machine tool fitter, industrial pipesmith, body mechanic). To complete the picture, there are 16 occupational categories in which vocational training is offered under both programs. The choice of Vocational School vs. Apprenticeship Training, thus, often depends on the interest of students in particular occupational areas.

Apprenticeship Training in Denmark takes from two to four years and may be initiated after nine years of basic education. Training takes place alternately at a Technical School or other vocationally oriented school and under the supervision of a master craftsman at the workplace. Danish law prescribes a fixed number of weeks of day instruction per year. Apprenticeship Training terminates with the award of a Journeyman's Certificate, which gives the status of skilled laborer. The certificate may also act as a basis for further education and training, for example in architecture or engineering.

#### *Special Workers Courses*

The Danish Ministry of Labor operates approximately 30 Special Workers Courses throughout Denmark for young persons below the age of 18. Over 500 different courses are offered within 25 different vocational fields, including hotel and restaurant management, brewing, metalworking, textiles and garment making, heavy equipment operation, plastics fabrication, transportation and film production. These courses provide instruction to a significant number of young persons with disabilities who have previously attended Folkeskoles and either Continuation or Production Schools.

Special Workers Courses concentrate almost entirely on vocational training, with a heavy emphasis on direct work experience. Courses offered range from 1 to 4 weeks in duration and can be taken independently or as part of a sequence leading to specific job mastery. Courses are often offered in close cooperation with Danish government agencies such as the Danish National Railways.

## *From School to Working Life in Denmark*

### *Special Employment Programs*

The Municipal Youth Employment Guarantee and the County Employment Program (including the Special Employment Subsidy) complete the overall design of the Danish Vocational Path to gainful employment. The County Employment Program also forms an important part of the Sheltered Path to gainful employment (discussed below).

### *Municipal Youth Employment Guarantee*

By law, Danish municipal authorities must establish and operate a local Youth Employment Program which guarantees a year of employment to every young person between the ages of 18-20 who is not enrolled in a school program. In Odense, the Municipal Youth Employment Program is divided into three sections. Section 1 is an introductory 10 week session designed to provide a general orientation within the world of work. Section 2 of the program is a 12 week intensive educational and vocational training activity. All young persons attending Sections 1 and 2 programs receive a stipend from the municipality.

Section 3 of the Municipal Youth Employment Program is a 24 week work experience activity in which participants receive on-the-job training while carrying out basic job responsibilities at a regular work site. Section 3 participants receive a regular salary for the work performed.

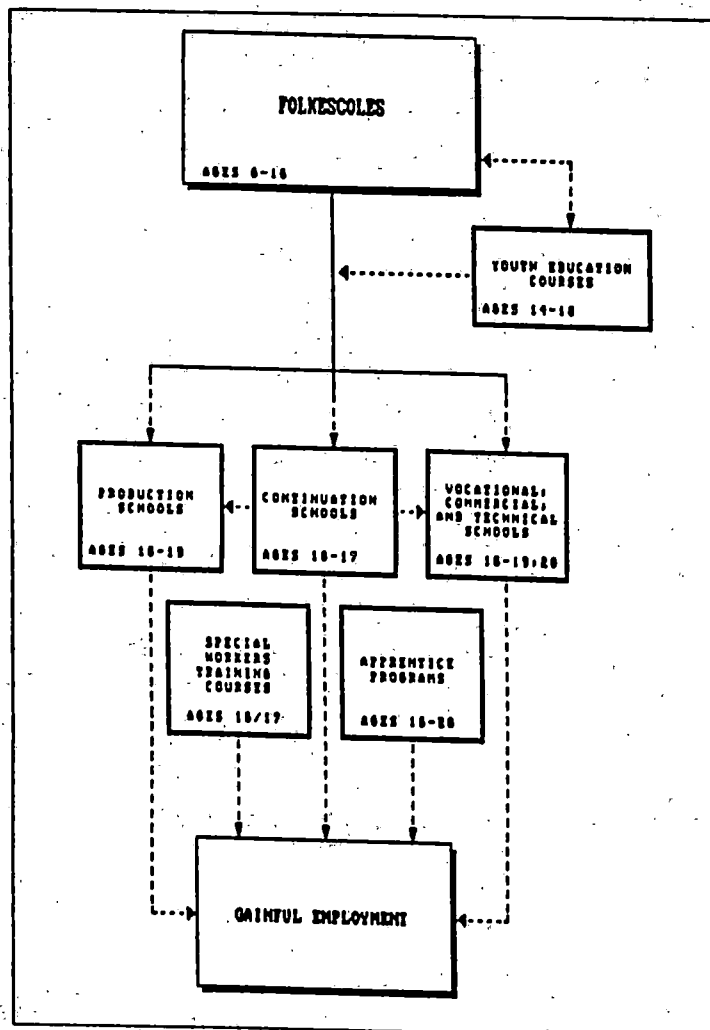
### *County Employment Programs*

The Kurator works closely with the County Employment Agency to make work placements and secure permanent employment for students with disabilities participating in both the Vocational and Sheltered Path systems.

Young persons with disabilities who have a functional level of at least 60% of normal work capacity may receive assistance from the County Employment Agency to acquire permanent employment. In that case, the municipality and county will

pay 40% of the salary, and the employer the remaining 60%.

For young disabled persons with functional levels below 60%, County Employment Agencies provide assistance in obtaining sheltered work and, based on the work done, contribute at least 33 1/3% of the salary. Municipal Departments of Social Services in Denmark may provide salary subsidies to support up to six months of training for young persons with disabilities seeking initial entry into the labor force. These subsidies are available for any training program which will significantly improve the young person's work competence or prospects of getting permanent employment in the public or private employment sector during that period. Municipal Departments of Social Services may also provide salary support for up to 24 months for young persons with severe disabilities who are attempting to sustain private sector gainful employment. A chart showing the interrelationship among Vocational Path components is presented in Figure 17.



**Figure 17 – Interrelationship of Vocational Path Components**

**THE SHELTERED PATH**

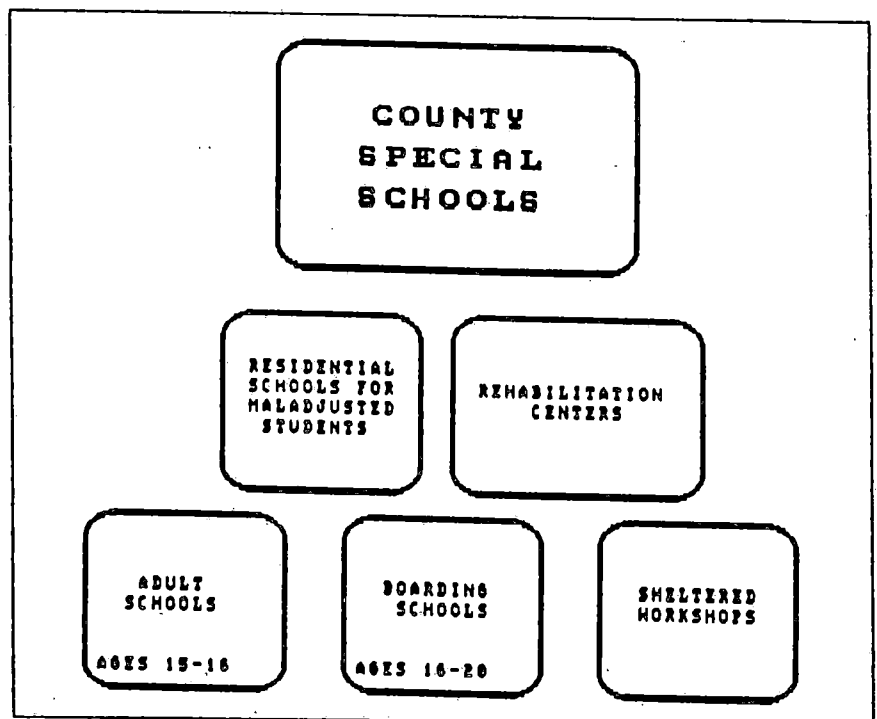
The Sheltered Path has five basic components: (1) County Special Schools; (2) Special Boarding Schools; (3) Special "Adult" Schools; (4) Sheltered Workshops; and (5) Rehabilitation Centers. In addition, the Danish Ministry of Social Affairs operates a series of Residential Schools for Maladjusted Children (see Figure 18). Each of these components is discussed, in turn, below.

**County Special Schools**

Approximately 7.5% of all children with disabilities (less than 1% of all school children) are placed in County Special Schools for their basic education program. These separate, self-contained schools are operated for children with severe disabilities ages 6-18. In practice, they provide an educationally isolated alternative to the Folkeskole program.

Traditionally, County Special School systems have operated under the general supervision of the Danish Ministry of Social

Affairs and include separate schools for deaf children, physically handicapped



**Figure 18 - Sheltered Path Components**

children, psychotic children and mentally retarded children. County Special Schools also have provided short-term programs for blind children. Most of the special schools operated for children with disabilities other than mental retardation are 24 hour residential programs. A majority of profoundly deaf students in Denmark attend County Special Schools.

The County Special Schools for mentally retarded children (formerly known as the "Green Schools") enroll a substantial percentage of all children in the county with mental retardation (including virtually all children with Down Syndrome), autism and with certain combinations of mental impairments (e.g., mental retardation, psychotic). Most children who attend County Special Schools are initially enrolled in these schools and have never attended a Folkeskole. The balance of the children enrolled in County Special Schools are "placed" by Folkeskoles on the basis of the severity of disability. It is extremely unusual for a child enrolled in a County Special School (except in the short-term program for blind students) to transfer from a County Special School to a Folkeskole. The County Special Schools offer a 7-8 hour instructional day and provide intensive services in classes with a very high teacher/pupil ratio.

As a result of legislative changes implemented in 1980, the legal responsibility of local municipalities to provide special education services for all children was vested in the Ministry of Education and local municipalities. Consistent with this legislative mandate for school integration, a serious effort is currently under way to close County Special Schools. The current target date for the elimination of all County Special Schools is 1993. The current plan is to use the special school campuses as resource centers providing assistance to students and teachers in municipally operated Folkeskoles.

