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Case Manager Perspectives on Transition Services for Youth with Intellectual Disabilities

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This is to certify that the doctoral dissertation by

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Walden University
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Abstract

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MS, Troy University, 2011

BS, Troy University, 2007

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

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Abstract

Youth with intellectual disabilities have poorer outcomes during the transition period from school to adulthood. Very few studies were found that examine the perspective of the human service case manager. The perspectives of human service case managers were examined regarding the services that are needed to help youth with intellectual disabilities transition effectively. The study's purpose was to determine the services available and those needed to help support the transition from school to work, college, or in living independently for youth with intellectual disabilities. The theoretical framework for this study was Bronfenbrenner's ecological systems theory used to explore the errors within the current system of transition services. Using a generic qualitative research design and semi structured interviews, perspectives of the human service case managers were analyzed. The resulting themes were (a) nonprofits should provide skills training and supports proactively earlier to help bridge the gap in transition planning, (b) uncertainties and lack of services are detrimental to the transition processes, and (c) parents, teachers, and key administrators present barriers to effective transition planning. The results of the analyzes indicate that services that are proactive and team members that work together for the student to help address their future needs can help the student transition effectively into adulthood. The results of this study may improve advocacy and supports provided by the case manager which can help improve the transition process for youth with intellectual disabilities.

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Dedication

This dissertation is dedicated to my loving and supportive husband Kervin Sr. and my children Zera and Kervin Jr. Thank you for being so patient yet supportive during this rewarding journey. Remember, "whatever you ask for in faith, believe that you have received it and it will be yours". Mark 11:24

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Table of Contents

List of Tables

List of Figures

Chapter 1: Introduction to the Study

Introduction

Intellectual disabilities are characterized by deficits in reasoning, problem solving, planning, thinking abstractly, learning, and learning from experiences (American Psychiatric Association, 2013). The intelligence quotient cut-off to be diagnosed with an intellectual disability is 70 or less (Anderson et al., 2019). A diagnosis of having an intellectual disability is confirmed by clinical and standardized intelligence testing (American Psychiatric Association, 2013).

Federal guidelines require transition services to be provided to youth aged 16 to 22 diagnosed with an intellectual disability (Mello et al., 2021). State services provided to youth with intellectual disabilities cost approximately $18,009 per year for youth 21 years old or younger (Larson et al., 2017). Those that reside with family cost $14,323 annually (Larson et al., 2017).

Transition services are a key component of the educational experience for youth with disabilities (Poppen, et al.2016). Transition services include assessment, planning, and instruction related to future education, employment, and independent living (Dawalt et al., 2020; Trainor et al., 2016). Transition services focus on education, employment, and independent living (Dawalt et al., 2020). The case manager's role is vital in relation to supports when working with people with intellectual disabilities (Bogenschutz et al., 2019). Successful interventions are based on the case manager's ability to encourage change in the people that are important to the individual, while working to meet the individual's wants and needs (Fennessy et al., 2015). Further research is needed to

determine the perspective of the human service case manager regarding the needed services for youth with intellectual disabilities to help them transition successfully into adulthood.

There has been little research conducted on the services needed to help youth with intellectual disabilities transition into adulthood successfully (Kaya, 2018). This information is beneficial because the transition period is the time when youth prepare to enter adulthood, requiring self-determinization skills and learning to maintain social networks (Wehman, 2020). This time period is very complex for most people but for people with intellectual disabilities a shift in service facilitation occurs, from education systems assisting the individual to adult service providers helping the individual navigate the system of services (Wehman, 2020). The perspective of the case manager related to transition services is beneficial to understand because they are one of the main active participants of the individual's team of support professionals. My goal for this study was to address the gap in research on the services currently provided during the transition to adulthood for youth with intellectual disabilities. The sections in this chapter include the background of the problem, problem statement, purpose of the study, research questions, theoretical framework, nature of the study, definitions, assumptions, scope, and delimitation, limitations, and significance of the study.

Background

After the closing of state institutions in the 1960s through 1980s in the United States, community-based services showed to be of greater benefit for people with intellectual disabilities (Manswell, 2006). Community based services include

environments that are less restrictive, overall improvements in self-care, independent living, self-direction, taking responsibility, and an increase in social skills and interactions with people without disabilities (Bredwold et al., 2020). The need for social inclusion became a major goal of the deinstitutionalization movement, with the goal of ensuring that individuals with disabilities have education, work, and social services in the least restrictive environment and in social inclusion (Bredewold et al., 2020).

Parents of youth with intellectual disabilities formed advocacy groups for their children demanding better treatment like "normal" children receive (Perry, 2016). Better treatment included educational experiences that children without disabilities had access to, which led to the requirement for free and appropriate education for all children including personalized services to meet their individual needs (U.S. Education, n.d.). Despite this movement for better treatment by parents, transition age youth with intellectual disabilities have fewer employment opportunities, with more than half being placed in nonwork or recreational programs (Bolourian & Blacher, 2018). Most federal services end at the age of 22 years old, leaving individuals and their families without coordinated support.

Researchers have studied the transition process and the barriers limiting engagement in the process for youth with intellectual disabilities (Dressler et al., 2018). Support professionals such as teachers and school or day placement staff are often regarded as important to the transition process due to their frequent interactions with the youth and parents (Hughes et al., 2018). However, human service case managers are often looked to for guidance in the overall transition process to determine what supports

and services are available to the youth with intellectual disabilities, so it is important to understand their knowledge in this area.

      This study is important because the transition process presents many uncertainties regarding post-secondary outcomes, work, and the possibility of living independently for youth with intellectual disabilities (Austin et al., 2018; Papay & Bambara, 2014). For most youth, obtaining a higher education is a goal that many hope to reach after the completion of high school (Bolourian & Blacher, 2018). However, for youth with intellectual disabilities that attend post-secondary programs, the process can be challenging both academically and socially (Bolourian & Blacher, 2018).

Problem Statement

      Transitioning into adulthood can be challenging for youth with intellectual disabilities who may experience uncertainties regarding post-secondary outcomes, work, and the possibility of living independently (Austin et al., 2018; Papay & Bambara, 2014). Youth with intellectual disabilities have lower rates of employment than youth without disabilities (Kaya, 2018) and they attend postsecondary institutions less often than youth without disabilities (Grigal et al.,2014). Possible future issues with employment and social inclusion emerge most often during the transition to becoming an adult, which may continue throughout adulthood if they are not supplied with the tools to make this transition successfully (Wilson et al., 2017). These uncertainties can result in youth with intellectual disabilities experiencing anxiety and depression in relation to their futures, which can also result in their caregivers having concerns as well (Austin et al., 2018).

The problem that I addressed in this study was the lack of access to services for youth with intellectual disabilities to successfully transition to adulthood.

Although the aforementioned research regarding the need for assistance during the transition period for youth with intellectual disabilities (Kaya, 2018; Wilson et al., 2017) illuminates' important findings, In my review of the literature on this topic, I found no researchers who examined the perspective of human service case managers who work with individuals with intellectual disabilities in regard to the services that are available and those that are needed in order to support the individual and make this transition successfully. Further research was warranted to address the appropriate services that could help youth transition between high school and adulthood successfully.

Purpose of the Study

The purpose of this generic qualitative research design study was to further understand the perspective of human service case managers who work with individuals with intellectual disabilities in regard to services that are available and those that are needed in order to support individuals with intellectual disabilities to make this transition to adulthood successfully. I used semi structured interviews to gather information from human service case managers.

Research Questions

Research Question 1 (RQ1): What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not effectively provided to these individuals to help with the transition between high school and adulthood?

Research Question 2 (RQ2): What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge any gaps in transition services already offered by public entities?

Theoretical Framework

I used ecological systems theory (EST) as the theoretical foundation for this study. A major function of the theory is to examine how systems function and how it is used for a holistic approach to addressing services (Bridgen, 2017). EST defines human development as being related to how an individual perceives and reacts to the different settings of their environment (Bronfenbrenner, 1979).

A setting is a place with specific physical features where the individual participates in specific activities and specific roles for a specific timeframe (Bronfenbrenner, 1977; Ruppar et al., 2017). The elements of a setting are the features of "place, time, physical features, activity, participant, and role" (Bronfenbrenner, 1977 p. 514). The setting is a location where the participants can willingly participate in face-to-face exchanges such as the home or a day activity center (Bronfenbrenner, 1979).

Ecological systems theory was the best theory for this study because it can be used to examine how each setting may influence an individual's behavior (Bronfenbrenner, 1979). Human service case managers work within the settings/levels related to themselves as an individual and professional but also must be able to navigate the settings/levels that are related to the supports and services available to transition age youth with intellectual disabilities.

There are five levels of ecological systems theory that influence an individual's development: the microsystem, mesosystem, exosystem, macrosystem, and chronosystem. Each layer has unique developmental processes (Cross, 2017). The microsystem is the immediate setting of interrelations of the developing individual (Bronfenbrenner, 1979). It is the level where the individual directly participates (Crawford et al., 2019). It includes the individual's activities and interpersonal roles (Bronfenbrenner, 1979). This level includes the individual's peers, service providers, teachers, or family (Ruppar et al., 2017).

The mesosystem includes the interrelations among settings during a particular time (Bronfenbrenner, 1977) The mesosystem includes the relationships between microsystems such as the family, social interactions, or work interactions (Fearnley, 2019). This setting can also include the individualized education plan team (Ruppar et al., 2017).

The exosystem embraces other structures that are formal and informal but does not include the individual (Bronfenbrenner, 1977). This setting includes system-level issues and federal policies (Hirano et al., 2018). Some examples of exosystems are social services, relationships between school and the community, methods of communication, and attributes of the neighborhood (Bronfenbrenner, 1977). The exosystem also includes the parents, fire department, social services, medical professionals, and other forms of family support (Cross, 2017).

The macrosystem determines activities in the micro, meso, and exosystems. It is considered the cultural blueprint (Bronfenbrenner, 1979). The values and traditions of a

culture are found in this level (Crawford et al., 2019). The macrosystem element are those that are linked to disability or cultural roles that are related to authority (Odom & Diamond, 1998).

The chronosystem includes changes that have occurred over time in the characteristics of the person as well as their environment (Bronfenbrenner, 1986). The changes include family structure over a lifetime, socioeconomic status, employment, and the degree of chaos in the individual's everyday life (Bronfenbrenner, 1994). This setting revolves around life traditions (Bronfenbrenner, 1986).

Nature of the Study

I conducted a generic, qualitative research study using semi structured interviews. The generic qualitative research design is used to investigate opinions, attitudes, beliefs, and/or experiences (Percy et al., 2015). This design has more flexibility in relation to the process of information collected qualitatively than the other qualitative research designs (Percy et al., 2015). My goal for this study was a deeper understanding of perspectives of human service case managers who work with individuals with intellectual disabilities in regard to the services that are available and those that are needed in order to support the individual and make this transition to adulthood successfully.

Definitions

I used the following terms in this study:

Case Manager: A professional in the human services field that manages the social services for an individual with intellectual disabilities. This includes helping to plan and organize transition services (Bogenschutz et al.,2019; Stanhope, et al., 2016).

Deinstitutionalization: This societal movement caused several long-term facilities to be shut down which allowed people who would have historically been housed in settings removed from the general population to be moved into less restrictive, and more normalized, community placements (Chowdhurry & Benson, 2011; Perry, 2016).

Human service professional: These people work in human service organizations to meet human needs through an interdisciplinary knowledge base, focusing on prevention as well as remediation of problems, and maintaining a commitment to improving the overall quality life of service populations. The Human Services profession is one which promotes improved service delivery systems by addressing not only the quality of direct services, but also by seeking to improve accessibility, accountability, and coordination among professionals and agencies in service delivery. (NOHS, n.d., para. 1).

Individualized education plan (IEP): Educational plan for a student with disabilities. This plan is created by the student, their parents(s)/guardian(s), and professionals to address the student's wants, needs, and strengths, and includes a plan to make the transition from school to work/adult life (Trainor, Morningstar, & Murray, 2016).

Intellectual disability: A diagnosis related to deficits in mental health capabilities that results in impairments in adaptive functioning during the developmental period (American Psychiatric Association, 2013). Adaptive functioning includes personal independence and social influence in at least one activity of daily living such as communication, social skills, academic or employment activities, and personal independence in the home or community (APA, 2013). The intelligence quotient cut-off

to be diagnosed with an intellectual disability is 70 or less (Anderson, Larson, MapelLentz, & Hall-Lande, 2019).

Transition Services: Support provided to an individual in the areas of education, employment, and independent living to assist with making a smooth transition to adult life (Dewalt et al., 2020; Trainor, et al., 2016).

Scope and Delimitations

The scope of the study was limited to participants that were at least 18 years of age, who speak and understand English, and who had experience working as a human services case manager (for at least 6 months) with youth with intellectual disabilities that were going through the transition process. I only included the information from those who self-identified as a human service case manager and not of other transition team members. Generalization of the results of the study was only to those who matched the scope.

Transferability was established by using purposeful sampling. I used purposeful sampling to ensure that the participants had data that I could use to answer the research questions (Merriam & Tisdell, 2016). I ensured transferability by detailing my study so that the results can be replicated (Amankwaa, 2016). I used pseudonyms for naming the participants and carefully considered the sample of the study.

Limitations

A limitation of this study was the use of convenience and snowball sampling. I used convenience sampling in which anyone who believed that they met the inclusion criteria and who saw the recruitment materials could contact me to volunteer. If they met

the criteria, and I still needed interview data, the participant was included. This means

that I did not select members of the sample to have a demographically varied sample

based on the overall population, so this was a limitation in relation to generalization of

the results (Business Research Methodology, n.d.).

I also used snowball sampling for this study. The recruitment materials contained

a statement that if the reader knew of anyone who qualified to participate that they should

forward that recruitment material to that individual. If the potential participant reached

out to me and met the inclusion criteria, they were also interviewed if I still needed data.

Like convenience sampling, this potentially limited the generalizability of the results

(Business Research Methodology, n.d.).

Another limitation was conducting interviews virtually. This may have limited the

participants to those that felt comfortable with the method for conducting the interviews

virtually and/or those that had access to the technology that was used to conduct the

interviews. This may have skewed the participants to those that were more virtually

savvy or who had access to that technology. This also could have limited representation

of potential participants in rural or lower socioeconomic areas (Roberts et al., 2021).

Significance

It was important to have a better understanding of the perspectives of human

service case managers who supported individuals with intellectual disabilities transition

to adulthood successfully. In this study, I was able to: (a) inform human service agencies

and nonprofit organizations about the services they may want to start to offer, (b) develop

training and resources available to human service case managers to assist them in

accessing services that are available and, (c) identified gaps in what human service case managers knew about services available to their clients with intellectual disabilities. This information could be used to improve the support and advocacy provided by human service case managers to the individuals they serve and therefore improve the success of the transitions for youth with individuals with intellectual disabilities.

Summary

In Chapter 1, I provided a background of the problem, problem statement, purpose of the study, research questions, theoretical framework, nature of the study, definitions, assumptions, scope, and delimitations, limitations, and significance of the study. The theoretical framework used for the study was ecological systems theory (EST). I conducted this study to understand specific transition services that human service case managers use to help individuals with intellectual disabilities transition between high school and adulthood and develop recommendations for specific transition services that could be used to bridge any gaps in transition services already offered by public entities. In Chapter 2 I will discuss the theoretical foundation for the study in more detail and provide a review of the literature related to the identified research problem and gap in the literature that this study was based on.

Chapter 2: Literature Review

Introduction

Transitioning into adulthood can be challenging for youth with intellectual disabilities, with individuals experiencing uncertainties regarding post-secondary outcomes, work, and the possibility of living independently (Austin et al.,2018; Papay & Bambara, 2014). Youth with intellectual disabilities have lower rates of employment than youth without disabilities (Kaya, 2018) and they attend post-secondary institutions less often than youth without disabilities (Grigal et al., 2014). Possible future issues with employment and social inclusion emerge most often during the transition to becoming an adult, which may continue throughout adulthood if they are not supplied with the tools to make this transition successfully (Wilson et al., 2017). These uncertainties can result in youth with intellectual disabilities experiencing anxiety and depression in relation to their futures which can also result in their caregivers having concerns as well (Austin et al., 2018). The problem that I addressed in this study was the lack of access to services for youth with intellectual disabilities to successfully transition to adulthood.