### **Special Boarding Schools**

Special Boarding Schools provide an intensive, two year residential program for young persons with severe disabilities 18 years of age or older. Young people enrolling in the Special Boarding Schools come chiefly from the County Special School system and have general difficulties in learning. The two-year,

coeducational program offered by these County operated schools includes special education in Danish and math, and lessons on cooking, economy, textiles, languages, hygiene, sex education, music, drama, art and physical education. During the second year of the program, students are given practical work experience outside of the school.

Enrollments in the Special Boarding Schools vary but average approximately 25. Schools stress the "adult status" of their students but maintain close ties with parents, most of whom continue to be interested in their children after age 18.

Each student has his own room with his own key and the development of community living skills is an important objective of the school program. The Special Boarding Schools are divided into classes of 5 or 6 students. Each class has a flat consisting of sitting room, kitchen and dining area and is responsible for planning and preparing their own meals. Students are allowed maximum personal freedom in terms of sexual behavior and living arrangements. The students enrolled in the Special Boarding Schools during their final year also receive intensive training in living on their own and are provided the opportunity to do so for two periods of ten weeks each. Many Special Boarding School students also enroll in Youth School courses during their leisure time.

Enrollment in the Special Boarding School is usually arranged by the Kurator, who secures permission for the placement from County social service officials. Parents, together with their adult child, are also involved in the placement decision and usually visit the work placement site before the placement is formally made.

### **Special "Adult" Schools**

Special Adult Schools provide education to young persons and adults with moderate and severe disabilities from ages 16-18. Schools are operated by counties and enroll students who previously attended special classes within Folkeskoles or County Special Schools. Some of these young persons are referred by Kurators. Older persons with disabilities are also referred to the Adult Schools by social services agencies. Students who have been pupils in the Folkeskole are

generally referred to the Special Adult Schools when all other education strategies have failed.

There is no fixed period of enrollment in the Special Adult Schools and some of the students begin at age 16 and continue in the overall school program for the rest of their lives. County Adult Schools vary in size, with an average enrollment between 50-100 students.

For students intending to transition from the Adult Schools to sheltered or competitive employment, Special Adult Schools provide a three year curriculum which involves both school-based and work-based instruction. School-based instruction ranges from art work to speech training to indoor football and gym. External, work-based instruction is often provided by teachers at Sheltered Workshops and Rehabilitation Centers and addresses areas such as appropriate work behavior and the management of money earned. As part of the program, schools organize camp activities and trips to foreign countries.

### **Sheltered Workshops**

Sheltered Workshops are operated throughout Denmark by County agencies. There are two separate types of Sheltered Workshop programs: High Production Workshops and Low Production Workshops. High Production Workshops represent approximately 20% of the total number of Sheltered Workshops. Students are encouraged to attend Sheltered Workshops as close to home as possible and the system makes attendance at an out-of-county workshop very difficult.

### **High Production Workshops**

High Production Workshops provide intensive work training programs which concentrate on the development of both general work and specific job skills. Students entering High Production Sheltered Workshops primarily come from Special Boarding Schools, County Special Schools and Rehabilitation Centers.

Kurators also use High Production Workshops as work placement sites for students unable to function successfully in ordinary employment. These special

## *From School to Working Life in Denmark*

work placement programs generally last for a period of eight weeks. Arrangements can be made with the County social services agencies for a stipend for those students who do their work placement at the Sheltered Workshop.

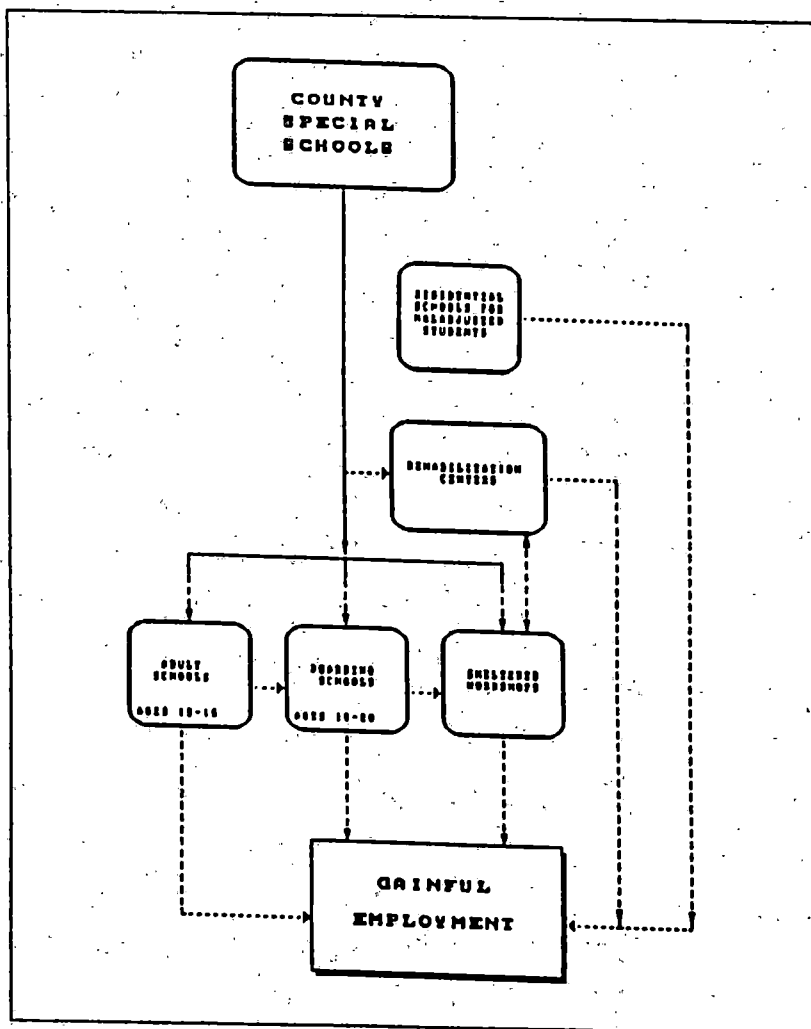
Students in the High Production Workshops generally remain in the program for a 1-3 year period. Many of these students enroll in courses provided by nearby Folk High Schools (described below). Persons leaving the High Production Workshops enroll in Production School or Vocational School Programs. Many are referred to Rehabilitation Centers and a significant number enter gainful employment directly.

### **Low Production Workshops**

Low Production Sheltered Workshops offer both day care and work experience programs. Most of the students enrolling in Low Production Workshops come from the County Special Schools.

The day care center program within the workshop concentrates on social skills development and domestic self-help skills. The work activity program involves the production of a wide range of goods, most of which are purchased by public agencies and private agencies which have commissioned them. Students can select those work activity roles which most interest them.

Staff of the Low Production Workshops include social workers, skilled work instructors and special education teachers. Most students in the Low Production Workshops remain there for the balance of their working lives. None is required to work and all receive a relatively generous pension and health care benefit package. Students who



**Figure 19 - Interrelationship of Sheltered Path Components**

show promise in the Low Production Workshops generally transfer to a High Production Workshop (discussed above).

### Rehabilitation Centers

County operated Rehabilitation Centers provide a special eight weeks program for persons with disabilities who range in age from 17-52. Most students attending Rehabilitation Center programs are in their twenties and apply for entry into the program after a serious physical illness or injury has occurred. Many of the persons enrolling in the Rehabilitation Center program are referred by Kurators from Folkeskoles or by County Special School Programs. A significant number of additional students are referred by High Production Sheltered Workshops.

At the Rehabilitation Center, students are assessed as to their present ability to participate in gainful employment. In practice, about 10% are determined to be employable after short-term rehabilitation services are provided. Those determined to have more serious barriers to employability are referred to Sheltered Workshops or are recommended for a pension. The centers thus serve a two-directional screening and placement function: students moving from school to either gainful employment or additional work training and young persons moving from High Production Sheltered Workshops to gainful employment. In placing persons with disabilities in gainful employment, Rehabilitation Centers work closely with County Employment Agencies in identifying potential jobs and providing initial job support services. A chart showing the interrelationships among Sheltered Path components is presented in Figure 19.

### THE ADULT PATH

Historically, Denmark has been committed to an extensive program of adult and "leisure-time" education. These education programs are organized and operated by a variety of private non-profit organizations and public authorities. In addition to the Youth Schools described above, the Adult Path includes Folk High Schools, Evening Schools, Special High Schools, Labor Market Courses and Special

Remedial Instruction Programs for disabled adults.

### **Folk High Schools and Evening Schools**

Folk High Schools and Evening Schools offer instruction for both disabled and non-disabled adults in five main subject areas: (1) academic subjects; (2) foreign languages; (3) crafts; (4) social subjects; and (5) cultural subjects. Academic instruction is targeted on Folkeskole and HF examination subjects (discussed above) creating an opportunity for disabled young adults to complete a Folkeskole education or to qualify for higher education.

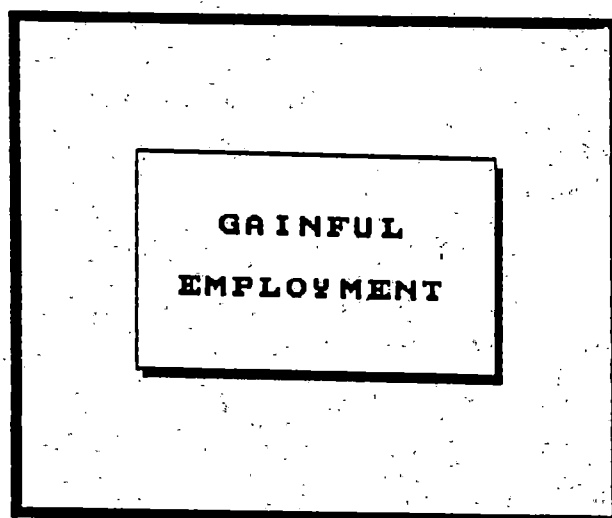
### **Special High Schools**

Special High Schools for mentally retarded adults are operated in several Danish municipalities. These schools offer an intensive one year course designed to develop autonomy and positive self-concept for severely retarded students who have IQs over 20 and have been out of school at least two years. Most students are in their twenties and come from Sheltered Workshops, Special Boarding Schools and Special Adult Schools. Specific instruction is provided in problem solving, the legal rights of disabled persons, how to find sheltered work, what to do with free time and other practical topics. Discussion groups are used extensively to encourage students to express and understand their feelings. While the program is limited to one year, students who need further help can re-enroll in the program after a 3 year hiatus.