The purpose of this generic qualitative research design study was to further understand the perspective of human service case managers who work with individuals with intellectual disabilities regarding services that are available and those that are needed to support the individual and make the transition to adulthood successfully. I was not able to find any extant studies in which the researchers examined the perspective of the human service case managers regarding transition services for individuals with intellectual disabilities.

Researchers have studied the transition process and the barriers limiting engagement in the process for youth with disabilities (Dressler et al., 2018). Waitlists have been identified as a key barrier to successful transition planning for youth with intellectual disabilities (McKay, 2019). There is also a lack of services being provided between youth services and the start of adult services and a lack of representation from adult service providers during the transition planning period (McKay, 2019). It has been found that individuals with intellectual disabilities believe support professionals such as teachers, social workers, and youth workers are important to their transition process (Hughes et al., 2018). Special education instructors have the most influence over the students' access to the content and context of their general education (Ruppar, et al.,2016). Individuals with intellectual disabilities look to case managers for guidance regarding supports and services, so it was important to understand their knowledge in this area.

Within the service field, successful interventions are based on the case manager's ability to provide change with the system of relationships both personally and professionally, and to work towards meeting the personal goals of the person as much as they can (Fennessy et al., 2015). The case manager is also expected to coordinate the process of developing a comprehensive system of services that meets the needs of the individual (Bogenshutz et al., 2019). However, families only consider the human service case manager as the gate keeper for the services (Hughes et al., 2018).

Literature Search Strategy

I searched for peer-reviewed and scholarly articles from 1977 to 2020. I used the Walden University Thoreau search system as the main source for retrieving the research articles. In this study I used the following databases: EBSCO, APA PsychInfo, Taylor and Francis Online, Academic Search Complete, and ERIC. I used Google Scholar for articles that were not located in the Walden Library databases. The peer-reviewed articles were gathered based on their use of the systems theory theoretical framework. The key search terms were *systems theory ecological systems theory, transitions and disabilities, systems theory and case management, systems theory and psychology, systems theory and public administration, individual characteristics,* and *transitions and adulthood*.

Theoretical Foundation

I used the ecological systems theory as the theoretical foundation for this study. Systems theory was introduced by Ludwig von Bertalanffy during the 1930s and is used to examine interrelated problems within a larger system (Bertalanffy, 1974). A major function of the theory is to examine how systems function and allows for a holistic approach to addressing the services that are needed (Bridgen, 2017). The theory can be applied in a variety of disciplines including communication, business, ecology, philosophy, physics, and engineering (McMahon & Patton, 2018). Luhmann was a sociologist who modified systems theory for use in social sciences and explained how to break down the larger societal systems into smaller systems that are distinctive systems in and of themselves (Valeo, 2015).

Ecological system theory defines human development as being related to how an individual perceives and reacts to their environment (Bronfenbrenner, 1979). An ecological approach examines the joint impact of two or more settings (Bronfenbrenner, 1977). A setting is a place with specific physical features where the individual participates in specific activities and specific roles for a specific timeframe (Bronfenbrenner, 1977). The elements of a setting are the features of "place, time, physical features, activity, participant, and role" (Bronfenbrenner, 1977 p. 514). The setting is a location where the participants can willingly participate in face-to-face exchanges such as the home or a day activity center (Bronfenbrenner, 1979). Systems theory complements traditional science as it allows the researcher to see the bigger picture of what is needed regarding developmental supports (Bridgen, 2017). The systems theory approach considers both internal and external factors when examining problems (Bridgen, 2017). It can be used to inform the theory of the problem and it can determine the most appropriate action for addressing a problem (Schelbe et al., 2018). The theory has been used as a theory of change and has been applied to design interventions and to measure outcomes (Schelbe et al., 2018).

Components of Ecological Systems Theory

Ecological systems theory proposes that individuals are exposed to different and interdependent systems (Ruppar et al., 2017). The framework concentrates on components/subsystems of the individual's role and the ways the subsystems interact and have influence on each other (Bronfenbrenner, 1994). The subsystems are multiple

layers like an onion but that interact between each other to influence an individual (Bronfenbrenner, 1994).

Ecological systems theory explains the different settings and groups that people belong to and interact with and how those things influence human development (Bronfenbrenner, 1979). Bronfenbrenner believed that physical attributes of a setting could possibly provoke behaviors (Cross, 2017). Bronfenbrenner's model details the concept of proximal processes, which are energy exchanges between the developing individual and the people, objects, and symbols in their current setting that occur over a developmental period (Ferguson & Evans, 2019). A key aspect of proximal processes is that they are shared between the child and its environment (Ferguson & Evans, 2019). Proximal processes should gradually become more complex as the child develops (Ferguson & Evans, 2019). Settings that limit proximal processes such as those that are unstable can be damaging to the developing child (Bronfenbrenner, 1986).

The ecological systems theory is useful for explaining how systems affect a person individually (Ruppar et al., 2017). The five levels of ecological systems theory that influence an individual's development are the microsystem, mesosystem, exosystem, macrosystem, and chronosystem (see Figure 1). Within each of the five layers there are developmental processes that exist that are unique to each layer (Cross, 2017). The individual is at the center of concentric circles which represents the levels of systems that the individual participates in (Hirano et al., 2018). The circles also identify overlapping and systems that are interrelated, which influence the individual characteristics.

Figure 1

Ecological Systems Theory Component Levels
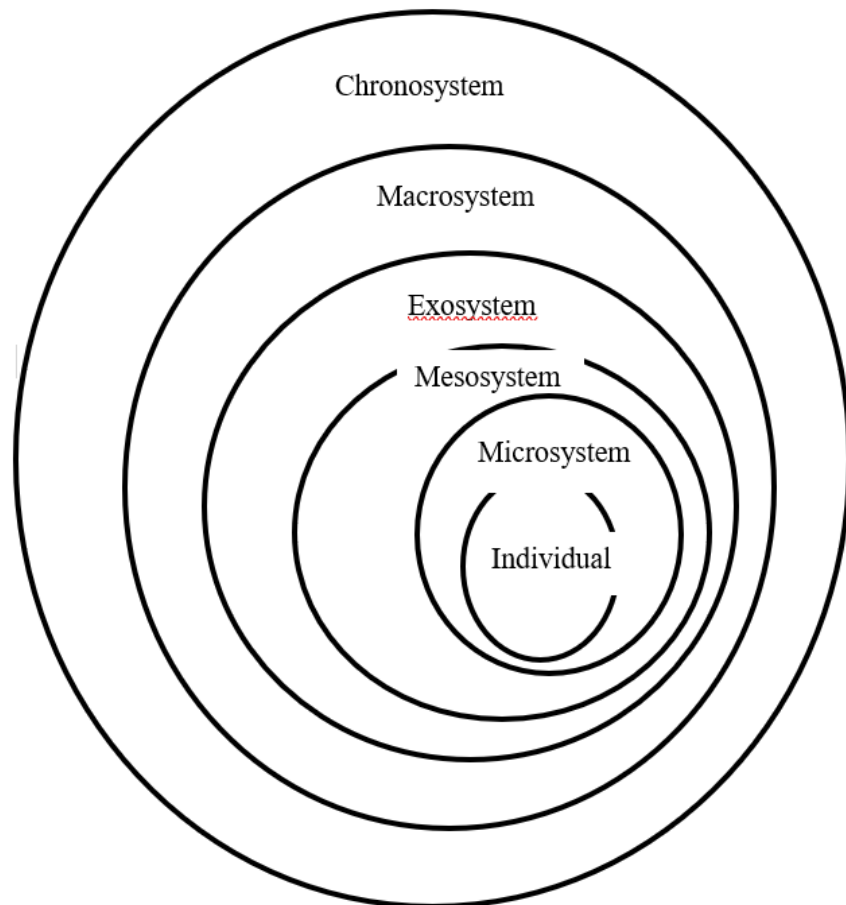
Individual Characteristics

The individual brings a span of characteristics into their contexts and to the individuals and systems that they interact with (Kitchen et al., 2019). The key individual characteristics identified in this theory include sex, age, self-image, the person's health, their ability, disability, physical features, their beliefs, personal interests, their values, aptitudes, skills, knowledge of work, their sexual orientation, and ethnicity (Patton & McMahon, 2015). The emotional and psychological factors are also characteristics that

should be considered at this level of the individual (Crawford et al., 2019). Understanding the characteristics that the individual has and their relationships with their different environments gives a holistic understanding of the individual and the many influences that shape their experiences (Kitchen et al., 2019).

Microsystem

The microsystem is a pattern of activities, roles, and interpersonal connections that are experienced by the developing individual in a specified setting with specific characteristics (Bronfenbrenner, 1979). The microsystem is the immediate setting of interrelations of the developing individual (Bronfenbrenner, 1979). This system is where the individual directly participates (Crawford et al., 2019). A critical aspect of the microsystem is how the individual perceives or experiences the properties within the environment (Bronfenbrenner, 1979). It requires reciprocity, that behavior is reciprocal in social situations (Bronfenbrenner, 1977).

The microsystem includes the individual's family, siblings, and the home environment (Cross, 2017). This setting includes the activities and interpersonal roles that the individual engages in (Bronfenbrenner, 1979). Within the system the individual is at the center and has direct influence on several microsystems (Fearnley, 2019).

Mesosystem

The mesosystem includes the interrelations among settings of the individual during a particular time in their life (Bronfenbrenner, 1977). It is nested within the microsystem (Neal & Neal, 2013). The mesosystem is created when the individual moves into a new setting (Bronfenbrenner, 1979). It allows a series of effects to occur when a

second setting is added (Bronfenbrenner, 1977). When studying the individual from multiple settings it highlights the likelihood that events in one social environment could possibly influence the individual's behavior and development in another social environment (Bronfenbrenner, 1977). It also includes the relationships between microsystems such as the family, social interactions, or work interactions (Fearnley, 2019).

Exosystem

The exosystem supports other structures that are formal and informal but does not include the individual but does include the immediate setting of the individual (Bronfenbrenner, 1977). It consists of system-level issues and federal policies (Hirano et al., 2018). The exosystem explores the unknown territories that have influence on development (Bronfenbrenner, 1977). It includes the social policies created by those that are not participating in the setting (Odom & Diamond, 1998). Some examples of exosystems are social services, relationships between school and the community, methods of communication, and attributes of the neighborhood (Bronfenbrenner, 1977). This level also includes the parents, fire department, social services, medical professionals, and other forms of family support (Cross, 2017). This level notes that psychological development for the child is affected by what happens in different environments that the child frequents as well but also environments that the parent lives their lives that the child rarely enters (Bronfenbrenner, 1986).

Macrosystem

The macrosystem refers to general prototypes within the culture or subculture, which sets the pattern for the structures that occur at the concrete level (Bronfenbrenner, 1977). The macrosystem determines the activities in the micro-, meso-, and exosystems. It is the cultural blueprint which may differ based on socioeconomic status (Bronfenbrenner, 1979). At this level it encourages one to look beyond the labels of class and culture. This level classifies the social and psychological features that influence the conditions occurring in the micro level. This system includes the social policies of the local and national government as well as the ideologies (Cross, 2017). The values and traditions of a culture are also found in this level (Crawford et al., 2019). The effects of this level can have long-ranging outcomes on the individual (Neal & Neal, 2013).

Chronosystem

The chronosystem is the evolution of events over a life course (Harkonen, 2007). The chronosystem includes changes that occurred over time in the characteristics of the person as well as the environment they live in including the element of time (Bronfenbrenner, 1986). The changes include family structure over a lifetime, socioeconomic status, employment, and the degree of chaos in the individual's everyday life (Bronfenbrenner, 1994). The chronosystem is a reference tool for studying psychological changes as the individual develops (Bronfenbrenner, 1986). The chronosystem revolves around life transitions (Bronfenbrenner, 1986). The transitions serve as a direct influence for developmental change (Bronfenbrenner, 1986).

Interaction of Component Levels

Systems in the ecological systems theory are described as either open or closed. Open systems permit resources and information to enter the system while closed systems do not (Schelbe et al., 2018). Subsystems are systems that are smaller that exist within a larger system (Schelbe et al., 2018). Within a subsystem a person will have a set of roles that are behaviors and functions that are expected within a system (Schelbe et al., 2018). There are seven principles related to systems within the ecological systems theory: 1) systems are interrelated components of an organized whole; 2) each part has an effect on the others and the whole; 3) the whole is more significant than the sum of the individual parts; 4) the systems are determined by their boundaries 5) systems receive input and response from their surroundings; 6) systems aim to achieve goals and; 7) systems are inclined towards equilibrium (Shelbe et al., 2018).

Systems are Interrelated Components of an Organized Whole. A system is a whole consisting of interrelated parts working together to accomplish a task (Schelbe et al., 2018). Systems are units composed of interrelated components that act in ordered interdependent ways to encourage the survival of the whole unit (Pianta,1999). The ecological model places the individual at the center and identifies the interrelated systems that have influence on the individual (Ruppar et al., 2017).

Each Part influences the Others and the Whole. Systems are arranged in a hierarchy, with individual subsystems interacting with the other levels (Schelbe et al., 2018). Systems should be studied to determine how each influenced the other (Kearney et al.,2016). The organization of the system can be understood by how the system maintains

itself and advances its purpose (Schelbe et all., 2018). System theory encourages the considerations of parts as well as the interconnection within the parts, as implanted in their external environment (Jung & Vakharia, 2019).

The theory helps organizations understand their internal and external environments holistically compared to the traditional sense of only examining one aspect of the organization, such as funding, outputs, or programs individually (Jung & Vakharia, 2019). The principles of systems theory emphasize the understanding of the behavior of a system and its parts in comparison to the unit as a whole and understanding the properties of the whole in relation to its context (Pianta, 1999).

The Whole is More Significant Than the Sum of the Individual Parts. The developing individual is considered a system and cannot be studied in one domain (Pianta, 1999). The individual should be studied from multiple domains (Pianta, 1999). The multiple social roles and individual factors should be examined when studying the person (Ruppar et al., 2017).

The whole defines the meaning to the activities of the parts (Pianta, 1999). Behavior should be studied across several developmental domains when studying the individual. Thus, the whole individual as a system cannot merely be explained in terms of its individual parts but instead the many contributing elements (Pianta, 1999).

The Systems Are Determined by Their Boundaries. Social systems need to maintain boundaries to differentiate between what is inside the system and outside (Mayger & Hochbein, 2019). Closed systems do not allow exchanges with external systems (Schelbe et al., 2018). Certain systems within levels function across more than

one level and are considered boundary spanners (Mayger & Hochbein, 2019). Individuals and organizations attempting to function in more than one system can experience tension when navigating different social systems with different purposes and intentions (Mayger & Hochbein, 2019). They must be aware of the different rules of the different systems in which they are functioning in, and this can sometimes be in contradiction to one another.

Open systems can be applicable to arts and cultural organizations due to their unique use of mission, vision, educational purpose, and changes to external environment (Jung & Vakharia, 2019). Nonprofits can benefit from having organizational structures that are more open and less hierarchical, where programming can be completed on multiple levels and with the needs of community in mind (Jung & Vakharia, 2019). These organizations must focus on the happenings internally and external to the environment to maintain their service provision (Jung & Vakharia, 2019). The system's organization is understood by how it maintains itself and furthers the purpose (Schelbe et al., 2018).

Systems Receive Input and Response from their Surroundings. There are four key functions within a system or subsystem, they are *input, process, output*, and *feedback* (Boreum, 2019). *Input* is the resources that are entering into the system from a larger environment and other systems such as information and communication (Schelbe et al., 2018). Personal resources are considered input (Itzhaky et al., 2015). *Processes* are the interactions of the input and outputs. Input and processes both influence performance (Iglen et al., 2005).   The interaction of the personal resources that are available for the individual with the resources available in the community will experience a process of conversion, which results in the resources joining together to contribute to the target

measures which are considered the *outputs* (Itzhaky et al., 2015). *Outputs* are the results or the goals of achieved (Mizikaci, 2006).   *Feedback* is a method of input that shows the system's performance, what it does correctly or incorrectly (Schelbe et al., 2018). Input influences process, which affects output and output influences feedback, and feedback influences input (Boreum, 2019). Therefore, the loop continues (Boreum, 2019).

Systems Aim to Achieve Goals. Systems work to complete a common goal. Cultural-level codes are a method for measuring developmental milestones or expectations for child development (Pianta, 1999). The codes are long-term actions or goals (Pianta, 1999). Goals are important because they evaluate the effectiveness of a system. Goal-directed systems are those that attempt to maintain the objective state while experiencing external and internal disruptions (Bedau, 1992). When the system is threatened, the behavior of the system is altered so that the system can reestablish its direction toward the desired state (Bedau, 1992).

Systems are Inclined Towards Equilibrium. Equilibrium represents the most desirable state as it allows for the system to survive for a long period of time (Porvaznik & Ljudvigova, 2016). This includes the attempts to control the invariable states within boundaries (Porvaznik & Ljudvigova, 2016). If equilibrium is achieved the system will gain the best results and if equilibrium is not maintained the system may decline (Porvaznik & Liudvigova, 2016).

Equilibrium can be goal-directed (Bedau, 1992). Systems aim to try to maintain a steady state, however many do not persistently try to attempt a goal (Bedau, 1992). Equilibrium can sometimes be viewed as states of rest, where all motion stops.

Equilibrium systems display persistent and plastic behavior regarding their equilibrium state (Bedau, 1992).

Ecological Systems Theory and Individuals with Intellectual Disabilities

The levels outlined in the ecological systems theory include peers, family, the media, groups in the community, the workplace, and in education institutions but also other support services and those who support the individual in the systems (Patton & McMahon, 2015). In this section details are provided on how the actions and activities in the system levels are similar and different for individuals with disabilities (see Figure 2).

Figure 2

Ecological Systems Theory Levels
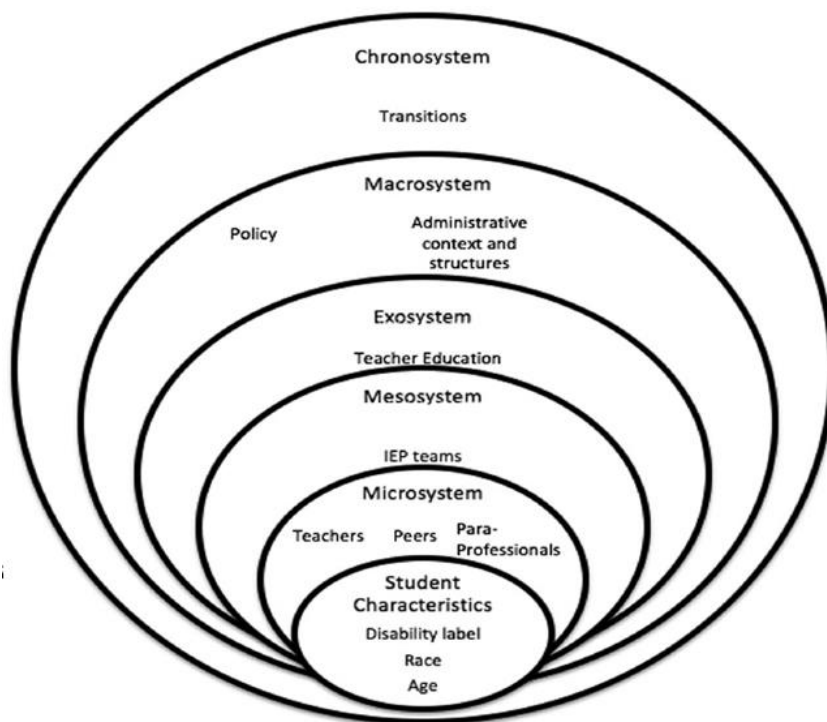
Individual Characteristics

An individual's characteristics should be examined in relation to the contexts that the disability is displayed as a trait can only be seen as a disability if it impedes one or more functions of daily living (Ruppar et al., 2017). Sociocultural factors that occur outside of the classroom are believed to have an influence on development and academic achievement (Sontage, 1996).Distinctive characteristics of the individual must be considered such as the type of disability, nature, and their age (Rouse et al., 2005). Gender, age, race, and ethnicity are important charateristics to consider when considering services (Sevak et al., 2015). Bronfenbrenner believed that the most important characteristics that should be studied are body size characteristics, physical disabilities, and physical characteristics such as race, age, and sex (Sontag, 1996).

Challenging behaviors and mental disorders are often characteristics of those with intellectual disabilities, with males having a higher rate of challenging behaviors (Hassiotis et al. 2008). The disability status and socioeconomic status independently increases the chance of having negative postschool outcomes (Murray, 2003). Those with high risk behaviors may most likely experience negative postchool outcomes (Murray, 2003).

Inequality is also experienced by people with disabilities (Lauer & Houtenville, 2018). Social inequalities are common among people with disabilities that self-report (Lauer & Houtenville, 2018). The population less often have a college education, employment and have a greater risk of living below the poverty line (Lauer & Houtenville, 2018).

Microsystem

This level includes the individual and organizations that have direct interaction and influence on the individual's day-to-day educational contents and contexts (Ruppar et al., 2017). The microsystem includes family, service providers, peers, and school staff (Hirano et al., 2018).

Bronfenbrenner believed that the environmental properties have the most influence on growth of the individual which are those that have the most meaning to the person in a certain situation (Songtag, 1996). The distinctive characteristics of the caregivers, instructors, and peers of the individual are included in this level (Sontag, 1996).

Mesosystem

The mesosystem includes several microsystems such as the school staff, administrators, and non-immediate family members who have contact with the individual but not as intimate or daily interactions (Ruppar et al., 2017). This level may include an event that occurred in the home or with family or interactions among professionals outside of the classroom (Odom & Diamond, 1998). The individualized education plan team would be found in this level. The team works together to develop an IEP plan that addresses the accomadations necessary for the individual to be successful in a school setting (Ruppar et al., 2017). This level also includes the cocurricular activities that the individual participates in (Sontag, 1996).

Exosystem

The exosystem consists of system-level issues and federal policies (Hirano et al., 2018). Some examples of exosystms are social services, relationships between school and the community, methods of communication, and attributes of the neighborhood (Bronfenbrenner, 1977). Support groups can be found in this level (Songtag, 1996). Linkages can occur between the mesosystem and exosystem that are beneficial for growth of the individual, such as a caregiver interacting with someone outside of the home that has a relationship with the individual (Sontag, 1996).

Macrosystem

The macrosystem variables are those that are linked to disability or cultural roles that are related to authority (Odom & Diamond, 1998). These variables have influence over the people within the system that makes decisions regarding placement and instructional planning for the individual (Ruppar et al., 2017).

Bronfenbrenner believed that the beliefs of the people most important to the individual create a context that determines the goals, risks, and practices for the upbringing of the indvidual (Sontag, 1996). In this level beliefs are passed down by cultural institutions, the church, the family, and government (Sontag, 1996). Inequality is also experienced by people with disabilities (Lauer & Houtenville, 2018).

Chronosytem

The chronosystem level includes the changes overtime in the individual's life that have an affect on their educationational content and contexts (Ruppar et al., 2017). Transitions between schools or different levels in education are key indicators that impact

decisions regarding placement (Ruppar et al., 2017). The macrosystem and chronosystem are connected in the experience of same-age cohorts that experience a historical context simultaneously (Arnold et al., 2012). Bronfenbrenner (1986) noted that transitions can be *normative* and *nonnormative*.

Normative transitions are those involving school entry, puberty, entering the world of work, marriage, or retirement (Bronfenbrenner, 1986). *Nonnormative transitions* include a death or major illness in the family, divorce, relocating, or winning a lottery (Bronfenbrenner, 1986). When studying transitions, it is important to examine the interplay between individuals and those close to them, including family while individuals experience major life changes, as well as transitioning from living at home during adolescence to emerging into adulthood (Lindell & Campione-Barr, 2017). People are usually vunerable to obstacles that are correlated with transitioning to the next level of education (Arnold, Lu, & Armstrong, 2012).

Ecological Systems Theory and Human Service Professionals (Professional Environment)

Figure 3

Ecological Systems Diagram

Macrosystem-
State level
officials

Exosystem-
Training of Human
Service Professionals,
State Levle Policies for

Mesosystem-
Interdisciplina
ry Teams

Microsyste
m-
Individidua
ls direct
interactions
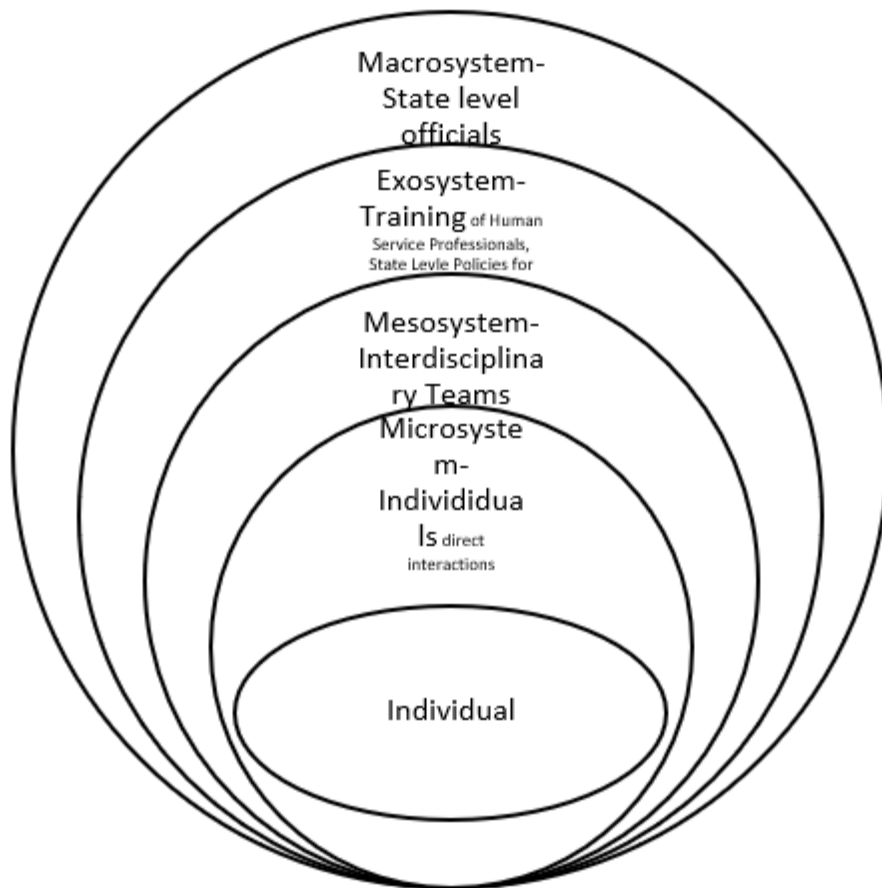
Individual

Individual Characteristics

     Human service professionals work to help improve the lives of individuals and their communities also while helping empower people to better their situation (Woodside et al., 2003). These individuals have a strong desire to help others (Woodside et al., 2003). Working with people with a disability allows the human service professional to

help address unmet needs (Russo-Gleicher & Bennet, 2011). Human service professionals that work with people with disabilities have the roles of caregiver, case managers, intermediary, counselor, instructor, behavior analyst, consultant, liaison, advocate, community organizer, mobilizer, and administrator (Russo-Gleicher & Benner, 2011).

Women are most often found to work in the human service field with a mean age in the mid to late thirties (Dempsey & Arthur, 2002). Women are more likely than males to pursue a degree in human services or social work (Dice & Renfuss, 2017). Many professionals were white women with black women being the next most common race/ethnicity (Park et al., 2009). Human service professionals are most often found working in the Southern states in government agencies, home care agencies, private companies, and health insurance companies (Park et al., 2009). Human service professionals that work in the field of case management most often have degrees in social work and rehabilitation counseling (Park et al., 2009).

Microsystem

The microsystem for the human service professional includes those that the human service professional interacts with daily. In this system the immediate settings are considered including their home, the workplace, and other community environments that they interact within (Bronfenbrenner, 1977). The co-workers of the professional also play an important role in the professional's life because they have direct experiences and direct social interactions (Neal & Neal, 2013).

Mesosystem

Examples of the interaction that human service professionals have at the mesosystem level includes involvement in interdisciplinary teams and person-centered. Interdisciplinary teams consist of a group of people from different support professions that work together to share their knowledge and skills that will help benefit the person (Nancarrow et al., 2013). Collaboration is an important part of the team process (Nancarrow et al., 2013) which is something that the human service professional does almost daily. Teams can consist of such professionals as therapists, case managers, support providers and behavior analysts. Person-centered planning is a systemic method for generating a workable understanding of an individual with a disability (O'brien & O'brien, 2000). Person-centered planning is often facilitated by the human service professional.

Exosystem

For human service professionals, the exosystem level includes issues and federal policies that they must follow as part of their professional role (Hirano et al., 2018). Such issues as fiscal barriers and agreements across agencies that have an influence on services (Odom, et al., 2004). Policy development and training of the human services professionals can also be found at this level. This could also include a promotion for the spouse of the professional that would cause the spouse to work longer hours.

Macrosystem

The macrosystem for human services professionals are often things that they may not have control over. Services are governed by federal policy which determines the

procedures for content and contexts (Ruppar et al., 2017). This setting includes the federal law and state policies that the human service professional must follow, such as rules for governance, continuing education, and services. Human service professionals work with multiple organizations to deliver quality care across various levels (Park & Huber, 2009). Administrators within the field determine when and how services will occur (Rouse et al., 2005). State agencies are responsible for providing oversight and support of programs providing services to individuals (Rouse et al., 2005). The nature of relationships among agencies can have an impact on the relationships among agencies at the local level (Rouse et al., 2005). Each of the actions made by governing administrators have a direct effect on the human service professional.

Chronosystem

Human service professionals assist their clients in exploring their problems which also influence the lives around them such as their significant other and children (Johnson & Bonner, 2013). Changes throughout time have an impact on the human services professional's role in all systemic levels (Chan et al., 2018). As the need of clients change human service professionals engage in work at the local, state, and national levels to maintain best practices (Becker & Todd, 2018). The time concept refers to time that is historical, family time, social time, and time that is individual which all have an impact on shaping the individual's development (Becker & Todd, 2018). Impactable events can divide life into a before and after (Becker & Todd, 2018).

Literature Review Related to Key Variables and/or Concepts

In the theoretical framework section, I discussed the historical components of systems theory and ecological systems theory. I detailed how the theory is used in the lives of students with disabilities and human service professionals. In the literature review section, I provided a definition of what an intellectual disability is and a review of the historical components of the deinstitutionalization movement and the move towards community integration. I also provided a review of the evolution of transition services in the United States by detailing the federal educational requirements for individuals with intellectual disabilities, employment related services and transition services for social skills development, independent living, and post-high school. In the next section I detailed the individuals that are members of the transition team and their roles. Lastly, I discussed the role of the human services case manager in the lives of youth with intellectual disabilities and the gaps found in transition services.

Individuals with Intellectual Disabilities (IID)

An intellectual disability is described as having deficits in mental capabilities that results in impairments in adaptive functioning during the developmental period (American Psychiatric Association, 2013). Adaptive functioning includes personal independence and social influence in at least one activity of daily living such as communication, social skills, academic or employment activities, and personal independence in the home or community (APA, 2013). The intelligence quotient cut-off to be diagnosed with an intellectual disability is 70 or less (Anderson et al., 2019). A

diagnosis of having an intellectual disability is confirmed by clinical and standardized intelligence testing (APA, 2013).

In 2015, there were 630,000 people in the United States with intellectual and developmental disabilities receiving services which cost over $25.6 billion for waiver programs (Friedman, 2017). This equals $39,989 per year per person (Friedman, 2017). Medicaid Home and Community Based Services waivers are the greatest funding source for services for people with intellectual and developmental disabilities (Friedman, 2017). The Home and Community Based waivers allow states to provide community-based programs to people that normally would require institutional care (Friedman, 2017).

Youth with Intellectual Disabilities

According to federal guidelines, transition services are to be provided to youth aged 16 to 22 who are diagnosed with intellectual disabilities (Mello et al., 2021). There were approximately 6.5 million children in 2015 with intellectual disabilities and approximately 600,000 were receiving state services (Larson et al., 2017). State services provided for youth with an intellectual disability cost overall $18,009 per year for those 21 years old or younger (Larson et al., 2017). Youth that reside with their family cost the state $14,323 annually (Larson et al., 2017).