### **Labor Market Courses and Special Remedial Programs**

Labor Market Courses are provided by county and municipal authorities for both disabled and non-disabled adults interested in both skilled and unskilled work. By law, Special Remedial Instruction Programs must be provided by counties for adults with disabilities. These programs provide special instruction in very small classes (e.g., 4 students) or on an individual basis in reading, mathematics and

other basic subjects. In addition, social and domestic skill instruction is provided for adults with disabilities with no interest in entering gainful employment.



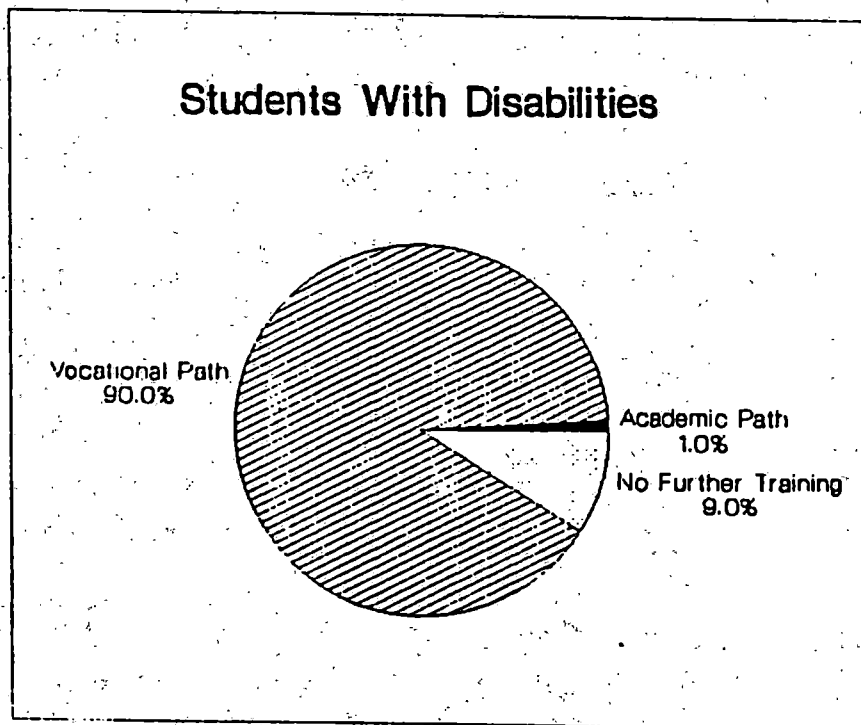
## **CHAPTER VI – OUTCOMES**

The Danish Ministry of Education has collected information regarding the effectiveness of the overall Upper Secondary system (including the Kurator contribution) for over 15 years.

### **FOLKESKOLE OUTCOMES**

Approximately 10% of all students completing the mandatory Folkeskole period (i.e., age 16) leave the Folkeskole and do not pursue any upper secondary path to gainful employment.

A significant percentage of these "drop-outs", however, reenter the system a few years later through the Adult Path. Of the remaining 90% of Folkeskolegraduates, approximately 40% initially pursue the Academic path and 50% initially pursue the Vocational Path (see Figure 20).



**Figure 20 – Folkeskole Graduates**

## ***From School to Working Life in Denmark***

During the first three years following Folkeskole graduation, approximately 25% of those students pursuing the Academic Path (i.e., a Gymnasium or HF Course program) shift to the Vocational Path. The remaining 75% (30% of total Folkeskole graduates) follow the Academic Path into higher education institutions and on to gainful employment. Fewer than 1% of students with disabilities graduating from Danish Folkeskoles elect to enter the Academic Path. In contrast, over 90% of these Folkeskole graduates with disabilities elect to pursue the Vocational Path and fewer than 9% of these students elect not to immediately pursue any upper secondary path (see Figure 19). Many of these young persons with disabilities subsequently elect to pursue the Adult Path. Virtually all graduates of the County Special Schools (all of whom are persons with moderate or severe disabilities) elect to enter the upper secondary Sheltered Path.

The outcome of Folkeskole for young persons with disabilities in Denmark differs sharply from secondary school outcomes for students with disabilities in the United States. Current data suggests that in the U.S. fewer than 20% of disabled students of secondary school age pursue any type of post-secondary educational program.

### **EMPLOYMENT OUTCOMES**

In Denmark, over 80% of all Folkeskole graduates who choose to pursue the Vocational Path (over 50% of all Folkeskole graduates), achieve gainful employment upon completion of the overall program. Most of the remaining 20% are well-qualified for competitive employment but are unable to find it due to current contractions in the Danish labor force. The general unemployment rate in Denmark over the last ten years has fluctuated between 15 and 20% of the potential labor force.

For Folkeskole graduates with disabilities, the combination of the Kurator approach and the flexibility of upper secondary vocational options has produced impressive outcomes in terms of competitive employment. Among Folkeskole graduates with disabilities pursuing the Vocational Path, over 75% (65% of all

## *From School to Working Life in Denmark*

Folkeskole graduates with disabilities) ultimately achieve gainful, competitive employment through the system (see Figure 21). Most of the remaining 25% of these young persons with disabilities could successfully achieve gainful employment but for the contractions in the Danish labor force (described above).

Virtually all graduates of the County Special Schools (all of whom are persons with moderate or severe disabilities) fare less well in terms of gainful employment through the Sheltered Path. Of the 8% of all Folkeskole-age young persons graduating from the County Special Schools only approximately 10% reach competitive employment, chiefly through the Special Boarding Schools,

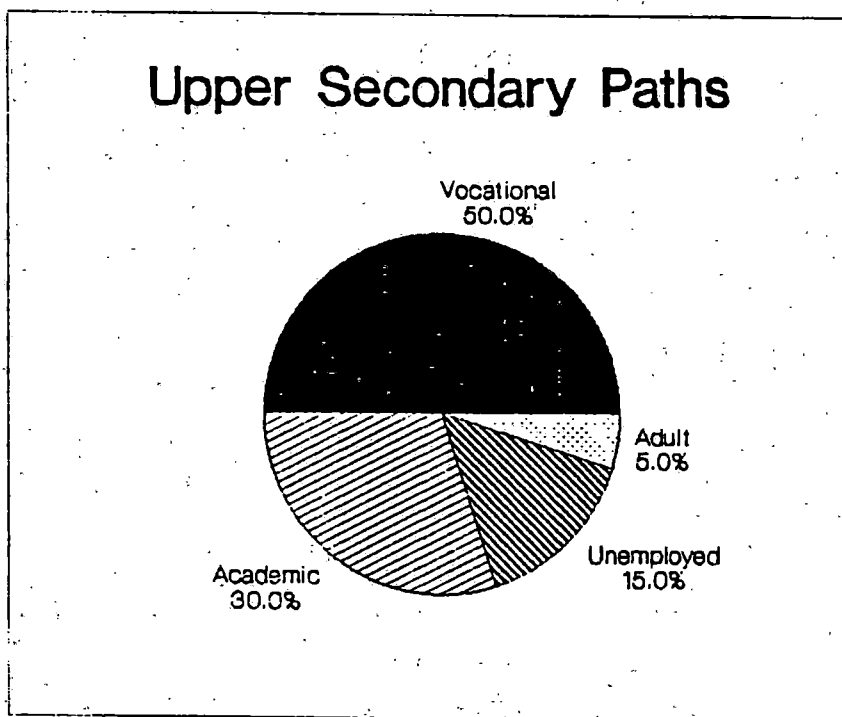


Figure 21 - Employment Outcomes For All Students

High Production Workshops and Rehabilitation Centers. The balance of students in the Sheltered Path do, however, reach sheltered employment, generally in the Low Production Workshops. Many of the higher functioning young persons with disabilities in the Sheltered Path could successfully compete for competitive employment if the overall demand for labor were to increase.

**ANALYSIS OF SUBPATHS**

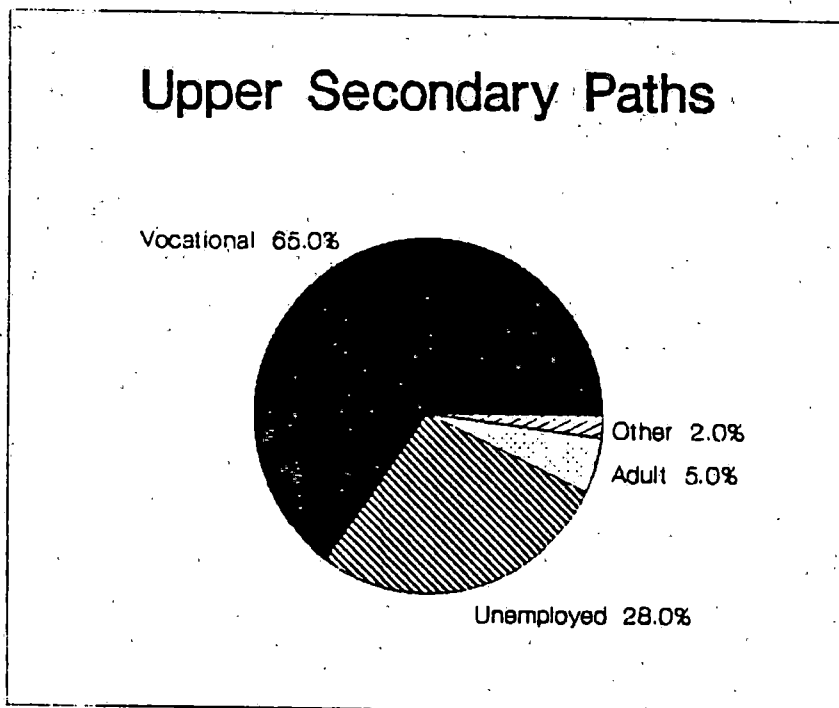
The complexity of the Danish upper secondary Vocational Path allows for numerous combinations of component programs (e.g., Continuation School to Production School, Production School to Vocational School). As a result, it is difficult to obtain information on the precise combination and sequence of components which appear to be most successful in terms of gainful employment for young persons with disabilities. However, interesting information is available about the "last step" success rate of two of the most important components of the Vocational Path.

The success rate (in terms of immediate gainful employment after completion of the component program) for all students completing Vocational School programs is extraordinarily high (averaging over 85%),

in light of the relative difficulty in finding jobs in the Danish economy. This success rate fails, however, to take into account the current "drop-out" rate for Vocational Schools which averages over 30% of those who initially enroll. Students enrolled in

Production Schools (both disabled and

non-disabled) have also had unusual success in finding gainful employment upon completion of that component of the Vocational Path. While outcomes vary from



**Figure 22 - Employment Outcomes For Persons With Disabilities**

### *From School to Working Life in Denmark*

school to school, many schools report a success rate of over 80%; i.e., students who have found work when leaving the school. On the average, approximately 65% of Production School graduates are able to find employment soon after graduation. Occupational counselors at the employment agency, the social worker and the Kurator assist students in attaining gainful employment after completion of the Production School program.

A substantial number of the remaining graduates of Production Schools continue in further training (e.g., Apprenticeship Training or Vocational Schools) components which, in turn, have very high success in producing immediate gainful employment after completion.

Many of the young persons within the Sheltered Path who are considered the best candidates for gainful employment enroll in the Special Boarding Schools after completing the County Special School program. Special Boarding School staff are frequently involved in trying to ensure that graduating students leave for some kind of training or employment program and a definite place to live. A significant number of Special Boarding School graduates subsequently enroll in Production Schools and thus enter the Upper Secondary Vocational Path.

In Denmark, few if any supported employment programs have yet been developed. Based on the current education and training provided through the Sheltered Path, it would appear that a very high percentage of young persons with disabilities now in sheltered employment could readily participate in supported employment programs were they to be introduced. However, today most of these young persons remain indefinitely in the Sheltered Workshop program.



## **CHAPTER VII – TRANSITION IN AMERICA: PROGRAM IMPLICATIONS**

Having reviewed the basic elements of the Danish Transition Approach, the question logically arises as to implications for education, employment and human service programs in the United States. In this chapter, the current ineffectiveness of American transition efforts targeted on children and young adults with disabilities is assessed and then analyzed in terms of contributing structural and programmatic factors. Following this analysis, the elements of the Danish Transition Approach which might respond most directly to these identified weaknesses are summarized and the potential benefits of replicating or adapting the elements for use in American programs is briefly discussed.

### **"TRANSITION" IN AMERICA**

In remarks on the signing of a 1983 proclamation establishing the National Decade of Disabled Persons, former President Ronald Reagan expressed concern about the negative consequences for persons with disabilities of the patchwork nature of Federal disability policies and programs and the absence of effective program integration and coordination. The President also stressed the importance of "returning to our traditional values of self-reliance, human dignity, and independence" if we are to "replace chaos with order in Federal programs." (Presidential Proclamation 5131).

*The Current Effectiveness of Transition*

The absence of effective coordination and integration among Federal disability programs has had a severe, adverse impact on the "transition" of school age clients from school to gainful employment.

Extraordinary developments in medical and vocational rehabilitation programs and in education, habilitation and employment transition strategies during the last decade have demonstrated convincingly that a very high percentage of persons with even the most severe disabilities can reach or be restored to work capacity sufficient to achieve gainful employment. One reason for the dramatic expansion of our awareness of the work potential of persons with severe disabilities has been the extraordinary success of "supported employment" and "independent living" strategies.

However, the National Council on the Handicapped reported in 1986 that only one-third of youths with disabilities leaving school graduate to a job or some form of advanced education and attributed this high rate of unemployment to "the lack of an effective transition process from school to work for youths with disabilities (Toward Independence, page 22). The council has directly attributed this outcome to the ineffectiveness of the current "transition" process to the "absence of a systematic vocational transition process for youths with disabilities" and recommends that Congress direct the Department of Education to require State and local education agencies to initiate and carry out the transition process, "including contacting the appropriate personnel in regular and special education, vocational education, vocational rehabilitation, community colleges, developmental disabilities and other agencies from whom each student receives services" (Id., pages 22-23).

The Disability Advisory Council, a commission established by Congress in 1986 to study and report to Congress on the current effectiveness of vocational rehabilitation, SSDI, SSI and related medical benefit programs in supporting transition from unemployment to work, addressed the issue of the coordination

## *From School to Working Life in Denmark*

of Federal disability programs serving school-age SSI beneficiaries with developmental disabilities in its 1988 Report to Congress:

"Many children with developmental disabilities now leaving secondary school have significantly benefited from the passage of Federal and State equal opportunity laws, but few make a successful transition from school to sustained, gainful employment. It is estimated that in 1986, over 90 percent of these special education graduates left school for one form of dependency or another". Report of the Disability Advisory Council, pages 21-22.

The Council attributes this and other major problems to what it describes as the "fractionalization" in the administration of Federal disability programs (Id., pages 16-17).

Other indicators of the severity of current program fragmentation reported by the Disability Advisory Council include the fact that fewer than one-half of one percent of persons with disabilities receiving SSI and SSDI benefits leave the program each year because of transition to gainful employment.

### *Reasons for the Ineffectiveness of Transition Efforts*

In a February 1986 Report to the President, Toward Independence, the National Council reported that "disabled people around the country declared that many programs do not mesh well with other available services, and that too often the service delivery system exhibits gaps, inconsistencies and inequities" (Page 58). In 1988, in its second Report to the President, On the Threshold of Independence, the same council observed that "Many instances of gaps in services, as well as duplicative services, are evident across the country" and declared that "Coordinated efforts could resolve some of these problems" (Page 89).

The Disability Advisory Council recommended to Congress in March 1988 that significant changes be made in several Federal disability programs in order to ensure the effective coordination of services to these young persons and their families prior to, during and after transition from school to gainful employment (Chapter 2, page 24).

## *From School to Working Life in Denmark*

These and other studies conducted during the last decade have demonstrated that services needed by young persons with disabilities and their families to prepare for, support and sustain transition from school to work were frequently unavailable for three principal reasons. First, young persons and their families did not have access to an individual who was in any real sense either accountable for identifying the range of services needed by the individual or the family or given the cross-cutting responsibility and authority to oversee the provision of appropriate services.

Second, the current structure of disability programs works against the "empowerment" of young persons with disabilities and their families to access services directly. The current lack of involvement of clients in agency planning, decision-making and "quality control" activities directly impedes the effective coordination and integration of services and benefits at the client service level. Each of the traditional values referred to by President Reagan is abandoned when government programs organize and provide services to individuals in the absence of collaboration, cooperation or even consultation. Indeed, the lack of client involvement in decision-making is directly inimical to an underlying service goal (i.e., adult status, self-advocacy).

Third, the dispersion of management responsibility and authority for program implementation among a variety of State and local agencies has created what one analyst has termed a "loose aggregation of independently functioning units". Noble, J. & Conley, R., "Severely handicapped Americans: Victims of outmoded policies," in Handbook of Rehabilitation Medicine, Goodgold, J. (Ed.), St. Louis (1988). This dispersion has also led to the extreme compartmentalization of disability programs. For example, the current lack of coordination among the three most important Federal disability "service" programs for school age clients (i.e., the Education of the Handicapped Act (P.L. 94-142), the Federal/State vocational rehabilitation programs, and the Developmental Disabilities program) is exemplified by basic aspects of the current structure and operations of each of these programs.

## ***From School to Working Life in Denmark***

For example, P.L. 94-142 makes no direct reference to transition from school to work and adult life and only a few states have passed legislation during the past decade designed to create comprehensive and coordinated (among the variety of responsible agencies) "transition" services. The Developmentally Disabled Assistance and Bill of Rights Act established a nationwide program of assistance to States in developing comprehensive plans for meeting the needs of developmentally disabled persons within the State but left control over the financial resources to implement such plans with the State Medicaid agency not the State Mental Retardation agency. While Congress created a priority within the Federal/State vocational rehabilitation system for serving persons with severe disabilities, the basic eligibility criteria for vocational rehabilitation services (i.e., the ability of individuals to achieve gainful employment as a result of the provision of vocational rehabilitation services) continues to inherently disadvantage those clients who have been least well-served by the public schools (i.e., those in need of long-term services who are least likely to be quickly "rehabilitated").

In sum, four specific deficiencies in program coordination appear to have directly and significantly contributed to the ineffectiveness of current Federal disability programs targeted on the "transition" population:

- (1) The absence of comprehensive individual transition planning (both during school years and afterward) and the resulting reliance on fragmented, unfocused planning procedures.
- (2) Inadequate secondary school preparation, illustrated chiefly by the failure to establish post-school goals which form the basis for the establishment of both annual goals and short-term instructional objectives within the IEP.
- (3) The abrupt discontinuation of the P.L. 94-142 entitlement approach at a crucial developmental period and the resulting, "selective" nature of vocational rehabilitation and developmental disabilities services.
- (4) The absence of parent and family involvement and the failure to incorporate (and to support the development of the skills necessary to permit) effective self-advocacy and self-determination in the identification of work and community life goals, the determination of service strategies and the selection of service providers.

**KEY ELEMENTS OF THE DANISH TRANSITION APPROACH**

The key elements of the Danish Transition Approach which appear to respond most directly to the problems (discussed above) which have been identified as contributing to the general ineffectiveness of American transition programs can be grouped into three principal areas:

- (1) Innovative secondary education strategies, including an array of "upper secondary" vocational options;
- (2) Flexible and integrated "adult education" approaches which allow for re-entry into the basic academic and vocational paths for young adults who have previously "dropped out"; and
- (3) On-going case advocacy and service coordination approaches that permit persons with disabilities and their families to "choose" from among a variety of career goals and strategies.

Each of these areas is discussed separately below .

**Innovative Secondary Education Strategies**

Students between the ages of 16 and 18 (both with and without disabilities) in the United States currently enjoy a very limited range of public educational alternatives. In general, most American school systems have adopted the Comprehensive High School approach which combines both upper secondary academic and vocational educational options within a single facility.

Some school districts operate separate, advanced academic high schools (e.g., Bronx High School of Science) for a very small percentage of the secondary school population and others have created separate secondary vocational schools, most of which, in fact, provide a primarily pre-vocational rather than vocational curriculum. A few urban school districts have also developed limited and usually segregated (by "behavioral" category) "alternative" secondary schools. At best, "choice" for young persons and their families of free (i.e., publicly financed) upper secondary education programs in this country is limited to a narrow range of

## *From School to Working Life in Denmark*

publicly operated secondary schools.