Youth with intellectual disabilities have the poorest employment outcomes among youth with disabilities (Kaya, 2018). The factors that have an influence on the employment outcomes for youth with intellectual disabilities are needed (Kaya, 2018). Forty-six-point one percent of male youth and 33.5% of female youth that received special education went on to gain employment after high school (Kaya, 2018).

Researchers have shown that racial ethnic groups face more challenges in their everyday lives and gain less experience in school than white Americans (Kaya, 2018). African American youth have higher prevalence rates for having an intellectual disability than white youth and their chance of being employed after high school are lower than for whites (Anderson et al., 2019). Approximately 49.1% of white male youth that received special education achieved competitive employment after high school while only 43.5% of other races achieved competitive employment (Kaya, 2018). It is important for human service professionals to understand that each youth with a disability may have different characteristics and needs and planning for secondary education and transition services should be based on the individual needs of each student (Kaya, 2018).

Deinstitutionalization and Normalization

Deinstitutionalization started in the 1950s in England and the United States due to a need for change in psychiatric care and new policy reform for mental health (Novella, 2010). Another push for change was the controversial living conditions that patients were experiencing in mental asylums (Novella, 2010). The deinstitutionalization movement included a push for services to be provided in the least restrictive environment so that individuals with disabilities would have similar opportunities to their peers (Bredewold et al., 2020).

During the 1960s and 1970s the deinstitutionalization movement was centered around policies regarding the treatment of mental health (Perry, 2016). The movement resulted in thousands of people with mental illness that resided in long-term facilities (institutions) to be moved to less restrictive, and more normalized, community

placements (Chowdhury & Benson, 2011; Perry, 2016). It was believed that the behavior

of patients in state institutions was an unavoidable adaptation to the expectations that

staff and of the experiences that patients had (Perry, 2016). Patients adapted their

behavior in response to the control measures used by staff and this resulted in behaviors

that were not socially acceptable by the community (Perry, 2016). When behavior was

changed to that which would not be functional in the community, the individuals then

were kept in the institution to "protect" society which was a never-ending cycle.

Advocates indicated that it would be better to treat mental illness in the community, when

possible, to avoid this.

The daily population of mental health institutions in 1955 was 590,000 and the

total had decreased by 95% by 1995 (Perry, 2016). The overall movement was believed

to provide more compassionate and effective care for people with mental illness and

services were expected to be provided at a lower cost for the taxpayer (Perry, 2016). The

rationale for closing the institutions was based on the documented benefits of community

living, the use of the home and community-based waiver, and the increased costs of

maintaining the state institutions (Chowdbury & Benson; Jones & Gallus, 2016).

There was a strong emphasis on prevention and rehabilitation and a major concern

for social inclusion for those with mental illness and disabilities (Novella, 2010). The

goal of social inclusion is to strive for participation in typical workplaces other than

sheltered workshops however, the task is hard to accomplish due to the characteristics

and capabilities of people with intellectual disabilities or a psychiatric condition, lack of

supportive staff, or negative elements in society (Bredewold et al., 2020). The evaluation

of community-based support for people with intellectual disabilities versus the state institutions that they replaced, showed that the community-based services superior (Mansell, 2006). The positive effects of deinstitutionalization are people live in lesser restrictive environments, improvement in self-care, independent living, self-direction, taking responsibility, and an increase in social skills and interactions with others without disabilities (Bredwold et al., 2020).

Education for Individuals with Intellectual Disabilities

Once the deinstitutionalization and normalization movement took hold, parents of youth with intellectual disabilities formed advocacy groups for their children demanding to be treated like "normal" children and youth around the 1940s (Perry, 2016). This included educational experiences and opportunities that individuals without disabilities had access to. *The Individuals with Disabilities Act* (IDEA) entitles all children with disabilities in the United States from infancy to adulthood have a free (and appropriate) public education including through early intervention and special education services throughout age 21 (Lipkin & Okamoto, 2015). The act was passed in 1975 due to public belief that states were not providing adequate public education to children with disabilities (Lipkin & Okamoto, 2015).

There are six key requirements of the IDEA: free public education, identification and evaluation, individualized education, least restrictive environment, due process, and parent and student participation with shared decision making (Lipkin & Okamoto, 2015). States are required to provide free and appropriate education to all children with services personalized to meet their individual needs (U.S. Department of Education, n.d.). States

need to ensure that the rights of both youth with disabilities and their parents are protected (U.S. Department of Education, n.d.).

The act assists states, local agencies, educational services, and federal agencies to provide education for all youth with disabilities (U. S. Department of Education, n.d.). The IDEA assists in comprehensive, multidisciplinary systems of early intervention for infants and toddlers with disabilities and their families (U.S. Department of Education, n.d.). Services should be provided in the least restrictive environment along with children without disabilities (Lipkin & Okamoto, 2015). Procedural safeguards should be provided to children and their parents for rights and appeal processes (Lipkin & Okamoto, 2015). Schools should collaborate with parents and students in facilitating the student's services (Lipkin & Okamoto, 2015).

Implementation of the IDEA is monitored by the US Department of Education (Lipkin & Okamoto, 2015). The IDEA states that the planning of services must be individualized and set to the student's wants, needs, and strengths, and include the post-secondary goals which are documented in the individualized education plan (Trainor et al., 2016). Courses must align with the goals listed in the individualized education plan and progress should be documented regarding the post school goals on an ongoing basis (Trainor et al., 2016). The IDEA compliance reports are due to the government on an annual basis (Trainor et al., 2016). Based on the mandates of IDEA transition services universal and individualized and may lead to a more independent life in adulthood (Mello et al., 2021). Services that are universal and individualized appear to facilitate successful

post school outcomes leading to a more independent life in adulthood (Mello et al., 2021).

Transition Services

Transition services are a vital component of the educational experience of youth with disabilities (Poppen, Sinclair, Hirano, Lindstrom, & Unruh, 2016). Transitioning into adulthood can be challenging for youth with intellectual disabilities experiencing uncertainties regarding post-secondary outcomes, work, and the possibility of living independently (Austin et al., 2018; Papay & Bambara, 2014). Transition services include assessment, planning, and instruction (Trainor, Morningstar, & Murray, 2016). The areas of focus are programs in education, employment, and independent living (Dawalt et al., 2020). These services are provided to support the students in enhancing the skills and experiences considered to be necessary post school (Bouck & Joshi, 2016).

 Federal law requires that transition services be provided to students receiving special education services by their sixteenth birthday (Cimera & Vaschak, 2015). To prepare students for the transition from high school to their adult roles, administrators are encouraged to engage the families and adult providers in assisting the student to attain their post school goals by using the individualized education program (Hirano et al., 2018). Transition services/education that are universal and individualized appear to facilitate successful post school outcomes leading to a more independent life in adulthood (Mello et al., 2021).

Transition Services: Employment. Youth with intellectual disabilities have the poorest results regarding transition outcomes (Kaya, 2018). These students have

historically been known to be chronically unemployed and to have the poorest vocational outcomes (Cimera & Vaschak, 2015). Social isolation risk is high for those with disabilities that have a deficit in social skills during transitions (Dawalt et al., 2020). Moreover, their capabilities have often been mischaracterized or misunderstood (Gormley, 2015).

The Americans with Disabilities Act of 1990 made it unlawful to discriminate against individuals in employment situations and requires employers to provide reasonable accommodations to employees with disabilities (Rosner et al., 2020). School-to-work programs are a key aspect of effective transition planning by preparing youth for competitive employment (Gormley, 2015). Employability skills training for the specific occupation they are seeking has also been found to be beneficial for youth with intellectual disabilities (Yildiz & Cavkavtar, 2020). Post-secondary interventions that include employment skills can benefit employment outcomes (Qian et al., 2018).

The stigma experienced by individuals with intellectual disabilities that are working age most often occurs when they are seeking competitive employment and they are sometimes regarded as unemployable (Gormley, 2014). Youth with disabilities often need specialized transition planning services that not only include employment skill training but also training in the areas of social skills and self-advocacy (Dawalt et al., 2020). There remains a need for a better understanding and further research on how to improve employment outcomes for people with disabilities (Dawalt et al., 2020).

People with disabilities have a need for opportunities to develop the skills needed beyond high school to assist with challenges when seeking employment (Qian et al.,

2018). Possible future issues with employment and social inclusion emerge most often during the transition to becoming an adult, which may continue throughout adulthood if they are not supplied with the tools to make this transition successfully (Wilson et al., 2017). The logical place for teaching social skills that are of high importance on the job and in adulthood is in high school, since there are several peers that are competent in socializing and can serve as positive role models (Agran et al., 2016).

The current U.S. labor market requires workers to possess knowledge and skills to help advance in the labor market (Qian et al., 2018). People with disabilities have a need for opportunities to develop the skills needed beyond high school to assist with the challenges when seeking employment (Qian et al., 2018). Earning a post-secondary degree or credentials provides opportunities to advance in the labor market for those with disabilities and for those without disabilities (Qian et al., 2018).

There have been programs and services developed to help with the process of learning the skills necessary for post-school employment that have been evaluated (Strater & Elfers, 2019). Project SEARCH is a program that offers a one-year work experience for transition aged youth with intellectual disabilities that are in their last eligible year of high school services (Strater & Elfers, 2019). It provides a full work experience through collaboration with local businesses, the school system, vocational rehabilitation agency, and job coaching. The experience provides linkages to service providers and connections for the youth to their local community (Strater & Elfers, 2019). The Project SEARCH program helps individuals with intellectual disabilities set and achieve their employment related goals. The challenges that participants received

training included communication, social competence in the workplace, the development of work skills, emotional control, and the act of seeing oneself outside of their work experience (Strater & Elfers, 2019). It was found that the interns experienced overall growth in their self-determination skills and themes of pride and independence developed (Strater & Elfers, 2019). It would be beneficial if more programs like this were available to youth with disabilities to learn the skills so they would have a better chance of securing gainful employment after high school.

Transition Services/Education: Social Skills/Relationships. Developing and maintaining relationships is considered one of the most important aspects of a person's life (Rose et al., 2021). The complex skills that are required when developing friendships can appear to occur naturally for some but for others it can be challenging (Rose et al., 2021. Being a friend requires skills in receptive and expressive language which also includes nonverbal cues (Rose et al., 2021). Sometimes people with disabilities display behaviors that are considered inappropriate in social relationships (Behroz-Sarcheshmeh, et al., 2017; Mello et al., 2021). The inappropriateness of the social skills can be a characteristic of their specific disability (Behroz-Sarcheshmeh et al., 2017). Inappropriate social skills can be a characteristic of a specific disability (Behroz-Sarcheshmeh et al.,2017). However, developing relationships during the transition into adulthood is vital for success in building social networks, attending college, living independently in the community, contributing to their community, and maintaining competitive employment (Mello et al., 2021; Rose et al., 2021).

Social skills are considered skills that allow an individual to have successful interactions with others (Behroz-Sarcheshmeh et al., 2017; Mello et al., 2021). Life skills training has been used to help promote social skills training for students with intellectual disabilities (Behroz-Sarcheshmeh et al., 2017). This training should include behavioral interventions that are centered around social learning principles focused on preventing and treating behavioral, emotional, and developing issues related to communication by increasing their knowledge, skills, and the concept of self (Behroz-Sarcheshmeh et al., 2017; Mello et al., 2021).

Due to the enormous amount of stress experienced in college it is critical that young adults with intellectual disabilities have personal strategies for managing stressful situations (Plotner et al., 2020). This period can be stressful for all students, however, youth with intellectual disabilities have a higher risk for severe stress (Plotner et al., 2020). Problem focused strategies have been found to be effective for helping young adults with intellectual disabilities cope with stressful situations involving romantic relationships, friendships, dealing with roommates, and social media (Plotner et al., 2020).

Skill acquirement should occur across the lifespan for all individuals with disabilities that struggle in transition areas (Rose et al., 2021). This is because different experiences may require new skills and responses and people with disabilities do not always adapt well to change. An example of this would be social skill deficits that occur most often in the post-high school years for students with intellectual disabilities as the environments they interact with others in has changed from school to employment

settings (Rose et al., 2021). The social skills that were appropriate for interacting with teachers and other students may not be appropriate for interacting with employers and customers. There is a need for social skills programs that are designed for individuals with intellectual disabilities throughout their lives (Rose et al., 2021).

Transition Services/Education: Independent Living. Youth with intellectual disabilities may have a lack of skills related to personal care and hygiene, self-determination, sexual education, and safety skills to prepare them for life outside of their parents' home (Yildiz & Cavkaytar, 2020). The deficits in functional independent living skills impedes their ability to live without the need for additional supports (Bridges et al., 2020). Independent living is an important signifier of adulthood (Bridges et al., 2020). There are systems set up to provide supported living arrangements and to promote independent living but there are also barriers that prevent people with intellectual disabilities from achieving independence (Bridges et al., 2020). Video modeling has been found to be an effective tool for teaching an array of self-care and independent living skills (Bridges et al., 2020). No matter how taught, independent living skills are not important for the day-to-day home life of an individual, but the lack of skills also can impact employment and relationships with others negatively.

Transition Services: **Post-High School Education.** Post-secondary education programs have been found to be beneficial in helping young adults learn to function in ways that lessen the needs for support while providing opportunities for engaging in meaningful activities (Prohn et al., 2018). Young adults with intellectual disabilities attend post-secondary institutions (community college, vocational school, college,

universities) less often than youth without disabilities (Grigal et al., 2014). There has

been an increase in opportunities for individuals with intellectual disabilities to pursue

higher education (Papay & Grigal, 2019). The increase is due to amendments to the

Higher Education Opportunity Act, (HEOA), which created paths to federal financial aid

for students with intellectual disabilities and due to a new demonstration program,

Transition and Post-Secondary Programs for Students with Intellectual Disabilities

(Papay & Grigal, 2019).

The Office for Civil Rights (OCR) enforces civil rights laws that prohibit

discrimination in programs that receive federal funding (U.S. Department of Education,

2020). Most schools and postsecondary schools in the United States must follow the laws

and requirements of Section 504 of the Rehabilitation Act of 1973 and Title II of the

Americans with Disabilities Act of 1990 which prohibited discrimination based on

disability (U.S. Department of Education, 2020). Section 504 protects the rights of

people with disabilities in federally funded programs (U.S. Department of Education,

2020). Section 504 covers the rights of people with visible disabilities and those without

visible disabilities (U.S. Department of Education, 2020). Providers of preschool

programs, day programs, and adult education cannot exclude people with disabilities and

are required to accommodate their needs when arranging services (U.S. Department of

Education, 2020).

Transition Teams/Involved in Transition Process

It is important to understand the individuals that are involved in the transition

period for youth with intellectual disabilities into adulthood, which includes their level of

support and collaboration (Plotner et al., 2017). Transition teams can consist of special education teachers, vocational rehabilitation counselors, transition specialists that are school based, adult agencies such as independent living centers or state developmental disability programs, and administrators (Plotner et al., 2017). Parents are also a vital component of the individualized education team, they help in the decision making and planning process for implementing special education services (Zagona et al., 2019).

According to the IDEA the transition meeting should consist of the individual, the local education agency, the parents, vocational rehabilitation counselors, state developmental disability programs, and/or disability services officers (Morgan & Riesen, 2016). To ensure that students with disabilities are prepared for adulthood schools may hire transition coordinators (Scheef & Mahfouz, 2020). Some of the key roles of the transition coordinator are outside of assisting with academic skills, leading program development, being an expert on resources, and facilitating community experiences (Scheef & Mahfouz, 2020). Transition team members need to be knowledgeable about their role and the role of others in order to provide services to youth with disabilities (Frazier et al., 2020). Each team member brings valuable resources to the planning process and are viable for providing opportunities for continued education, meaningful employment, and access to community resources and recreational activities for youth while transitioning into adulthood (Frazier et al., 2020).

Transition planning is a recent update in the special education field that is essential for helping people with intellectual disability to have a better quality of life (Ahmad & Thressiakutty, 2020). Transitions are a major phenomenon when the

individual moves from one stage into a new stage (Ahmad & Thressiakutty, 2020). Transition teams often lack training, access, and preparation in secondary transitions (Mazzotti & Plotner, 2016). Transition planning is sometimes insufficient due to a lack of info regarding the student's needs, interest, and level of intellectual functioning (Brendle et al., 2018). This can also be complicated if parents/guardians do not share the view of the student's future that the student has.

High school should prepare youth with intellectual disabilities, but many youths will require additional support and services after school (Morgan & Riesen, 2016). Movements from school to post school and employment placement are facilitated inconsistently by school personnel that lack knowledge of transition regulations, what services and supports are available, how to access those services, and a lack of understanding of how to carry out the transition process effectively (Karal & Wolfe, 2020). Students can face barriers to employment training while in high school if there are limited employment options available to them and they may not be provided information regarding career choices that may be available to them in because of preconceptions that members of their transition team have about their abilities regarding career choices that may be available to them in the future (Redhead et al., 2019).

Teachers

The main goal of secondary education is to provide students with the skills and experiences that are necessary to function as a self-sustaining adult (Readhead et al.,2019). Teachers should receive training to learn strategies to link academics to what students will be expected to do when on their own (Scott & Puglia, 2018). It is important

for teachers to understand their role in developing student skills related to activities of daily living and employment and providing experiences for the students with intellectual disabilities to practice these skills is essential to ensure a successful transition from school to adulthood (Karal & Wolfe, 2020; Scott & Puglia, 2018).

Special Education Teachers. Special education teachers facilitate the transition planning process in many school districts (Frazier et al., 2020; Scott & Puglia, 2018). They also assist the students in identifying their strengths and interests, receive training for success in their careers, and are provided access to resources, including support staff throughout the entire process (Scheef & Mahfouz, 2020). They also support the overall academic and social needs of youth with disabilities and work with other students to ensure these needs are met (Scheef & Mahfouz, 2020).

Before the individualized education plan meeting, the special education teacher will gather information regarding the student's interests and prepare the student to be an active participant in their meeting (Wehman, 2020). At the meeting they present the student's performance information to the team and record the items discussed at the meeting and the final decisions (Wehman, 2020). After the meeting the teacher will write the plan, monitor the implementation of the plan, and provide follow-up to the team members (Wehman, 2020).

Mainstream Teachers. Mainstream teachers typically teach students without disabilities and a few with disabilities (Kugelmass & Kuperberg, 2020). Mainstream teachers provide observations of the student's activities in the general curriculum (Wehman, 2020). The mainstream teacher will also identify ways that the student can

access the general education curriculum and provide instruction to the student (Wehman, 2020). These teachers need to participate in the individualized education plan meeting and review and follow the individualized education plan (Rotter, 2014). They work with the special education teacher to develop relevant goals, academic achievement, and functional performance which helps with classroom planner (Rotter, 2014).

Work Experience Coordinators/Teachers. It is critical to provide "real world" work experiences for youth with intellectual disabilities schools that they have had an opportunity to develop job skills before graduating high school (Whittenburg et al., 2019). Providing students with high quality work experiences is a key factor in quality successful outcomes post school (Whittenburg et al., 2019). It is important for youth with intellectual disabilities to have experience or training in the field because the act of developing work experiences within the local community can be difficult without the support of transition specialists and educators (Whittenburg et al., 2019).

During the transition planning, students and their team identify employment experiences and the skills that they will need to develop before and during those experiences (Readhead, 2019). Vocational services are provided to youth with intellectual disabilities and can include career counseling, vocational assessments, and supported employment /job coaching (Kaya, 2018). Vocational assessments focus on identifying level of ability, skills, and necessary supports and services (Bendle et al., 2018). They are also useful in determining self-help ability, level of academic functioning, level of social support required, and the physical ability of the individual (Bendle et al., 2018; Kaya,

2018). This information can also be used to determine post-high school employment programs that would be appropriate for the individual.

Parents/Guardians

Parents/guardians are members of the individualized education planning team and are vital to the processes, planning, and implementation of special education and transition services (Zagona et al., 2019). Parents have a unique insight into their child's life and can influence the child's values and decisions regarding their future (Wehman, 2020). The insight of the parent has a strong role in supporting the child throughout the process of transitioning into adulthood (Wehman, 2020). The parents, in conjunction with the student and special education teacher, should contribute to the goals of the plan (Cavendish et al., 2017). Parents also should be given an opportunity to ask questions and have a final say in the plan (Cavendish et al., 2017).

External Service Providers

After completing high school, youth with disabilities must navigate a system of support that is divided and each of those agencies has their own eligibility requirements and avenues for funding (Honeycutt & Witten burg, 2016). State agencies play a major role in the transition process by providing opportunities for professional development (Plotner et al., 2017). Adult service providers include state vocational programs, pre-employment transition services, case management, independent living counselors, speech language pathologists, and other administrators (Wehman, 2020). Each provider brings an area of expertise to the team and should be involved in the transition team to provide

information to other members and to ensure that there is a seamless transition between high school and post-high school services (Goran et al., 2020).

Vocational rehabilitation services. The Rehabilitation Act stresses the importance of collaboration between state vocational rehabilitation and education agencies (Morgan & Riesen, 2016). State vocational rehabilitation workers participate in the planning process by identifying services and supports that are available for the student in the present and in the future by adult service providers (Wehman, 2020). Vocational rehabilitation services are available to students from the age of 14 through 21 years of age (Wehman, 2020). Pre-employment training consists of job exploration, workplace readiness training, counseling regarding postsecondary training, self-advocacy instruction, and work-based learning experiences (Wehman, 2020).

Speech-language pathologists. Speech-language pathologists play an important role in teaching transition skills to youth with intellectual disabilities if there are any issues with verbal communication (Frazier et al., 2020). They focus on communication as a means for success in the academic world (Frazier et al., 2020). Speech pathologists are focused on developing language and communication skills (Goran et al., 2020). They guide the transition team on considering the required skills for adult living, employment, community participation, and adult social roles (Frazier et al., 2020).

School counselors. School counselors can help lead transition teams (Frazier et al., 2020). School counselors provide the team with details regarding course options, career assessments, schedules, class placement options, and counseling services

(Wehman, 2020). The counselor also provides consultations and coordinates services in the school setting (Wehman 2020).

Human Services Case Manager

One important member of the transition team is the human services case manager (Bogenschutz, Dinora, & Johnson, 2019). Case managers are considered frontline providers that work daily in the lives of people with disabilities in their homes, community, and provides social support, employment services, outpatient services, and an array of issues (Stanhope et al., , 2016). Case management is the process for assisting an individual with receiving and monitoring their services (Bogenschutz et al., 2019). Case managers play a major role in how services are perceived and communicated for the people they support (Stanhope et al., 2016). The case manager has a fundamental role in supports when working with people with intellectual disabilities (Bogenschutz et al., 2019). Successful interventions are dependent on the case manager's ability to influence a change within relationships both personal and professional, working to meet the wants and needs of the person with intellectual disabilities (Fennessy et al., 2015).

Human Services Case Manager Roles & Responsibilities.

Collaboration. In some states the case manager operates at the state level and in other areas they operate at the county level, but ultimately are governed by the state (Bogenschutz et al., 2019). It is a requirement that state level vocational programs implement partnerships with local and state agencies, career development centers, post-secondary institutions, and other service providers that help youth and adults with disabilities access and employ outcomes in transition (Fabian et al., 2016). Inter-agency

collaboration has been found to be one of the most effective practices for transitions from school to adulthood for people with disabilities (Fabian et al., 2016). Fabian et al. (2016) concluded that collaboration did improve transition outcomes, but transition teams need to define who the key members need to be and what it is that they plan to accomplish.

Access to Services & Funding. Case management is usually the single point of entry into the state's services for people with intellectual disabilities (Bogenschutz et al., 2019). The case management organization will provide services to a specific area for a county, city, or multiple localities (Bogenschutz et al., 2019). Each case management organization is funded by state and local funds (Bogenschutz et al., 2019). The services are provided by a local organization or contracted with a private organization (Bogenschutz et al., 2019).

Medicaid is the primary funding source for services in the United States for people with intellectual disabilities (Walker, 2014). Case management is part of the Medicaid state plan, and it is not a service on the HCBS waiver (Walker, 2014). The case manager links the individual to health, educational, therapeutic, behavioral, and social support services (Walker, 2014). Each setting that the individual receives services can involve a different funding source (Walker, 2014). Some case management is provided to youth in a school setting in conjunction with the IDEA (Walker, 2014). Individuals that receive case management do so by being a part of a targeted group, those with intellectual and developmental disabilities (Walker, 2014).

Coordination of Services. It is of high importance that the types of support available in the community be examined to ensure that each individual intellectual with

disabilities is being provided the necessary tools that they need to be successful (Friedman & Spassiani, 2017). Services that aid people with intellectual disabilities to be successful in the community include community transition services and community integration services (Friedman & Spassiani, 2017).

State vocational rehabilitation agencies have an important role in helping youth aged 16 to 24 attain their career goals by offering training and funding for higher education programs (Honeycutt et al., 2015). The vocational rehabilitation programs are required to collaborate with state agencies to plan and provide services for students with disabilities (Honeycutt et al., 2015). The vocational rehabilitation workers are expected to have goals and programs for transition-aged youth (Honeycutt et al., 2015).

Gaps in Transition Services for Youth with Intellectual Disabilities and The Human Services Case Manager

Further research was needed to determine the perspectives of human service case managers on transition services for youth with intellectual disabilities. The transition period from youth services to adult services is a global issue that can lead to adverse outcomes if handled subpar (Kerr et al., 2020). The services provided to youth with disabilities still lack compared to those provided to students without disabilities (Bakken & Obiakor, 2019). Students with learning disabilities report that they are unsure about their futures (Bakken & Obiakor, 2019).

Transition services should occur frequently and ongoing for youth with disabilities to prepare them for the next stage (Bakken & Obiakor, 2019). There are several obstacles to overcome and challenges that need to be addressed while going

through the educational system (Bakken & Obiakor, 2019). Students need to be able to effectively transition to the next grade level, to post-school, and have an active role in transition planning (Bakken & Obiakor, 2019). Transition teams usually consist of the teacher, the student, their family or guardian, and other school personnel (Bakken & Obiakor, 2019). There is no mention of the human service case manager in the planning process although they are necessary as they are important in bridging the transition from school to adult life (Hirano et al., 2018).

Youth transition services are set to end at the age of 22 and without coordinated services and support services in place for when those school supplied services end, youth with intellectual disabilities will go without the proper tools and information that is needed to transition to adulthood effectively (Bolourian & Blacher, 2018). Youth with intellectual disabilities who go on to post-secondary education need assistance in navigating throughout the vocational school or college experience (Bolourian & Blacher, 2018). Post-high school youth and young adults with intellectual disabilities often have difficulty finding employment that is appropriate for their skills and provides a "living" wage (Bolourian & Blacher, 2018). Individuals with intellectual disabilities that work often receive lower wages and fewer hours and often have difficulty interacting in social settings which has an impact on the lack of success in the employment setting (Bolourian & Blacher, 2018). This shows the need for comprehensive transition services for youth with intellectual disabilities as they move from youth services into adulthood (Talapatra, et al., 2018) with the assistance of a human service case manager to tie all those services together.

Summary

Transitioning into adulthood can be challenging for youth with intellectual disabilities as this process can bring forth many uncertainties when considering post-school, work, and living independently (Austin et al., 2018; Papay & Bambara, 2014). Transition services are vital youth with disabilities and U.S. federal law has required that transition services be provided to all students receiving special education services by the age of sixteen (Cimera & Vashak, 2015). Programs have been created to help youth prepare for competitive employment and post-secondary programs but there are often gaps in the services provided which can leave these youths unprepared for life as an adult which can then lead to them not being successful (Strater & Elfers, 2019; Dawalt et al., 2020; Prohn et a., 2018).

Researchers have mainly focused on the type of services available to youth with intellectual disabilities when transitioning into adulthood (Dawalt et al., 2020; Strater & Elfers, 2019; Quian et al., 2018; Yildiz & Cavkavtar, 2020). Authors have detailed the need for services that are individualized, that address deficits, and help develop skills (Mello et al., 2021; Dawalt et al., 2020; Trainor et al., 2016). However, there is no known researchers who have examined the perspectives of human service case managers who work with youth with intellectual disabilities regarding the services that are available and those that are needed to support the individual and make the transition into adulthood successful. Chapter 3 includes an overview of the qualitative approach, detailing the major sections, the research question, the design, the role of the researcher, and the methodology.

Chapter 3: Research Method

Introduction

The purpose of this generic qualitative research design study was to further understand the perspective of human service case managers who work with individuals with intellectual disabilities regarding services that are available and those that are needed in order to support the individual and make this transition to adulthood successfully. This chapter describes the research design and rationale, role of the researcher, and the methodology.

Research Design and Rationale

The research questions were:

RQ1: What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not effectively provided to these individuals to help with the transition between high school and adulthood?

RQ2: What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge any gaps in transition services already offered by public entities? To answer these research questions, I conducted a generic qualitative research study.

I used generic qualitative research to investigate opinions, attitudes, beliefs, or experiences of participants (Percy et al., 2015). The generic qualitative research design allowed more flexibility in relation to the process of information collected qualitatively

than the other more traditional qualitative research designs such as ethnography, grounded theory, case study, phenomenology, or narrative research. (Bellamy et al., 2016).

Ethnography is used to investigate network of social groups beliefs and behaviors that define a culture (Percy et al., 2015). This method of inquiry examines how culture explains the behaviors and perspectives of a group (Patton, 2015). The researcher becomes immersed in culture (Patton, 2015). This method was not appropriate because I did not investigate a culture or a group to immerse myself in (Bellamy et al., 2016). Grounded theory uses data collected to develop a new theory related to the phenomenon being studied (Percy et al., 2015). It is based on building a theory instead of testing a theory (Patton, 2015). This approach was not appropriate for the study because I did not develop a theory.

Case studies are used to investigate a single case by using multiple methods and sources of data collection (Percy et al., 2015). The case study is often viewed as a product, standing on its own (Patton, 2015). It is an in-depth story of an individual, organization, event, or program (Patton, 2015). Case studies are most often used in the field of evaluation providing an in-depth analysis (Creswell & Creswell, 2018). This approach was not appropriate because I did not study a single participant (or multiple participants) in depth, but only asked questions related to the topic studied. Phenomenology is used to investigate the lived experiences of participants (Percy et al., 2015). It is used to capture the participant's experiences related to a specific event

(Patton, 2015). I did not study participant experiences to a specific event, so this method was not appropriate.

Narrative research is a retelling of participant stories (Creswell & Creswell, 2018; Patton, 2015). The researcher analyzes the participants stories to understand their experiences (Bellamy et al., 2016). This method of inquiry was not appropriate because I did not gather data through storytelling or narrating experiences (Bellamy et al., 2016).

Generic qualitative research is an effective strategy for making sense of shared information from participants without being bound by the rules of the other qualitative research designs (Liu, 2016). Many are drawn to this method of inquiry because it fits well with several other frameworks and it is not tied to the same rules of a methodology that other qualitative research designs need to adhere to (Kennedy, 2016). One important feature is that it is methodologically flexible (Liu, 2016). The participant can be reflective as they answer the researcher's questions and there is more latitude for the researcher to be able to probe for information (Percy et al., 2015). It places emphasis on the participant's point of view rather than the underlining meanings (Bellamy et al., 2016). Generic qualitative research is most appropriate for studies that are examining the individual's perceptions and/or opinions as well as their knowledge which is what I attempted to gather in this study (Percy et al., 2015).

Role of the Researcher

My role as researcher in this study was that of observer-participant. The observer as participant role is beneficial, because it allows the researcher to record events as they occur (Creswell & Creswell, 2018). The researcher collects the data and actively

participates in the interview sessions by interacting and communicating with the

participant (Karagiozis, 2018). The researcher's role is influential since they are a part of

the interaction they are attempting to investigate (Karagiozis, 2018). The qualitative

interviewer focuses on understanding how the participant interprets their individual lives

and lived experiences (Karagiozis, 2018).

Moral conflicts can occur even in the most organized studies, and they often go

unrecognized by the researcher (Karagiozis, 2018). It is important that the researcher is

aware of the ethical issues, the resources that are needed to complete a study, the required

time frame, and the barriers involving logistics that may occur during the study (Bellamy

et al., 2016). I tried my best to control my own perceptions and biases while collecting

data and by following clear strategies for being aware of the biases (Liu, 2016). Part of

this process included clarifying the biases that I may have brought to the study (Creswell

& Creswell, 2018). Self-reflection is one way to identify, track, and counteract personal

biases during a qualitative study (Creswell & Creswell, 2018).