Denmark has chosen a dramatically different philosophical and structural approach to upper secondary education. The hallmarks of this approach include:

(1) The termination of the comprehensive secondary school approach (i.e., the Folkeskole) at age 16, the upper age limit for compulsory school attendance;

(2) The operation of a continuum of integrated school/job site education alternatives for all Folkeskole students, including work experience, work placement and trial work strategies;

(3) The creation and public support of a broad range of integrated "vocational" upper secondary alternatives, some publicly and some privately administered, which provide day and residential instruction in an enormous array of vocational areas;

(4) The active involvement of private employers in both lower and upper secondary vocational education programs, along a continuum of direct employer involvement which ranges from incidental (career education) to evaluative (work placement) to intensive (apprenticeship); and

(5) The flexible interrelationship of the various vocational and academic options so that an upper secondary program can be tailored to the interests, needs, capabilities and developmental profiles of individual students (both disabled and non-disabled).

The advantages of the Danish approach are manifest, particularly for adolescents with learning difficulties, behavioral problems and disabilities. Secondary programs can be individualized to meet the unique developmental patterns of each child. Competition among upper secondary service providers results in an enormous choice of educational strategies (e.g., therapeutic/residential, community-based/work intensive), settings (e.g., job-site, community residence, school building) and structures (e.g., 8 week intensive, 5 year academic/vocational). Public financing and support models (including student stipends) make these "choices" real for children from even the most economically disadvantaged backgrounds.

**Flexible Adult Education Systems**

Unlike some European countries, the Danish education system is designed to permit students to re-enter or change education/employment paths at any time. Adult educational alternatives (e.g., Folk High Schools, special remedial instruction programs) encourage persons of all ages to reenter the system. Young persons who opt out of upper secondary academic programs for vocational alternatives in their teens, can return through a variety of paths and pursue the academic and higher education alternatives in their late twenties or early thirties. Similarly, young persons choosing short-term but lower-skill vocational alternatives can work for several years and then return to Vocational Schools to pursue much higher paid vocational specialties in related career areas (e.g., semi-skilled labor to electro-mechanic engineering).

Unlike the traditionally limited and literacy-oriented American pattern of public adult education, the Danish approach really represents an indefinite extension of the flexible model of "free" upper secondary alternatives which begins at age 16. Within this structure, it is never too late to expand educational and career opportunities, even for those whose development follows a different course and whose maturity occurs only after hard experience.

**Ongoing Case Advocacy and Service Coordination**

Ongoing case advocacy and service coordination for children with disabilities and their families is the central responsibility of several skilled professionals who combine to provide service continuity from birth to old age in a manner unparalleled in the United States (see Figure 23).

Chapter IV describes in detail the Kurator approach to case advocacy and service coordination during the final years of Folkeskole and the initial years of upper secondary education. The most important philosophical and structural

features of this approach, include:

- (1) the use of skilled, and experienced teachers (rather than social workers or administrators) as Kurators;
- (2) the insistence that Kurators remain, first and foremost, teachers and that, at least, 50% of their weekly hours be dedicated to Folkeskole teaching;
- (3) the framing of career decisions for students and families and the related concept that the Kurator's role includes "teaching" self-advocacy and decisionmaking to students with disabilities and their families (i.e., "empowering" rather than "directing"); and
- (4) the "advocacy" rather than "management" orientation of Kurators, within the Folkeskole and the community.

With all the attention which has been properly devoted to the Kurator system, it is extremely important to recognize that the Danish Transition Approach utilizes several other professionals in the role of ongoing advocate and coordinator. These professionals include the Class Teacher (who "advocates" and coordinates throughout the entire period of Folkeskole enrollment), the Youth Advisor (who "advocates" and coordinates for youth out of school and, perhaps most

### Advocates and Coordinators

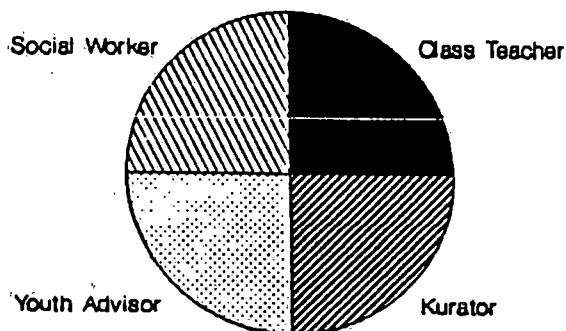


Figure 23 - Advocates and Coordinators

## *From School to Working Life in Denmark*

importantly, the Social Worker (who plays a sometimes life-long "advocacy" and coordination role). This crucially important role is profiled in Chapter II.

### CONCLUSION

The list of problems (described in detail in Chapter I), which gave rise in Denmark to the design and development of the innovative transition approaches which are described in this profile, bears a striking similarity to the problems currently plaguing the American "transition" experience (described earlier in this chapter). Within Denmark an innovative system has been developed to maximize the potential of young adults to successfully transition from school to adult and working life. Many of the features of this system could and should be replicated or adapted for use in American "transition" programs.

## **GLOSSARY**

### **Academic Path**

The Academic Path is an upper secondary continuum which consists of Gymnasia and HF Courses designed to permit entry into the higher education system which is pursued by approximately 40% of all Folkeskole graduates.

### **Adult Path**

The Adult Path is an upper secondary continuum which consists of Youth Schools, Folk High Schools, Evening Schools, Labor Market Courses, Special Remedial Instruction Programs for disabled adults and Special High Schools. Because young persons with disabilities may continue to receive education and training for several years beyond completion of the basic education program, young persons with disabilities pursuing either the academic or vocational path may also utilize the adult system.

### **Adult Schools**

Adult Schools provide education to young persons and adults with moderate and severe disabilities from age 14 on for an indefinite period of time. Adult Schools are operated by counties and enroll students who previously attended special classes within Folkeskoles or Special Schools. Older persons with disabilities are also referred to the Adult Schools by the Danish Social Services System. Students are generally referred to the

Adult Schools when all other education strategies have failed.

### **Apprenticeship Training**

Apprenticeship Training in Denmark takes from two to four years and may be initiated after nine years of basic education. Training takes place alternately at a Technical School or other vocationally oriented school and under the supervision of a master craftsman at the workplace. Young persons entering Apprenticeship Training elect to pursue one of the eight vocational fields comprised of over 130 different trades. Many of the specific occupational categories available within the Apprenticeship Training program are not available within the Vocational School program. Apprenticeship Training terminates with the award of a Journeyman's Certificate, which gives the status of skilled laborer. The certificate may also act as a basis for further education and training, for example in architecture or engineering.

### **Career Guidance Staff**

Each student attending a Folkeskole in grades 7 through 10 may receive assistance from one or more Career Guidance Staff, including a Folkeskole Guidance Teacher, a Youth Advisor and a Kurator. Career Guidance includes the planning and coordination of the overall program of vocational orientation and training. Career Guidance Courses

## ***From School To Working Life in Denmark***

Introductory career guidance courses focused on an introduction to the labor market and to a wide variety of occupational areas are provided two hours per week to all children enrolled in the 8th and 9th grades of Danish Folkeskoles. The content of 8th grade courses includes (1) Work Functions; (2) Co-operation and Management; (3) Economics; (4) Training Facilities; (5) Environmental Factors; and (6) Enterprise and Society. In the 9th grade additional courses are provided in Conditions of Employment and Management and Labor.

### **Children Receiving Special Education Services**

Special education is provided to children in each of the following categories: (1) children who have a need for a special educational method because of specific physical disabilities; (2) children who need a special educational content because of general difficulties in learning; (3) children who need a special educational structure because of social adjustment difficulties; and (4) children who need individualized and intensive special support because of specific difficulties (e.g., mental retardation, learning disabilities).

### **Class Teacher**

Within the Folkeskole, the Class Teacher (usually the Danish Teacher) provides instruction for part of the school day to the same class of pupils throughout their entire 9 or 10 year Folkeskole enrollment and, as a result, often develops a thorough understanding of the child and a

close relationship with the child's parents.

### **Commercial School**

Commercial Schools offer vocational instruction to students leaving grade 9 or 10 of the Folkeskole in a wide variety of fields outside the eight vocational areas addressed by Vocational Schools. Commercial Schools are operated by private organizations and generally provide instruction over a 2-3 year period.

### **Continuation Schools**

Continuation Schools provide an intensive, one or two-year boarding school program for students completing their 9th year of Folkeskole education. The program stresses both basic education and vocational training. These schools offer the compulsory subjects necessary for students preparing for final Folkeskole examinations and award a Diploma. Approximately 200 Continuation Schools operate within Denmark, enrolling anywhere from 30-160 students.

### **County Employment Agency**

The County Employment Agency provides assistance to students with disabilities participating in both the Vocational and Sheltered Path systems who are seeking work placements or secure permanent employment. Young persons with disabilities who have a functional level of at least 55% of normal work capacity may also receive assistance from the County Employment Agency to acquire permanent employment.

## *From School To Working Life in Denmark*

County Employment Agencies provide assistance to young disabled persons with functional levels below 55% in obtaining sheltered work and, based on the work done, contribute at least 33 1/3% of the salary.

### **EFG Program**

[See Vocational School]

### **Evening Schools**

Evening Schools offer instruction for both disabled and non-disabled adults in five main subject areas: (1) academic subjects; (2) foreign languages; (3) crafts; (4) social subjects; and (5) cultural subjects. Academic instruction is targeted on Folkeskole and HF examination subjects.

### **Folkeskole**

A Folkeskole is a unitary (i.e., primary and lower secondary) and compulsory education program for children between the ages of 7 and 16 (grades 1-9) and an optional 10th grade program. Folkeskole instruction is provided in a large number of subjects, most of which (i.e., 15) are compulsory for all children. The average pupil/teacher ratio in the Folkeskole is 18 to 1.

### **Folk High Schools**

Folk High Schools offer instruction for both disabled and non-disabled adults in five main subject areas: (1) academic subjects; (2) foreign languages; (3) crafts; (4) social subjects; and (5) cultural subjects. Academic instruction is

targeted on Folkeskole and HF examination subjects.

### **Green Schools**

Green Schools are the county special schools for mentally retarded children which enroll a substantial percentage of all children with mental retardation. For example, virtually all children with Down Syndrome are enrolled in these schools. Children with severe autism are also placed in these schools.