I have previously worked as a case manager in the human services field and used

different reflexivity techniques to lessen my own biases and values while interpreting

data (Creswell & Creswell, 2018). Reflexivity is the act of reflecting on the thoughts,

feelings, and biases which may impact the study and shape interpretations of the results

(Creswell & Creswell, 2018). I completed field notes while conducting the interviews

(noting thoughts as they occurred), and as I went through the process of analyzing the

data in order to determine if I had any biases that influenced analysis and interpretation of

the data. I referred to the notes that I recorded when conducting the interviews throughout

the time that I coded the data. I continued to refer to the interview field notes, as well as

the field notes I recorded as I am coded the data, as I determined themes in the data

analysis in Chapter 4 and interpreted the data in relation to the theoretical framework and

literature reviewed in Chapter 5. I avoided having any type of previous relationship with

the participants as I did not recruit participants that I knew professionally or personally.

Methodology

Participant Selection Logic

Population

The population for this study was human service case managers that work with

transition age youth with intellectual disabilities. There are approximately 417,600

human service professionals that worked in the field in the United States (Bureau of

Labor Statistics, 2022). Human service professionals help to meet the needs of people

through an interdisciplinary approach (National Organization for Human Services, 2021).

They most often work in governmental social service agencies or other private or

publicly funded social service organizations (National Organization for Human Services,

2021). Human service professionals that work with people with disabilities most often

help the people they support to live as independently as possible as adults (Bureau of

Labor Statistics, 2022). This includes transition age youth with intellectual disabilities as

this is part of the preparation to live independently as an adult.

Sampling Strategy

I used purposeful convenience sampling and snowball sampling as the sampling

strategies. Purposeful sampling is a sampling strategy that is used when the participants

selected to be included in a study have the knowledge and experience of the phenomenon that the researchers are studying (Patton, 2015). When using purposeful sampling the researcher wants to gain insight and must then select participants that they will be able to learn the most from (Merriam & Tisdell, 2016). Purposeful sampling provides information rich cases while convenience sampling is based on time, location, and availability of the participants (Merriam & Tisdell, 2016). Convenience sampling is sampling those that are easy to reach (Patton, 2015). However, convenience sampling can also result in a sample that is skewed which could negatively affect generalizability of the results (Merriam & Tisdell, 2016).

Snowball sampling is when participants, or others who see the recruitment materials, are encouraged to send the recruitment materials to others who may qualify to participate in the study (Patton, 2015). Snowball sampling can be most effective when generating a sample via the internet or social media (Patton, 2015). Snowball sampling allows the researcher to gain access to additional participants by using their natural network of people that could also provide valuable information for the study (Patton, 2015). Snowball sampling could possibly lead to sampling bias as well as the sample may also be skewed. However, the sampling strategies are considered limitations of the study (Chapter 5) and will be addressed in the recommendations for future research as well.

Inclusion/Exclusion Criteria

The inclusion criteria for this study were:

- The individual provides human service case management services to individuals with intellectual disabilities in transition between high school and adulthood.

- They have worked for a human service organization for at least 6 months providing human service case management services to individuals with intellectual disabilities in transition between high school and adulthood.

- Are at least 18 of age.

- Read, speak, and understand English.

- Potential participants were excluded from the study if they did not meet all the inclusion criteria listed above.

Sample Size

Qualitative studies often have smaller samples, and the sample size needed depends on the type of qualitative design used (Creswell & Creswell, 2018). I used data saturation to determine when to stop recruiting which occurred when no new information appeared during the interviews and no new themes emerged (Bellamy et al., 2016). Once I believed that I had reached data saturation, I communicated with my committee chair who looked at the interview transcripts and preliminary data coding, and then worked with the rest of the committee to determine if they agreed I had reached saturation or if additional interviews were needed. I anticipated that eight to 15 interviews would be completed to reach saturation.

Recruitment

Potential participants were recruited through the Walden University Participant Pool as well as through social media groups that are specifically for human service professionals and do not require permission to join or recruitment materials (see Appendix A). The sites that were used can be found in table 1 below.

Table 1

Recruitment Locations

Platform	Group	Link
Facebook	A Love for Special Learning	https://m.facebook.com/ALoveforSpecialLearning/
Facebook	Dissertation Survey Exchange	https://www.facebook.com/groups/post.survey.find.respondents.study.participants/ref=share
Facebook	Qualitative Research Group	
Facebook	Research Survey Exchange Group	https://m.facebook.com/groups/1376853029260212/?locale2=en_US
Facebook	Walden University Online Social Work and Human Services Degree Programs	https://www.facebook.com/groups/1571608729627101/?ref=share
LinkedIn	National Human Services Assembly (NHSA)	https://www.linkedin.com/authwall?trk=gf&trkInfo=AQF_1aqE4p3AogAAAXylZ3u4x4Vwz_CCKZ0jG7aWRxHL134YCE5R3fHElFX1j9CexD5DaEQ1GXNPJa1EPsAwaC_5MxxUm9Yjg6bohGcD3-Z4eGZ_YYSxs7kIYj9wSqrPL2YyVNw=&originalReferer=&sessionRedirect=https%3A%2F%2Fwww.linkedin.com%2Fcompany%2Fnational-human-services-assembly
LinkedIn	Human Service Forum	https://www.linkedin.com/mwlite/company/human-service-forum
LinkedIn	Survey Exchange	https://www.linkedin.com/groups/12056432
LinkedIn	Research Participant	https://www.linkedin.com/groups/12632001
Walden University	Participant Pool	https://academicguides.waldenu.edu/research-center/research-ethics/participant-pool

I recruited participants after Walden University IRB approval was granted. The recruitment materials (see Appendix A) were posted to the sites found in table 1. The recruitment material information included a description of the study, inclusion criteria, and the researcher's contact information. Once I received communication from a potential participant, I asked them the screening questions (see table 2) to ensure that they qualified to participate in the study. If they phoned me, I asked them the questions verbally and if they emailed me, I sent them the questions via email. Those who met the inclusion criteria were emailed a copy of the informed consent form for their review and I sent them a list of dates and times in that email that I was available to interview them. I asked them to review the informed consent form and, if they consent, to respond to that email with the words "I consent" and the dates/times that worked for them to be interviewed. Once they had let me know the date/time that worked for them, I emailed them confirmation of the meeting time as well as the Microsoft Teams meeting invite for their interview and reminded them to keep a copy of the informed consent for their records.

Instrumentation

Screening Questions

Screening questions (see table 2) were asked to individuals who had contacted the researcher about participating in the study either via phone or email (depending on how the participant made their initial contact. Each of the following questions required an answer of "yes" for the individual to qualify to participate in the study and to move forward in the participation process.

Table 2

Screening Questions

#	Question
1	Do you provide human service case management services to individuals with intellectual disabilities in transition between high school and adulthood?
2	Have you worked for at least 6 months providing human service case management services to individuals with intellectual disabilities in transition between high school and adulthood?
3	Are you at least 18 of age?
4	Can you read, speak, and understand English?

Demographics

Demographic information was collected from my participants at the beginning of their interview. Interviews normally include questions that inquire about the participants demographics such as age, income, education, and number of years employed (Merriam & Tisdell, 2016), as well as gender and ethnicity (Creswell & Creswell, 2018). The demographics I included were gender, race, position employed in, years providing human service case management services, highest level of education, and if they had a child who ever needed transition services provided (see table 3). The question about if they have a child who ever needed transition services provided was asked as individuals who have had both the human service professional and parental experience relate to transition services may have different perspectives that other participants who only have the human service professional perspective.

Table 3

Demographic Questions

Question	Prompt
What is your gender?	*Male, female, prefer not to answer?*
What is your race?	*White, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander, Other, or prefer not to answer?*
What is your position title? NA	*(Open ended)*
How many years have you been providing human service case management services to individuals with intellectual disabilities? NA	*(Open ended)*
What is your highest level of education?	*Associate Degree, Bachelor's Degree, Master's Degree, Doctoral Degree?*
Do you have a child who ever needed transition services provided to them?	*Yes, no, prefer not to answer?*

Semi Structured Interview

Semi structured interviews were used because they offer more flexibility in data collection than structured interviews (Bellamy et al., 2016). The researcher participated actively by communicating with the interviewees during the sessions (Karagiozis, 2018). The interviews were facilitated by using a limited number of open-ended exploratory questions (Bellamy et al., 2016). The interviews lasted approximately 30 minutes to an

hour to minimize participant fatigue although the length of the interview depended on

how detailed the answers of the participant were (Adams, 2015).

The open-ended interview questions were created based on the literature reviewed

related to the topic, the researcher's experience in the field, and to answer the overall

research questions of the study. Open-ended questions were selected so that the

participants could provide longer and more detailed responses. Additional prompts were

developed to use if the participant did not provide enough detail to answer the question or

information that was not related to the question. Interview questions and prompts can be

found in table 4.

Table 4

Interview Questions & Related Prompts

#	RQ	Question	Additional Prompt
1		What is your role in the transition process for youth with intellectual disabilities?	*What specific things are you responsible for related to the transition process?*
2	1	What services are currently offered for youth with intellectual disabilities who are going through the transition process?	*Tell me more about__.*
3	1&2	What benefits do you feel these transition services offer to youth with intellectual disabilities going through the transition process?	*Tell me more about ____.* *Why do you believe__?*
4	1	Do you believe that these services that are being offered are meeting the needs of youth with intellectual disabilities who are going through the transition process? Why or why not?	*Tell me more about_.* *Why do you believe__?*
5	1	Do you believe there are gaps that exist in the services are currently offered for youth with intellectual disabilities that are completing the transition process? Why or why not?	*Tell me more about_.* *Why do you believe__?*

6	2	What additional services do you believe should be offered to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
7	2	What additional services do you believe should be offered? (*Ask only if they indicate additional services need to be offered #6)	*Tell me more about_.* *Why do you believe__?*
8	2	How do you feel transition services can better be provided to youth with intellectual disabilities?	*Tell me more about_.* *Why do you believe__?*
9	1	What are the barriers to accessing services for transition aged youth with intellectual disabilities?	*Tell me more about_.* *Why do you believe__?*
10	1&2	How do non-profit organizations provide services to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
11	2	How do non-profit organization services benefit youth with intellectual disabilities in the transition process?	*Tell me more about_.* *Why do you believe__?*
12	2	What additional supports that non-profit organizations provide would be beneficial to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
13	1 & 2	Please share with me any other thoughts that you have about the role that you, your agency, or nonprofits have in supporting youth with intellectual disabilities going through the transition process.	*Tell me more about_.* *Why do you believe__?*

Procedures for Recruitment, Participation, and Data Collection

Participation

The recruitment process described above was followed. Then the participants

were interviewed via Microsoft Teams. Microsoft Teams provides secure video

conferencing and has an option for recording (Microsoft, 2021). No in person interviews

were completed due to concerns related to the COVID-19 pandemic and because the interviews occurred during cold/flu season. The interviews were audio recorded for transcription purposes. I did not video record the interview (did not use the video option) as some participants did not feel comfortable with being on video. I took field notes throughout the interview.

Data Collection

I started the interview off by thanking them for their time and asking them a few icebreaker questions (see interview protocol in Appendix B). I asked them if they had any questions about the informed consent information that they indicated "I consent" to via email. If the participant chose to no longer give informed consent and participate, I thanked them for their time and ended the interview. Once I established some rapport, I asked the participant if I could start recording the interview. If the participants agreed, then I started the recording. If they indicated that they did not want to be recorded I thanked them for their time and ended the interview.

I let them know that they can ask me questions at any time if they wanted clarification about the question being asked in the interview. I then asked the demographic questions. After the demographic questions (see table 3 and interview protocol in Appendix B) were completed I asked the interview questions (see table 4 and interview protocol in Appendix B). If at any time the participant decided that they no longer wanted to participate in the interview I ended the recording and thanked them for their time. Any data collected for that participant was no longer used for the study and was destroyed.

While conducting the interview, I took field notes. The notes consisted of the thoughts that I had while listening to their answer to the item. Once the interview was completed, I thanked the participant again for their time and ended the recording. After the recording ended, I let the participant know what the next steps were in the process. I let them know that I would email them a copy of their transcript for them to review for accuracy. I also explained that when I send the transcript that I would like a response about the accuracy of the transcript within seven days of the email being sent to them. If the participant agreed that the transcript was accurate, they either let me know during that period or did not respond. I asked If they had any questions and answered any they may have had about the study and then thanked them again for their time before ending the call.

Rev.com was used to transcribe the interviews. Rev.com is a transcription service that converts audio and video into text (Rev.com, n.d.). A privacy/confidentiality agreement is included in Appendix C. Once I have received the transcribed interview, I reviewed the transcription for accuracy by comparing it to the audio recording and my notes. I sent a copy of the transcript to the participants.

Data Analysis Plan

After reviewing the transcripts, the coding process occurred. The data was input into Microsoft Excel which I used to track the data and codes throughout the coding and theming process. Coding is the act of assigning codes to the data for easy retrieval and to help the researcher group data by topic (Merriam & Tisdell, 2016; Saldana, 2016).

I used qualitative content analysis to code and group the data into themes. Content analysis is used to interpret text or video data (Frey, 2018). A conventional context analysis approach was used which includes initial codes emerging from the data (Frey, 2018).

Sequential steps were taken to employ multiple levels of analysis (Creswell & Creswell, 2018). Open coding was used which is identifying any data that can be potentially useful (Merriam & Tisdell, 2016). By assigning codes to the data categories codes were constructed (Merriam & Tisdell, 2016). I looked for reoccurring similarities within the data (Merriam & Tisdell, 2016). The categories were named based off the participants' wording, my interpretation of what was being said, and reflecting on the related literature (Merriam & Tisdell, 2016). Similar codes were then grouped into themes based on similarities between the codes (Saldona, 2016). The process resulted in patterns. Once saturation was reached, the interview questions were answered. I interpreted the responses of the participants in which they discussed their experiences regarding transition services for youth with intellectual disabilities.

Issues of Trustworthiness

What makes a qualitative study trustworthy is the design of the study and by following the guidelines that are accepted by the scientific community (Merriam & Tisdell, 2016). In qualitative research proof of reliability and validity is a requirement (Amankwaa, 2016). To ensure trustworthiness I ensured credibility, transferability, dependability, and confirmability.

Credibility

Credibility is that the data accurately matches the perceived reality of the participants who provided interview data (Merriam & Tisdell, 2016). I established credibility by accurately recording and transcribing the interviews. Credibility will be displayed by triangulation and member checks. Triangulation is the act of checking data sources at different times from those with differing perspectives (Merriam & Tisdell, 2016; Amankwaa, 2016). Triangulation increases the credibility of the study (Merriam & Tisdell, 2016). The participants were sent their transcribed interviews to review for accuracy through member checks (Amankwaa, 2016). Member checks were used to establish validity (Amankwaa, 2016). Saturation occurred after hearing the same information over and over in interviews, but I checked with my chair if I believed saturation was met to ensure that my committee also agreed that no more interviews needed to take place.

Transferability

Transferability is how well the results of the study can be generalized to others (Merriam & Tisdell 2016). This occurs when the researcher provides a rich, thick description of the participant characteristics and the data collected via the interview (quotes) (Merriam & Tisdell, 2016). Transferability was established by providing a detailed and thick description of the settings, participants, and findings of the study. I also use quotes from the participants using pseudonyms. The sample of the study was also carefully considered. By utilizing purposeful sampling transferability was also upheld (Merriam & Tisdell, 2016). Purposeful sampling is used to ensure that the participants

have data that can be used by the researcher to answer the research questions (Merriam & Tisdell 2016). Transferability was displayed by going into great detail regarding the steps taken to complete the study so that the results can be applied in other settings (Amankwaa, 2016).

Dependability

Dependability was ensured by providing consistent and reliable data and enough detail about the research process so that another researcher can duplicate the study (Merriam & Tisdell, 2016; Amankwaa, 2016) The researcher must show that the codes, themes, and results are consistent with the data (Merriam & Tisdell, 2016). Dependability can be ensured by use of triangulation, the researcher's position, and by utilizing an audit trail (Merriam & Tisdell, 2016). I used a variety of sources to show triangulation, such as documenting notes and interviews using a journal. I documented the participants' responses and thoughts, as well as my observations. Audit trails describe how the data was collected, how the themes were developed, and how the decisions were made during the study (Merriam & Tisdale, 2016).

Confirmability

Confirmability is replicability of the results by other researchers (Merriam & Tisdell, 2016). I established confirmability by providing a detailed description of the methodology. I also detailed the findings and interpreted the data and explained the themes that emerged. Triangulation is a method for providing confirmability. It includes using multiple data sources, also understanding the data from multiple ways (Amankwaa, 2016). Reflexivity also was used. This was achieved by creating and referring to a

reflexive journal and by making entries during the research process detailing the methodological decisions and reasons (Amankwaa, 2016).

Ethical Procedures

I received Institutional Review Board (IRB) approval before beginning recruitment. Once I obtained IRB approval, I posted the recruitment flyer (see Appendix A) to the sites listed in table 1 and the Walden participant pool. I followed the recruitment, informed consent, and data collection process as indicated previously in this chapter. The researcher did not have a relationship with any of the participants so that there were no coercion or dual roles with participants. The participants were able to withdraw at any time with no penalty to the participant. No incentives were provided for participation. The informed consent form was sent to potential participants before scheduling their interview for their review, they were asked to respond to the email with "I consent", and any questions about the informed consent were also asked before starting recording of the interview. No signatures were collected but their names may be included in the transcript if I used their name when interviewing them.

I used pseudonyms to refer to participants throughout chapters 4 and 5 of the dissertation and did not disclose the identity of the participants. The only individuals who knew the identity of the participants in connection to their interview recording and transcript was myself, my committee members, and the Walden University IRB if they asked to review my data. A standard confidentiality agreement from REV (transcription service) can be found in Appendix C. Participant information such as emails and phone numbers, interview recordings, and interview transcripts are kept on a password protected

computer. All data related to this study will be kept in a secure password protected location for 5 years after the study receives CAO approval. Any participant information, recordings, transcripts, and data will be destroyed after that time. After CAO approval of the study, I compiled a 1-to- 2-page summary of the study and results and posted them on the sites where I recruited to share information with those that may benefit from the study.

Summary

This chapter detailed the steps taken to conduct an ethically sound research study. I detailed the steps I took in regard to the research design and methodology. This section also included the interview protocol and interview questions. In chapter 4 I detail the introduction, setting, demographics, data collection, and data analysis. This chapter will conclude with the evidence of trustworthiness section, results, and a summary.

Chapter 4: Results

Introduction

The purpose of this generic qualitative study was to further understand the perspectives of human service case managers who work with individuals with intellectual disabilities in regard to services that are available and those that are needed in order to support the individual and make this transition to adulthood successfully. This project is unique because I was not able to find any other studies where the researchers examined the perspective of the human service case managers in regard to transition services for individuals with intellectual disabilities. The research questions that were addressed in the study were:

RQ1: What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not effectively provided to these individuals to help with the transition between high school and adulthood?

RQ2: What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge any gaps in transition services already offered by public entities?

In this chapter I discuss the settings, demographics, data collection, data analysis, evidence of trustworthiness, and the results of the study in relation to the research questions.

Setting

IRB approval was granted on April 21, 2022 (04-21-22-0537512). I posted

recruitment materials as indicated in Chapter 3. I did not receive any contact from

potential participants for approximately six weeks, so I completed a change in procedures

form with the IRB to have additional sites for recruitment approved. The change in

procedures were approved by the IRB on June 6, 2022. The additional sites that were

approved by the IRB for me to recruit through are in table 5 below. .

Table 5

Additional IRB Approved Recruitment Sites

Platform	Group
Facebook	A Love for Special Learning
	Dissertation Survey Exchange
	Qualitative Research Group
	Research Survey Exchange Group
	Walden University Online Social Work and Human Services Degree Programs
LinkedIn	National Human Services Assembly (NHSA)
	Human Service Forum
	Survey Exchange
	Research Participant

I completed the first interview on June 15, 2022 and the last was on September 7,

2022. I conducted the interviews via Teams. All procedures detailed in Chapter 3 were

followed. I had conducted nine interviews, but one was excluded from the data as the

participant was not a case manager who worked with individuals with intellectual

disabilities going through the transition process. The final sample size was eight

participants. I reached data saturation after eight interviews and confirmed this with my committee chair before completing data analysis.

Demographics

The sample consisted of eight human service case managers who were all from the Southern United States (Alabama, Florida, Texas, North Carolina). All participants were female and six were African American, one white, and one biracial (these will be addressed as limitations in chapter 5). Years of case management experience ranged from 2.5 years to 10 years and all participants had at least their master's degree (see Table 6).

Table 6

Sample Demographics

Participant	Gender	Race	Position Title	# of Years Providing Case Management	Highest Level of Education
1	Female	African American	Qualified Mental Health Professional	10	Masters
2	Female	African American	Support Coordinator	7	Masters
3	Female	African American	Lifecare Case Manager	2.5	Masters/ABD
4	Female	White	Facilitator of Beyond Program	15	Masters
5	Female	Mixed	High School Transition Facilitator	18	Masters
6	Female	African American	Vocational Rehabilitation Counselor	3.5	PhD
7	Female	African American	Case Manager	15	Masters
8	Female	African American	Certified Behavioral Health Case Manager	10	Masters

Data Collection

The eight interviews were completed via Microsoft Teams during June through September 2022. There were some challenges with accessing Microsoft Teams for some of the participants. I told the participants that the interviews would take approximately one hour but they only lasted from 9 to 33 minutes. The interview's length depended on the detail provided in the answers of the participants. Although some of the interviews were short in length, the data were sufficient due to the depth of the data shared in the short period of time. The participants were able to convey their answers to the question

more directly and concisely than I originally anticipated. This allowed me to capture the participant's experiences within the data shared by the participants. I also reviewed the data for saturation which was achieved in the interviews despite their length.

This generic qualitative study consisted of two methods for collecting data: semi structured interviews that were audio recorded (transcriptions completed for data coding) and personal note taking. The interviews were audio recorded via Microsoft Teams. Two of the participants chose to leave on their video, which was the only variation in the data collection procedures outlined in Chapter 3. I did not include any data or impressions that could have been gathered by paying attention to non-verbals during the interviews. No unusual circumstances were encountered during data collection.

The audio recordings were transcribed via Rev.com. The recordings were emailed to each of the participants to review for accuracy. None of the participants responded with questions or concerns within 7 days of the transcript being sent.

Data Analysis

Initial Coding

Reoccurring similarities were searched for within the data (Merriam & Tisdale, 2016). After completing the interviews, I uploaded the recordings into Rev.com to be transcribed. Once the transcript was complete, I downloaded a copy of the transcription to my personal computer and sent it to the participant for member checking. I asked each participant to respond within 7 days. None of the participants replied with corrections. To confirm the accuracy of the transcription I listened to the recordings while reviewing the transcription and my notes.

I organized the data from the transcripts in a Microsoft Excel worksheet. To identify meaningful themes in large amounts of content data, it is beneficial to categorize the data question by question (Vaughn & Turner, 2016). I typed a question on each workbook page in the second column. The first column listed the participant's number. Each participant's response was listed in the second column under the question. The data was coded and grouped using qualitative content analysis. The data was then grouped by themes. A conventional content analysis approach was used which included initial codes emerging. I developed the themes based off the repeated statements made by the participants. The coding process was completed by hand. Table 7 contains examples of the initial round of coding.

Table 7

Initial Round of Coding Examples

Participant	Quote	Initial coding label
4	*One on one mentoring, banking assistance, reading, writing, how to make bed, how to navigate life.*	**Basic living skills**
2	*Don't think so, they didn't know about services, something is missing, link is not connecting. Don't know about services once graduate.*	**Not aware of services**
4	*So I think, they just need another person in special education services in school, that can just be focused on that the same way they have individuals in school that help focus on like, OT and PT, things like that. They need to put someone like that in school too. And they need to start from elementary school because basic living skills, independent living skills, things like that, start young. They do it with regular children in school. I mean, that's how they start learning out.*	**Promote waiver services earlier**
6	*I think there are always barriers. Some of them are barriers related to the student or could be a teacher who may not be communicating that services that we provide since we do partner with the local school system, um, parents sometimes can be a barrier because they don't want to lose their social security benefits for their child, so they don't want them to be independent.*	**Parents as barriers, Administrators as barriers**
3	*They're very helpful, especially when the individuals are exiting the program and they haven't done what they needed to do in order to live independently. They have programs to aid the young individual in housing temporarily. They also help in job awareness, food, whatever they need. They basically have it set aside for then.*	**Proactive in addressing problems**

Second Round of Coding

Second round of coding was used to capture the direct quotes from the initial

coding. The codes were broken down to smaller themes. For example, some of the initial

codes were: more job skills training, more educational programs, and more independent

living skills. For example, for the question, "what additional services do you believe

should be offered," each participant answered with a specific skill that needs to be

enhanced and/or taught. The participants stated budgeting, job coaching, and

independent-living skills. The code was titled skills training.

Table 8

Second Round of Coding Examples

Participant	Quote	Initial coding label	**Second coding label**
P2, P3, P4, P5, P6, P7, P8 P1, P2, P3, P4, P5, P6, P7 P8 P3, P6, P8 P1, P3, P5, P6, P8, P2, P4, P8	*They offer 1:1 mentoring, they offer bank banking assistance, resume writing, basic living such as how to make their bed, how to go grocery shopping, how to interview, how to navigate life's issues, a plethora of things that they get.*	• Supports/Service Coordination • Skills Training • How best to navigate life • Direct Services • Community Involvement/Mentoring	• **How best to navigate life/independence** • **Supports/Service Coordination** • **Vocational/Job Training**
P2, P3, P5, P7 P2, P3, P5 P3, P5 P2, P4 P2, P3, P4 P1, P2, P3, P5, P6, P8	*They're very helpful, especially when the individuals are exiting the program and they haven't done what they needed to do in order to live independently. They have programs to aid the young individual in housing temporarily. They also help in job awareness, food, whatever they need. They basically have it set aside for then.*	• Being Proactive • Address Problems • Job Assistance • Get information out about Services • More Procedures/Guidance • Service Arrangement	• **Uncertainty/Lack of Resources** • **The unknown.** • **Getting information out about services.**
P1, P2, P3, P4, P8 P1, P2, P5, P8	*. They didn't know about services, something is missing, link is not connecting. Don't know about services once graduate.*	• Loop Holes • Lack of Resources	• **Uncertainty/Lack of Resources** • **The Unknown**

| P2, P4, P6 P2, P3 P4, P6, P7, P8 | *I think the biggest barrier a lot of times is parents and other barriers are just teachers that are unwilling to accept the fact that they're teaching human, a human being that have the same needs and wants that they do.* | • Parents
• Not being proactive
• Staff/Teachers | • **Parents as barriers**
• **Administrators as barriers** |

It should be noted that each participant displayed some form of frustration with the services or lack thereof in their state in the tone of their voice and word choice. Although interviews were audio recorded the frustration could be heard and felt by their tone. For example, Participant 3 made such statements as" management doesn't have a clue*".*

Determination of Final Themes

The final themes were determined after the second round of coding. Examples of the information from the first two rounds of coding and how that led to a final theme can be found in table 8. The final themes were:

1)Nonprofits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning

2) Uncertainties and lack of resources are detrimental to the transition process.

3) Parents, teachers, and key administrators present barriers to effective transition planning.

Table 9

Final Theme Coding

Participant	Quote	Initial coding label	Second coding label	**Final Theme**
P2, P3, P4, P5, P6, P7, P8 P1, P2, P3, P4, P5, P6, P7 P8 P3, P6, P8 P1, P3, P5, P6, P8, P2, P4, P8	*They offer 1:1 mentoring, they offer bank banking assistance, resume writing, basic living such as how to make their bed, how to go grocery shopping, how to interview, how to navigate life's issues, a plethora of things that they get.*	Supports/Service Coordination Skills Training How best to navigate life Direct Services Community Involvement/Mentoring	How best to navigate life/independence Supports/Service Coordination Vocational/Job Training	**Non-profits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning**
P1, P2, P3, P4, P8 P1, P2, P5, P8	*. They didn't know about services, something is missing, link is not connecting. Don't know about services once graduate.*	Loop Holes Lack of Resources	Uncertainty/Lack of Resources The Unknown	**Uncertainties and lack of services are detrimental to the transition process.**
P2, P4, P6 P2, P3 P4, P6, P7, P8	*I think the biggest barrier a lot of times is parents and other barriers are just*	Parents Not being proactive Staff/Teachers	Parents as barriers Administrators as barriers	**Parents, teachers, and key administrators present barriers to effective transition planning.**

> *teachers*
> *that are*
> *unwilling*
> *to accept*
> *the fact*
> *that they're*
> *teaching*
> *human, a*
> *human*
> *being that*
> *have the*
> *same needs*
> *and wants*
> *that they*
> *do.*

Theme 1: Nonprofits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning

The human service case managers that I interviewed discussed their thoughts on how best to address services for transition aged youth with intellectual disabilities. Each participant discussed the need for teaching basic living skills earlier on in the transition planning process in order for the individual to be successful once reaching adulthood. Six out of the eight participants discussed specific services that will be beneficial for students. Participant 1 suggested more educational programs while Participant 2 suggested counseling services that address what the individual will need once they complete high school. Participant 7 touched on the need for independent living skills for students that are exiting the foster care system. Participant 4 stated "one on one mentoring, banking assistance, reading, writing, how to make a bed, how to navigate life" as being beneficial services that should be offered to transition aged youth going through the transition process. Participant 8 also stated that "mentoring services should be offered to help students grow individually". She also discussed the need for job placement

services, stating "more job skills earlier, it takes our students longer to gain those skills. They need earlier and they need more often".

Participant 2 discussed how services are delayed because they are not needed while the individuals are still in high school, so they wait to try to get services organized too late. Once the student graduates they then attempt to seek services and are instead placed on a waiting list: If they stated earlier, they would be next or sooner. The waiting list is a listing that individuals names are placed on to wait for services for the Medicaid Home and Community Based Waiver program (see Chapter 2). Participant 4 also shared similar thoughts on the issues related to being placed on waiting lists for services. She stated that "nonprofits have waiting lists…those nonprofits do not get enough money to serve everybody's needs". "That's the flow of money, that's a federal issue". She also briefly mentioned how the process is handled so poorly. Participant 5 stated that "there are gaps in program funding…" "it's just never enough funding in any part to any field for individuals with intellectual disabilities".

The need for earlier services was a reoccurring theme throughout the interviews. When asked how do they feel transition services can be better provided seven out of the eight participants replied with statements regarding the need for promoting services earlier and how best to address needs so that the individual's needs are addressed before it is considered an emergency. Participant 2 stated that "services are not being sought until something major happens". This means that students are not being proactive in seeking services while they are still enrolled in high school, they instead wait until the individual has graduated or later in life once a parent has died or due to an increase in

maladaptive behaviors (emergency situations). She also suggested having a case manager or a counselor that can assist with setting up resources for after high school for those that need it or anticipate a need.

Participant 6 stated that "getting people more aware of the services we offer would help a lot, I think that communicating more with the student maybe from middle school so they can be prepared for the services we provid*e*". Participant 2 noted the need for "promoting earlier, be more involved in the community, and more pamphlets in areas that do not have a lot of resources". She also briefly discussed how problems go without resolve when nonprofits are not involved and/or services are delayed. Participant 4 discussed how once services have stopped after high school the student no longer has anyone providing guidance or an "overseer", which could mean that the individual could possibly go without the needed supports and or resources. According to Participant 4, if the individual is not receiving services consistently, they could possibly lose valuable skills while waiting to get access to necessary services.

Theme 2: Uncertainties and lack of services are detrimental to the transition process

Participants discussed the lack of services available during the transition process for youth with intellectual disabilities. When asked what are the services that are currently offered for youth with intellectual disabilities, they were not really sure which services were available to youth with intellectual disabilities consistently. Again, there was frustration demonstrated from participants regarding the lack of services being provided to prepare the students for adulthood.