### **Guidance Teacher**

The Guidance Teacher provides guidance to pupils in the 7th through 10th grades of the Folkeskole concerning choice of subjects at school, continuing education and occupational possibilities. For non-disabled students, guidance teachers arrange for work experiences and arrange for guest speakers from different occupations and training institutions.

### **HF Courses**

An HF Course is an alternative way of gaining qualifications necessary for higher and further education which requires a minimum of two years and can be extended over a longer period of time. HF Courses, thus, can be taken at night school or at a Folk High School. The only entry requirement for an HF Course is the completion of ten years of basic education or a few years of work experience or training.

### **High Production Workshops**

High Production Workshops are

## *From School To Working Life in Denmark*

sheltered workshops which provide intensive work training programs which concentrate on the development of both general work and specific job skills. Students entering High Production Sheltered Workshops primarily come from Special Boarding Schools, Special Schools and Rehabilitation Centers. High Production Workshops are also used as work placement sites for students unable to function successfully in ordinary employment.

### **Kurator**

A Kurator is a Folkeskole teacher who is employed by the local school authority to provide a variety of support services to young persons with disabilities (from age 13 on) and their families and is allowed a reduction in teaching hours commensurate with his or her caseload of students with disabilities. On the average, Kurators are assigned a caseload of approximately 60 students, 30 of whom are enrolled in a Folkeskole and 30 of whom are out of school or in the Vocational or Sheltered Paths. The primary caseload of students with disabilities assigned to a Kurator consists of students in special classes in a Folkeskole which are organized for students with general difficulties in learning. Among other things, the Kurator gives educational and vocational orientation to disabled Folkeskole students and arranges for occupational and job practice for the same students.

### **Labor Market Courses**

Labor Market Courses are provided by county and municipal

authorities for both disabled and non-disabled adults interested in both skilled and unskilled work.

### **Low Production Workshops**

Low Production Workshops are sheltered workshops which offer both day care and work experience programs. Most of the students enrolling in Low Production Workshops come from the Special Schools. The day care center program within the workshop concentrates on social skills development and domestic self-help skills. The work activity program involves the production of a wide range of goods, most of which are purchased by public agencies and private agencies which have commissioned them.

### **Municipal Youth Employment Program**

By law, local authorities must establish and operate a Municipal Youth Employment Program which guarantees a year of employment to every young person between the ages of 18-20 (including young persons with disabilities) who is not enrolled in a school program. The Municipal Youth Employment Program is divided into three sections. Section 1 is an introductory 10 week session designed to provide a general orientation within the world of work. Section 2 of the program is a twelve week intensive educational and vocational training activity. Section 3 of the Municipal Youth Employment Program is a 24 week work experience activity in which participants receive on-the-job training while carrying out basic job responsibilities at a regular work site. Participants in

## *From School To Working Life in Denmark*

Section 1 and 2 programs receive a small stipend; Section 3 participants are paid a regular salary for the work performed.

### **Normalization**

The principle of "normalization" dictates that persons with disabilities be on an equal footing with all other Danish citizens with respect to law, government agencies and other political, social and economic institutions.

### **Pre-Vocational Training Centers**

The Ministry of Labor operates 48 pre-vocational training centers which offer a special pre-vocational curriculum appropriate for students with severe disabilities. These courses range in duration from a few weeks to several months.

### **Production School**

Production Schools are small (50-100 students) public and privately operated upper secondary schools which provide vocational training, develop motivation and restore self-confidence in students, between the ages of 16 and 19, who were not making progress in the normal academic and vocational educational programs (including many students with disabilities). Each Production School concentrates on one or more specialized vocational training and work programs and combines practical training with academic instruction.

### **Rehabilitation Centers**

Rehabilitation Centers provide a special eight weeks program for

persons with disabilities who range in age from 17-52. Persons enrolling in the Rehabilitation Center program are referred by Kurators from Folkeskole or Special School Programs and by High Production Sheltered Workshops. Rehabilitation Centers assess these "clients" in order to determine their present ability to participate in gainful employment.

### **School Psychological Team**

A school psychological team provides services to Folkeskole students enrolled in one or more schools. The team is composed of one supervisory psychologist (who is always a teacher with a degree in psychology), a clinical psychologist, a pedagogical counselor (a person specially trained regarding the education of students with disabilities), a social worker and a Kurator. The basic functions of the team as it relates to children with disabilities include special pedagogical assistance to infants and their families, direct pedagogical support of both special and regular class teachers, pedagogical and psychological counseling of children and parents, research and in-service training of school staff.

### **Sheltered Path**

The Sheltered Path is a continuum of separate upper secondary programs for those students reaching age 16 who are enrolled in the special school system operated by county authorities. The stated goal of the Sheltered Path is gainful employment but, in practice, its primary function is to provide productive activity. The Sheltered Path currently consists of

## *From School To Working Life in Denmark*

Sheltered Workshops, Adult Schools, Special Boarding Schools, Special High Schools and Rehabilitation Centers.

### **Sheltered Workshops**

Two types of Sheltered Workshops are operated throughout Denmark by County agencies: High Production Workshops and Low Production Workshops. High Production Workshops represent approximately 20% of the total number of Sheltered Workshops. Students are encouraged to attend Sheltered Workshops as close to home as possible.

### **Special Boarding Schools**

Special Boarding Schools provide an intensive, two year residential program for young persons with severe disabilities, 18 years of age or older, most of whom come from Special Schools and have general difficulties in learning. These schools offer a two-year, coeducational program which includes both academic instruction and practical work experience outside of the school. Enrollments in the Special Boarding Schools vary, but average approximately 25.

### **Special High Schools**

Special High Schools for mentally retarded adults, operated in several Danish municipalities, offer an intensive one-year course designed to develop autonomy and positive self-concept for severely retarded students who have IQs over 20 and have been out of school at least two years. Most students are in

their twenties and come from Sheltered Workshops, Special Boarding Schools and Adult Schools.

### **Special Remedial Instruction**

Special Remedial Instruction Programs operated by counties for adults with disabilities provide special instruction in very small classes (e.g., 4 students) or on an individual basis in reading, mathematics and other basic subjects.

### **Special Schools**

Special Schools are separate, self-contained schools operated by county authorities for children with severe disabilities ages 6-18. The schools include separate schools for deaf children, physically handicapped children, psychotic children and mentally retarded children ("Green Schools"). A special short-term Special School program is also offered for blind children. Except for the Green Schools, Special Schools are 24 hour residential programs.

### **Special Workers Courses**

Special Workers Courses are intensive vocational training courses emphasizing direct work experience which are offered by the Ministry of Labor to young persons below the age of 18, including a significant number of young persons with disabilities who have previously attended Folkeskoles and either Continuation or Production Schools. At present, approximately 30 different courses are offered and each may be taken independently or as part of a sequence leading to specific job mastery.

## *From School To Working Life in Denmark*

### **Technical School**

Technical Schools offer vocational instruction to students leaving grade 9 or 10 of the Folkeskole in a wide variety of fields outside the eight vocational areas addressed by Vocational Schools. Commercial Schools are operated by private organizations and generally provide instruction over a 2-3 year period.

### **Vocational Path**

The Vocational Path is the upper secondary path pursued by over 90% of all Folkeskole graduates with disabilities. It has three basic components: (1) the Folkeskole component, including supplementary youth education programs; (2) a range of upper secondary vocational education and training options; and (3) special employment programs.

### **Vocational School**

Vocational Schools, which are operated by both public and private agencies, offer a 3-5 year program culminating in the award of a Diploma in one of eight major vocational areas. No special vocational programs are operated by Vocational Schools for students with disabilities. The first (academic) year of the program is provided by a Technical, Commercial or other vocationally-oriented school and is devoted to core academic subjects, practical training in school workshops and vocational theory. The remaining years are concentrated on intensive vocational study provided at both the workplace

and school.

### **Work Experience Program**

Work Experience Programs provide 1-2 weeks of actual work at several community sites for students during the 9th grade of Folkeskole. These programs are short introductory "courses" intended to provide a practical introduction to the labor market and the basis for subsequent employment. Work experience programs for students with disabilities are usually arranged by the Kurator after a discussion of vocational interests and skills.

### **Work Placement Program**

In the 10th grade students are given the option of participating in a Work Placement Program which offers a much more extended opportunity to gain work experience. Students choosing to participate in the Work Placement Program devote a significant portion of the 10th grade to on-site work activity.

### **Youth Advisor**

The Youth Advisor provides assistance concerning training and work possibilities to all students and to Folkeskole graduates or drop-outs for up to two years after they have left school and at least until they are 19 years old. The central goal of the Youth Advisor is to ease transition from school to further education and work. The Youth Advisor may, in certain instances, also be a Kurator.

### **Youth Schools**

Youth Schools offer an annual

## *From School To Working Life in Denmark*

program of free activities (including both leisure and academic support courses) for all young people in a the municipality between 14 and 18. Attendance is voluntary and courses are generally offered after Folkeskole hours and on weekends. Generally, Youth School students start with a four week Level I course during grades 8 to 10, mainly in practical subjects which are best suited for youngsters with general difficulties in learning. In Level II courses, students delve further into several of the vocational areas addressed by Level I for from 3 to 4 weeks. Level III courses are mainly offered in the 10th grade to students who desire to embark on intensive training in a particular vocational field.

### **Youth Team**

A Youth Team, composed of representatives from the various guidance systems in the municipality (including the school-based, Career Guidance staff, youth counselors, Kurators and representatives from the social services agencies and the employment agencies), is appointed by the local Youth Council to oversee all youth employment activities within a municipality.

# From School To Working Life in Denmark

## INDEX

Academic Instruction, . . . . .	58, 77, 79	curriculum . . . . .	44, 76
Academic Path . . . . .	36, 75	Kurator liaison . . . . .	31
Academic Subjects . . . . .	58, 77	Kurator recommendation . . . . .	29
Adjusted course of study . . . . .	3	enrollment . . . . .	44, 76
Adult and Working Life . . . . .	1, 74	link to Special Workers Courses . . . . .	48, 80
Adult Path . . . . .	57, 75	Cooperative Arrangements . . . . .	45, 79
components . . . . .	57, 59, 75	Counties . . . . .	28
Adult Schools . . . . .	75	County Employment Agency . . . . .	76
Adult Status . . . . .	53, 80	County Employment Program . . . . .	49
Age . . . . .	7	County Special School . . . . .	19
Apprenticeship Program . . . . .		Crafts . . . . .	58, 77
vocational areas . . . . .	43, 47, 75	Cultural Subjects . . . . .	58, 77
Apprenticeship Training . . . . .	48, 75	Curriculum . . . . .	11
administration . . . . .	11		
Assessment . . . . .	42	Danish Transition Approach . . . . .	
Attendance . . . . .	41, 81	key elements . . . . .	69
Attendant Care . . . . .	7	key elements for replication and	
Autism . . . . .	52, 77	adaptation in U.S. . . . .	70
Autonomy . . . . .	58, 80	Day Care . . . . .	56, 78
		Deaf . . . . .	52, 80
Basic Education Program . . . . .	36, 75	Decentralization . . . . .	8
Basic Secondary Exam . . . . .	47, 76, 80	Denmark . . . . .	
Behavior Difficulties . . . . .	16, 17, 76	adult services laws . . . . .	58, 78, 80
Blind . . . . .	52	apprenticeship laws . . . . .	48, 75
Brain Damaged Children . . . . .	19	compulsory school attendance . . . . .	15, 35, 75
		decentralization . . . . .	6, 9
Career Guidance Classes . . . . .	37, 76	disability employment policy . . . . .	24
Career Guidance Team . . . . .	21, 29, 75	education laws . . . . .	18, 47, 81
composition . . . . .	24, 75	educational program components . . . . .	15
relationship to Youth Team . . . . .	27, 81	health programs . . . . .	8, 78
Caseload . . . . .	20, 78	public financing . . . . .	12
Children Receiving Special		social policy . . . . .	8, 9, 78
Education . . . . .	76	social service guarantee . . . . .	7
Class Teacher . . . . .	16, 21, 28, 76	social service reforms . . . . .	6
with Kurator . . . . .	23, 25, 32, 76	social service system . . . . .	29
responsibilities . . . . .	23, 76	special education laws . . . . .	52
Classroom Groups . . . . .	42, 53	the Social Assistance Act . . . . .	7
regular . . . . .	9	vocational education policy . . . . .	35
Clinical Psychologist . . . . .	21, 79	youth employment law . . . . .	49, 78
Commercial School . . . . .	47, 76, 80	Disabilities . . . . .	8, 78
Community life . . . . .	1, 20, 78	Down Syndrome . . . . .	52, 77
Continuation Schools . . . . .	76	Drop-outs . . . . .	26, 63, 81
administration . . . . .	11		

## *From School To Working Life in Denmark*

Economic Support . . . . .	29	for all students . . . . .	61
Educational Isolation . . . . .	19	for disabled students . . . . .	61
Educational Support . . . . .	7	Foreign Languages . . . . .	58, 77
EFG Program . . . . .	77	Gainful employment . . . . .	1, 20, 36, 78, 79
Elementary Schools . . . . .	15	Green Schools . . . . .	77
Employers		Guidance Teacher . . . . .	24, 75, 77
identification by Kurator . . . . .	31	guidance . . . . .	28
identification by other		responsibilities . . . . .	24, 77
employers . . . . .	31	Gymnasium . . . . .	36, 37
organizations . . . . .	39, 76	Health Agencies . . . . .	27, 81
relationship with Kurator . . . . .	25	relationship to Youth Teams . . . . .	27, 81
visits by kurators . . . . .	30	health care . . . . .	7, 56
work placement programs . . . . .	41	Hearing Impairment . . . . .	19
Employment Agencies . . . . .	25, 49, 76	HF Courses . . . . .	37, 77
links to Production Schools . . . . .	64	High Production Workshops . . . . .	77
relationship to Youth Teams . . . . .	27, 81	High Schools . . . . .	15
Employment Outcomes . . . . .	61	Higher Education . . . . .	35, 75
Employment Support Services . . . . .	7	Higher Preparatory Examination . . . . .	36
Evening Schools . . . . .	57, 75, 77	Home Environment . . . . .	22
Families . . . . .	1, 20, 21, 78	Housing Support . . . . .	8
counseling by Kurator . . . . .	23	In-service Training . . . . .	22, 79
home background . . . . .	16	Individualized Education . . . . .	58, 80
liaison with Kurator . . . . .	31	Individualized Support . . . . .	16, 76
permission to Kurator . . . . .	25	Instruction . . . . .	45, 79
relationship with Class		Instructional Day . . . . .	52
Teacher . . . . .	23, 76	Instructional Materials . . . . .	11
Financial Assistance . . . . .	7	Instructional Hours . . . . .	14
Folk High Schools . . . . .	37, 77	Integration . . . . .	8
Folkeskole . . . . .	15, 18, 23, 60, 75	Intelligence Problems . . . . .	17
"drop-out" . . . . .	27	Interagency service coordination . . . . .	2
academic path . . . . .	37, 77	Job Availability . . . . .	7
administration . . . . .	11	Job Opportunities . . . . .	25
class composition . . . . .	16, 77	Job Practice . . . . .	25
curriculum . . . . .	16, 30	Kurator . . . . .	1, 20, 78
entry into the Academic Path . . . . .	37, 77	as a member of School Psychological	
entry into Vocational Path . . . . .	37	Team . . . . .	22, 79
further education outcomes . . . . .	36, 75	as member of Career Guidance Team . . . . .	24
graduates . . . . .	31, 35, 37, 75, 80	as Youth Advisor . . . . .	26
graduation . . . . .	27, 29	assistance in finding employment . . . . .	64
placements within . . . . .	18, 19	assistance in obtaining	
school boards . . . . .	11	employment . . . . .	25
services for Folkeskole		attending meetings and	
students . . . . .	28, 78	conferences . . . . .	29
teachers . . . . .	20, 23, 78		
Teachers' Council . . . . .	11		
Folkeskole Graduates . . . . .	26, 81		
Folkeskole Outcomes . . . . .	60		

## *From School To Working Life in Denmark*

availability to students . . . . .	25
career guidance courses . . . . .	38
caseload . . . . .	20, 78
caseload assignment . . . . .	28, 78
coordination with Class Teacher . . . . .	23, 32, 76
coordination with Employment Agencies . . . . .	49, 76
coordination with Guidance Teacher . . . . .	28
coordination with social service agencies . . . . .	21
counseling activities . . . . .	22
discussions with parents . . . . .	32
educational and vocational orientation . . . . .	25, 30, 78
employment . . . . .	20, 78
enrollment in Special Boarding Schools . . . . .	53
entry into Vocational Path . . . . .	37
evaluation of Youth School performance . . . . .	42
familiarity with local community . . . . .	34
family liaison . . . . .	31
functions . . . . .	25
guidance activities . . . . .	29
identification of employers . . . . .	31
interagency relationships . . . . .	34
knowledge and experience . . . . .	34
knowledge of local community . . . . .	31
legislative basis for activities . . . . .	34
liaison between families and employers . . . . .	32
local plans . . . . .	21
on-the-job support . . . . .	25, 30, 31
ongoing relationship with students . . . . .	25
parental and home visits . . . . .	32
parental decision-making . . . . .	32
primary caseload . . . . .	28, 78
qualifications . . . . .	33
recommendations for economic and social support . . . . .	29
upper secondary	

programs . . . . .	29
referral to Production Schools . . . . .	44, 79
Rehabilitation Centers . . . . .	57, 79
Special Adult Schools . . . . .	53, 75
regular teaching responsibilities . . . . .	28, 78
relationship with Class Teacher with Continuation Schools . . . . .	31
with employers . . . . .	25
report of student progress . . . . .	29
request for assignment . . . . .	28
right to . . . . .	27
services . . . . .	21
services after Folkeskole . . . . .	28
special teaching responsibilities . . . . .	28
student information . . . . .	23
student profile reports . . . . .	31
student stipends . . . . .	41
students attending Continuation Schools . . . . .	44
students in regular classes . . . . .	28
students in special classes . . . . .	25, 28
students in special schools . . . . .	28
students out-of-school . . . . .	31
teaching activities . . . . .	30
teaching hours . . . . .	20, 78
time devoted to activities . . . . .	28, 78
training . . . . .	33
typical caseload demography . . . . .	28, 78
vocational support activities . . . . .	29
work experience activities . . . . .	25
work placement conditions . . . . .	41
work placement in Sheltered Workshops . . . . .	54, 77
work placement report . . . . .	31
work placements . . . . .	31
work related experience . . . . .	25, 78
Kurator's work placement report . . . . .	31
Labor Force Characteristics . . . . .	62
Labor Market . . . . .	38, 76
Labor Market Courses . . . . .	57, 75, 78
Learning Disabilities . . . . .	14, 16, 18, 76
Learning Problems . . . . .	17
Leisure Time . . . . .	22

## From School To Working Life in Denmark

Levels of Government . . . . .	10	Pension . . . . .	7, 56
Living Arrangements . . . . .	53	referral by Rehabilitation	
Low Production Workshops . . . . .	78	Centers . . . . .	57
Medical Assistance . . . . .	7	Persons eligible for services	
Mental Retardation . . . . .	16, 52, 76, 80	age . . . . .	27, 81
Middle Schools . . . . .	15	Physical Disabilities . . . . .	16-19, 76
Ministry of		Practical Training . . . . .	44, 79
Education . . . . .	5, 10, 44, 45, 52	PRAO . . . . .	3
Labor . . . . .	48, 80	Pre-School Services . . . . .	9, 17, 78
Social Affairs . . . . .	6, 10, 14, 51	Pre-Vocational Training Courses . . . . .	37, 78
Moderate Disabilities . . . . .	53, 75	Private schools . . . . .	14
Municipal Authorities . . . . .	49, 78	Private Sector . . . . .	11
school employees . . . . .	20, 78	Problem Solving . . . . .	58, 80
Municipal Youth Employment Program . . . . .	78	Production Schools . . . . .	79
Labor . . . . .	48	administration . . . . .	11, 44, 79
National Level . . . . .	10	cooperative arrangements with	
Night School . . . . .	37, 77	businesses . . . . .	45, 79
Normalization . . . . .	8, 78	employment outcomes . . . . .	63
Occupational Categories . . . . .	47, 75	enrollment . . . . .	45
Occupational Counselor . . . . .	25	further training . . . . .	64
OECD . . . . .	5	goals . . . . .	44, 79
On-the-job Training . . . . .	49, 78	governing body . . . . .	11
Orientation . . . . .	49, 78	instruction . . . . .	45, 79
Parent Counseling . . . . .	22, 79	Kurator recommendation . . . . .	29
Parental and home visits . . . . .	32	Kurator liaison . . . . .	32
Parents . . . . .	16	link to Special Workers Courses . . . . .	48, 80
assistance from Kurator . . . . .	32	links to Special Boarding Schools . . . . .	64
consultation with teachers . . . . .	16	overall enrollment . . . . .	44
decisions about programs . . . . .	32	payment of stipends . . . . .	45
discussions with Kurator . . . . .	32	relationship to Youth Teams . . . . .	27, 81
Kurator's work placement		sale of products . . . . .	45, 79
report . . . . .	31	vocational areas . . . . .	45, 79
meetings with Social Worker . . . . .	29	Products . . . . .	45, 79
permission to Kurator . . . . .	29	PRYO . . . . .	3
recommendations by Kurator . . . . .	29	Psychological Disorders . . . . .	16, 76
relationship with Class		Psychological Services . . . . .	7, 22, 29
Teacher . . . . .	23, 76	Psychotic Children . . . . .	19
request for Kurator . . . . .	28	Public Financing . . . . .	12
trial visits to Production		Pupil/teacher ratio . . . . .	16, 77
Schools . . . . .	45	Reading Difficulties . . . . .	19
visits by Kurator . . . . .	32	Regular Classes . . . . .	18, 26, 28, 81
Pedagogical Counselor . . . . .	21, 79	Regular School Program . . . . .	18
Pedagogical Support . . . . .	22, 79	Rehabilitation . . . . .	29
Peer Relationships . . . . .	22	Rehabilitation Centers . . . . .	57, 79
		administration . . . . .	11
		assessment of work capacity . . . . .	57
		link to Special Adult Schools . . . . .	54

## *From School To Working Life in Denmark*

links to Employment Agencies . . . . .	57	Social and Emotional Disorders . . . . .	16, 76
links to Sheltered Workshops . . . . .	55	Social Assistance . . . . .	7
program . . . . .	57, 79	Social Insurance Service . . . . .	2
referral by Kurators . . . . .	57, 79	Social Service Agencies . . . . .	23, 76
referral from Sheltered Workshops . . . . .	57	basic program . . . . .	6
referral to Sheltered Workshops . . . . .	57	Kurator's report on graduating students . . . . .	29
Rehabilitation Services . . . . .	7	links to Production Schools . . . . .	64
Residential Schools . . . . .	14, 15, 51	provision of salary support . . . . .	50
Salary . . . . .	49, 50, 78	provision of training subsidies . . . . .	50
School Age		referrals to Special Adult Schools . . . . .	53, 75
all children . . . . .	15, 77	relationship with Kurator . . . . .	21
School Boards . . . . .	11	stipends . . . . .	13
School Doctor . . . . .	23, 76	Social Services . . . . .	6
School Enrollment . . . . .	14	Social Services Agencies	
School Nurse . . . . .	23, 76	relationship to Youth Team . . . . .	27, 81
School Psychological Team . . . . .	21, 28, 29, 79	stipends for work placement . . . . .	55
composition . . . . .	21, 79	Social Subjects . . . . .	58, 77
principal functions . . . . .	22, 79	Social Worker . . . . .	8, 22, 79
school assignments . . . . .	21, 79	meetings to discuss service planning . . . . .	29
School Psychologist . . . . .	22, 23	Special Adult Schools . . . . .	53, 75
School Tired Youth . . . . .	41	curriculum . . . . .	54
Self-concept . . . . .	58, 80	Kurator liaison . . . . .	
Sensory Impairments . . . . .	17	links to Special High Schools . . . . .	58, 80
Severe Disabilities . . . . .	18, 19	period of enrollment . . . . .	54
Sexual Behavior . . . . .	53	Special Boarding Schools . . . . .	52, 79
Sheltered Employment . . . . .	62	assistance in finding employment . . . . .	64
Sheltered Path . . . . .	36, 49, 79	curriculum . . . . .	53, 80
components . . . . .	51	enrollment . . . . .	53, 80
High Production . . . . .	54, 77	independent living . . . . .	53
Low Production . . . . .	54, 79	Kurator liaison . . . . .	32
Sheltered Workshops . . . . .	79	links to Production Schools . . . . .	64
administration . . . . .	11, 54	links to Special High Schools . . . . .	58, 80
day care programs . . . . .	56, 78	links to Special Schools . . . . .	62
enrollment . . . . .	54, 79	preparation for community life . . . . .	53
graduates . . . . .		Special Classes	
high production . . . . .	54, 77	students with learning difficulties . . . . .	28, 78
link to Special Adult Schools . . . . .	54	types of students	
links to Special High Schools . . . . .	58, 80	enrolled . . . . .	28, 78
links to Special Schools . . . . .	56, 78	Special Education . . . . .	14, 16, 76
low production . . . . .	56, 78	alternative placements . . . . .	14
staff . . . . .	56	composition of population . . . . .	17
transfer from low to high production . . . . .	57	enrollment . . . . .	14
work activity programs . . . . .	56, 78	links with employers . . . . .	25
Social Adjustment Difficulties . . . . .	16, 76	mandatory schooling . . . . .	18
		population distribution . . . . .	15

## From School To Working Life in Denmark

right to . . . . .	18	abrupt discontinuation of services . . .	69
right to Kurator . . . . .	27	absence of accountable person . . . . .	68
Special Education Content . . . . .	16, 76	absence of child and family involvement . . . . .	69
Special Education Method . . . . .	16, 76	absence of comprehensive planning . . .	69
Special Education Services . . . . .	18	absence of systematic vocational transition process . . . . .	66
Special Education Structure . . . . .	16, 76	adult status of persons with disabilities . . . . .	68
Special Education eligibility . . . . .	16, 76	compartmentalization of disability programs . . . . .	68
Special Employment Subsidy . . . . .	49	coordination of programs . . . . .	66
Special High Schools . . . . .	58, 75, 80	disability policy . . . . .	65
Special Pedagogical Support . . . . .	17, 18	disability programs . . . . .	66
Special Remedial Instruction . . . . .	57, 75, 80	dispersion of management responsibility and authority . . .	68
Special Schools . . . . .	14, 15, 51, 80	employment potential of disabled persons . . . . .	66
administration . . . . .	11	Federal program structure . . . . .	69
categories of children enrolled . . . . .	51, 80	implications of Danish approach to adult education . . . . .	71
enrollment . . . . .	19	implications of Danish case advocacy strategies . . . . .	72
for mentally retarded children . . . . .	52, 77	implications of Danish Transition Approach . . . . .	70
history . . . . .	6	inadequate secondary school preparation . . . . .	69
instructional program . . . . .	52	ineffectiveness of transition programs . . . . .	66
outcomes . . . . .	62	integration of programs . . . . .	66
Special Workers Courses . . . . .	43, 48, 80	need for empowerment of individuals and families . . . . .	68
Speech Impairment . . . . .	18	need for improved service coordination . . . . .	67
Stipend . . . . .	41, 45	permanent welfare dependency . . . . .	67
Student Profiles . . . . .	31	unemployment of disabled graduates . . . . .	66
Success Rates . . . . .	63	Upper Secondary Programs . . . . .	35, 75
Supervisory Psychologist . . . . .	21, 79	Visual Handicap . . . . .	18
Support Services . . . . .	20, 78	Vocational Courses . . . . .	29
Supported Employment . . . . .	64	Vocational Fields . . . . .	47, 48, 75, 80
Teacher/pupil Ratio . . . . .	52	Vocational Orientation . . . . .	25, 78
Teachers' Council . . . . .	11	Vocational Path . . . . .	36, 62, 80
Teaching Hours . . . . .	20, 78	Vocational Schools . . . . .	43, 80
Technical School . . . . .	47, 48, 75, 76, 80	administration . . . . .	11
Training . . . . .	26, 81	drop-out rate . . . . .	63
Transition . . . . .	1, 20, 24, 32, 54	eight curricular areas . . . . .	46
Transportation . . . . .	7		
Tuition . . . . .	13, 41, 81		
Underemployed . . . . .	36, 75		
Unemployed . . . . .	36, 75		
Unions . . . . .	39, 76		
United States			

## *From School To Working Life in Denmark*

employment outcomes . . . . .	63	scheduling . . . . .	41, 81
first year courses . . . . .	46	special education . . . . .	41
instructional strategies . . . . .	47	special programs . . . . .	42
Kurator recommendation . . . . .	29	special teacher support . . . . .	42
occupational fields . . . . .	47, 75	students with severe disabilities . . . . .	42
overall program . . . . .	46, 81	Youth Team . . . . .	29, 81
professional courses . . . . .	46, 81	composition . . . . .	27, 81
special assistance . . . . .	47		
special vocational programs . . . . .	47, 81		
the academic program . . . . .	46, 81		
Waiting periods . . . . .	2		
Work assignments . . . . .	41		
Work capacity . . . . .	7, 49, 76		
Work experience . . . . .	3, 24, 77		
decisions by parents . . . . .	32		
entry into Gymnasium . . . . .	37, 77		
Kurator visits . . . . .	30		
role of Guidance Teacher . . . . .	24, 77		
Work placement . . . . .	25		
by Kurator . . . . .	31		
decisions by parents . . . . .	32		
Kurator visits . . . . .	30		
Kurator's report . . . . .	31		
schedules . . . . .	40		
special programs in Sheltered Workshops . . . . .	55, 78		
Working Conditions . . . . .	41		
Workplace adjustment . . . . .	3		
Youth Advisor . . . . .	24, 75, 81		
age of students . . . . .	26, 81		
responsibilities . . . . .	26, 81		
Youth Council . . . . .	27, 81		
Youth Education . . . . .	37, 80		
Youth Employment Guarantee . . . . .	49		
Youth Employment programs			
administration . . . . .	11		
curriculum . . . . .	49, 78		
Youth Schools . . . . .	81		
classroom organization . . . . .	42		
curriculum . . . . .	42, 81		
enrollment . . . . .	41, 81		
instruction . . . . .	41, 81		
Kurator liaison . . . . .	32		
level I courses . . . . .	42, 81		
level II courses . . . . .	42		
level III courses . . . . .	43, 81		
location . . . . .	42		