In regard to the services provided by nonprofits to address the needs of the students in transition services, Participant 2 stated that adult nonprofit providers are not involved in the transition process in the State of Alabama unless the student is receiving case management from the Medicaid waiver programs. Participant 1 stated that she was not aware of the services offered and stated that there were "loopholes" and gaps in services that individuals fell through. Participant 4 indicated that there were gaps in services in Texas as there are "not many services available for students with disabilities in Texas transition or otherwise, you have to be on the waiting list for 30 to 40 years". Participant 7 detailed how the students are not getting services in the State of Florida due to a case manager shortage which resulted in individuals "slipping through the cracks". This participant also indicates that if the student remains in school until the age of 22 and does not receive funding for services, they sometime become homeless and end up in the judicial system. Participant 4 stated that she thinks that

> We should put more effort, more money, and more staff into a facility that is not a school for the students to attend for skills training…If you don't have somebody who's really going to advocate for you the whole time or has deep pockets, you are not going to get the services you need because the nonprofits are overwhelmed with who they have to serve already.

Theme 3: Parents, teachers, and key administrators present barriers to effective transition planning

The participants discussed how parents, teachers, and administrators can be barriers for effective transition planning. Parents were considered a major barrier for

effective transition planning as Participant 2 stated: "parents play a major part; they don't want services until something major happens". Participant 4 discussed how parents don't provide their child with adequate tools to succeed, such as proper state identification cards needed to access services. Participant 6 stated that "parents sometimes can be a barrier because they don't want to lose their social security benefits for their child, so they don't want them to be independent". Participant 8 detailed how parents sometime limit opportunities for self-determination. She gave an example about how an individual wanted to get married and live a "normal life" however, her mother did not believe that she had the capacity to manage a normal life. The individual was 48 years old.

Participant 4 discussed how teachers are barriers. Teachers "are unwilling to accept the fact that they are teaching humans, a human being that has the same needs and wants as they do". Teachers were also considered barriers due to not telling students about the services that are provided by case managers. Participant 2 indicated that individuals are not aware of services once they graduate, which implies that teachers are not presenting this information to the individuals and their family. Participant 6 shared similar beliefs, she stated that "teachers do not communicate the services that case managers provide".

Lastly, it was discussed how key administrators can be potential barriers to effective transition planning. Participant 2 stated that nonprofits are not involved in the State of Alabama, which can suggest that nonprofit directors should take a more active role in the transition process or given the opportunity to participate. Participant 3 discussed how transition services could be better provided if the

"management/managerial team would have a better perspective on what is needed". She also stated that the "management team or overseer needs to have some safeguards in place for individuals daily, so that they are not shell shocked ". Participant 5 stated that government officials cut funding "they feel that budgets can constantly be cut".

Evidence of Trustworthiness

Credibility

Credibility was established by accurately reflecting the participant's statements utilized in the data analyses. This was achieved by audio recording the interviews via Microsoft Teams and asking the participants clarifying prompts to ensure their responses were accurately reflected. I also utilized triangulation by documenting notes and impressions during the interview using a journal so I could also refer to these notes when analyzing the data to check if my impressions of information matched later interpretation of the data.

Member checking was used to ensure credibility of the results by sending the participants the final transcript for review. None of the eight responded with corrections. Saturation started to occur around interview five. I was able to find consistent ideas/themes with eight participants. Saturation was achieved after completing the eighth interview, which was determined by the guidance of the chair.

Transferability

Transferability of the results was assisted by providing direct quotes from participants so the information shared could be compared to other case manager experiences. Results of the study can be generalized to those that match the inclusions

criteria of this study including human service case managers that have worked for at least six months providing case management to individuals with individuals with intellectual disabilities in transition between high school and adulthood, who are at least 18 years of age, read, speak, and understand English. I also detailed the setting, participant demographics (for comparison and generalizability to others), and the findings of the study so that other researchers could potentially replicate the results and I provided detailed steps regarding the actions that took place to complete the study.

Dependability and Confirmability

I provided details about the research methodology I followed as well as details on how I completed data coding and analyses so that another researcher can replicate recruitment, collection of data, and the coding of the data into the themes that answer the research question (Amankwaa et al., 2016). I reviewed each of the interviews several times to ensure accuracy. Audit trails were used to show how I determined the themes and how decisions were made regarding the study. I took notes in the journal to ensure that my own personal biases were not reflected and provided an audit trail detailing each step taken to produce the same results. I also provided statements from each of the participants so that the reader could understand how I went from statements made to the different levels of coding and arrived at the answer to my research questions.

<div align="center">

Results

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Research Question 1

RQ1 was: What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not

effectively provided to these individuals to help with the transition between high school and adulthood? When asked about the specific transition services that they identified as not being provided, or not effectively provided, each participant discussed the uncertainties and lack of services as described in theme 2: Uncertainties and lack of services are detrimental to the transition process. The data revealed that human service case managers are frustrated with the transition process due to the lack of services being provided. For example, Participant 2 stated, "they usually aren't already on the waiver, so they are just on the waiting list, nothing offered just monitoring the waiting list status". Participant 1 discussed the need for more funding services stating, "more resources, specific resources, being able to have access to housing, more funding to help aid them on". The need for more structure was also an area for concern. Participant 3 stated that, "if you don't have a good base structure in place, no the services does not meet the needs, if you let them come in and they're 18 to 21 and you allow them to do nothing, then it does not meet the needs".

The responses suggest that overall lack of services being provided during the transition process is detrimental to the transition process and that gaps need to be filled Theme 1: Non-profits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning. According to the participants there is no involvement from the adult nonprofit providers. Most families are not aware of the services provided and are waiting to seek services until an emergency occurs, such as the death of a parent. The participants indicated that the transition services should start earlier and information should be provided to families regarding the services that are available

after high school ends. There also is a lack of structure during the transition process and not much for the students to do on a daily basis to learn the skills needed to make a successful transition to adult life. Participant 3 discussed how if there is no structure the students are allowed to do nothing. Participant 4 discussed how case managers complete "bogus" assessments for vocational services however, there is no actual implementation of the plan due to the belief that the students cannot work.

The specific transition services that the human service case managers recommended were skills training, independent living skills, educational programs, and counseling services. The specific skills the participants believed need to be taught are budgeting skills, how to apply for jobs, and self-advocacy. The supports that need to be addressed are case management in the school setting, counseling services, and monitoring after the completion of high school.

Research Question 2

RQ2 was: What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge the any gaps in transition services already offered by public entities? The participants recommended that team members working with the individual and their family need to be more proactive in arranging services for the individual. It was recommended that information regarding the adult waiver services should be provided earlier on in the process due to the extensive waiting lists that exist in each state. Participant 3 stated that the management team of nonprofits should have a better perspective of what the individual will need so that the team can

work towards addressing the individual's needs or have a plan in place for those specific needs. Participant 5 discussed the need for addressing services earlier as they do for children without disabilities: "They need to start from elementary school because basic living skills and independent living skills, and things like that start young". Participant 6 suggested that services start during middle school so that they can be better prepared for the transition from high school to adulthood.

The barriers that are put in place are often put in place by those that should be supporting the individual with developmental disabilities. Participant 4 stated transition services offer the opportunity for one to believe that they are capable of achieving and doing more than playing on a computer, using an iPad, watching movies at home, and capable of more than just staying home with mom and dad. Participant 2 stated "services aren't meeting the individual's needs they are not aware of services once they graduate". Participant 6 stated "we help teach them how to advocate for themselves and help them understand what a disability is".

Participants expanded on how parents can be a major barrier to transition planning. Participant 2 stated parents are viewed as a barrier because they wait until an emergency situation occurs to seek out services. The participants believe that the parents do not help their child by providing them with the tools they will need to transition effectively, they also do not provide opportunities for utilizing self-determination. It was also stated that parents are believed to lessen these opportunities so that they do not lose their federally funded benefits according to Participant 6. Participant 8 recommended an ongoing monitoring system to help with their adult roles as they go through each stage in

life. She also stated that "individuals lack confidence in believing that they can live a normal life, like normal people and be given the opportunity to do so, in most cases they aren't given this opportunity because they have disabilities".

Summary

In conclusion, the purpose of the study was to further understand the perspectives of human service case managers who work with individuals with intellectual disabilities regarding the services that are available and those that are needed in order to support the transition to adulthood successfully. The participants believed that individuals are not being provided with the proper tools or opportunities to best navigate life and to live independently in their own terms. The three themes summarized the perceptions of the participants in regard to what they believe is needed in order to help youth with intellectual disabilities successfully transition into adulthood.

Theme 1 was that nonprofits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning. The participants recommended that skills training should be provided proactively earlier to bridge the gap in transition planning. By getting information out about services earlier that are available once the individual graduates, the waiting period could possibly be lessened.

Theme 2: indicated that uncertainties and lack of services are detrimental to the transition process. The participants detailed how there is a lack of services being provided during the transition years with little input from adult service providers. The participants explained how inconsistencies and frustrations are experienced amongst the youth and their families within the transition service system. Finally, theme was that parents,

teachers, and key administrators present barriers to effective transition planning. The participants believed that the support team (family, teachers, and administrators of nonprofits) are not being proactive in helping with service arrangement and in addressing needs before they occur. The participants also discussed how there is a lack of services being provided during the transition years with little input from adult service providers. Overall, the participants shared how the teachers and administrators that they have collaborated with appear unequipped and are not forward thinking when it comes to planning for the future needs of the students.

In summary of the first research question (What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not effectively provided to these individuals to help with the transition between high school and adulthood?), the participants suggested that skills training and supports be provided earlier on in the transition process so that the student can be better prepared for adulthood. The participants believed that independent living skills are needed in order for the student to be able to actively participate in their community with less support from service providers. The specific skills that they believe is needed are basic living skills such as hygiene maintenance, being able to perform basic household chores around the home, and skills that will help them gain employment.

Research question 1, was created to examine what the case manager considers as a missing component to the current transition planning process. Theme 1 most likely coincides with the first research question because it reflects the specific transition services that the participant believes will best help the student transition successfully.

Theme 3 details what the participants consider to be barriers to effective transition planning, which shows how important team members roles are in support of effective transition planning.

Research question 2 (What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge the any gaps in transition services already offered by public entities?), was related to their recommendations are for filling the gap in the current service model for transition services. Themes 1 and 2 both address research question 2. Theme 1 details the recommendations in regard to services and how best to provide the services. The participants recommended that services be provided proactively earlier to bridge the gap in services that are already offered by public entities. The actual teaching of skills appears to be much later in the transition planning process. There is not much discussion of employment and higher learning during transition planning. Once the student graduates there appear to be very little services available or very little is known regarding services to the case manager.

Theme 2, the participants recommended that the services are consistent and more developed. Based on the perspectives of the participants the services are not consistent and lack in regard to what is actually available for the student. This theme sheds light on the need for more resources and informs nonprofit organizations about which services they should consider providing.

None of the participants shared any success stories of how the current model has benefited the students. The time after high school was described as a period of waiting for services. The participants suggested that if the teachers and administrators were to start discussing the adult services and were to start planning earlier for needs later in life, the waiting period could possibly be lessened. Parents are also considered barriers to effective transition planning due to not allowing the students to practice self-determination skills and not being proactive in applying for the waiting list for adult services. Not all youth require services once high school is completed however, if the student does require services, they will not have the services that they may need which also could lead to losing key skills that are needed in order to live an independent life. In chapter 5, I will summarize the key findings of the study, the limitations, recommendations, and detail the implications for social change.

Chapter 5: Discussion, Conclusions, and Recommendations

Introduction

The purpose of this generic qualitative study was to understand the perspectives of human service case managers who work with individuals with intellectual disabilities in regard to services that are available and those that are needed in order to support the individual and make the transition to adulthood successfully. I have not, however, found researchers who have examined the perspectives of human service case managers and their suggestions for transition services for youth with intellectual disabilities. This information may provide a better understanding in the following areas 1) inform human service agencies and nonprofit organizations about what services they may want to offer, 2) develop training and resources available to human service case managers to assist them in accessing services that are available and 3) identify gaps in what human service case managers know about services available to their clients with intellectual disabilities.

Human service case managers were interviewed and discussed their frustrations with the service models, and shared their suggestions for future services, and discussed recommendations and topics that resulted in three themes that answered the two research questions. The final themes were:

 1) Nonprofits should provide skills training and supports proactively earlier to help bridge the gap in the transition planning.

2) Uncertainties and lack of resources are detrimental to the transition process.

3) Parents, teachers, and key administrators present barriers to effective transition. planning. In this chapter I discuss my interpretation of findings in relation to my

theoretical foundation of the study and the literature review, limitations of the study,

recommendations for future research, and implications of the study in relation to social

change and practice.

Interpretation of the Findings

Interpretation of Findings in Relation to the Theoretical Framework

I used ecological systems theory to analyze the perspectives of the human service

case managers that work with youth with intellectual disabilities to examine how each

level of systems that an individual functions within affects their choices and developed

behaviors (Bronfenbrenner, 1979). The theoretical lens was useful for analyzing and

interpreting the human service case manager's responses as they work within multiple

settings that affected not only their experiences, knowledge, and behavior but also

because they work across the settings and levels that youth with intellectual disabilities

need to navigate during their transition years. The final themes that emerged through data

analyses were:

1) nonprofits should provide skills training and supports proactively earlier to

help bridge the gap in the transition planning;

2) uncertainties and lack of resources are detrimental to the transition process.

3) parents, teachers, and key administrators present barriers to effective transition

planning.

Theme 1: Non-profits should provide skills training and supports proactively earlier to help bridge the gap in transition planning

According to the participants, the current existing systems and services for addressing the transition needs of youth with intellectual disabilities do not meet the needs of youth with intellectual disabilities. Participants indicated that services and supports should be provided earlier in order to help the individual to succeed with the transition process. In relation to the ecological systems theory, different systems/environments and levels are determining the services and supports that will be offered to youth with intellectual disabilities to make the transition from school to adult life.

The case manager's role is to help the individual transition and to help locate community placement. If the different systems that contain services and supports do not connect or overlap (where the services/supports of one end another begins) there will be gaps. This means that the transition process will not occur seamlessly; there will be areas that are not addressed in the transition, and the needs of the individual will not be met (Ruppar et al., 2017). All eight participants expressed frustration in some form with how the different elements needing to be addressed in transition services exist as there are gaps that individuals can fall through. For example, participant 2 stated, "yes there is a gap between high school and adult services, nothing is being provided". This indicates that there is a need for other agencies to fill the gaps which means that nonprofits have a niche that they could fill.

Theme 2: Uncertainties and lack of services are detrimental to the transition process

The ecological systems theory indicates that systems not only function within their levels of systems but that they also interact with others in their level as well as others (Bronfenbrenner, 1994). However, when these interactions between systems and levels are not effective then gaps can exist that cause individuals to experience issues (Wilson et al., 2017). There is a need for comprehensive transition services for youth with intellectual disabilities (Talapatra et al., 2018) but it has been found that school personnel lack knowledge regarding the transition process, and it is inconsistently handled by school personnel (Karal & Wolfe, 2020). Services for youth with disabilities lack compared to services for youth without disabilities (Bakken & Obiakor, 2019). School personnel lack knowledge regarding the transition process, and it is inconsistently handled by school personnel (Karal & Wolfe, 2020). Based on the premises of ecological systems theory, if those organizations that offer supports and services for successful transition process were better connected with each other, the information about transition services and where they are offered were more transparent, and the process to attain these supports and services were more consistent and interconnected, it would then mean that there would be a better chance for youth with intellectual disabilities to be able to go through the transition process successfully (Pianta, 1999).

After completing high school, individuals must be able to navigate a new system of services that have eligibility requirements that are different than they needed to meet to get services in school (Honeycutt & Wittenburg, 2016). Each setting that the individual receives services from can involve different requirements and funding sources which

makes the process of transition even more difficult (Walker, 2014). The transition from

school to post school and employment placement has been found to be inconsistently

facilitated by school personnel that lack knowledge of transition regulations, the services

and supports that are available, how to access these services, and a lack of understanding

in how to facilitate the transition process effectively (Kara & Wolfe, 2020). Participant 1

stated "just knowing where to look, where to was important in regard to how to access

services". This inadequate planning, due to not knowing what needs to be planned or how

to access it, may lead to unemployment, higher federal and state spending, and possibly a

less satisfying life. As previously discussed in the literature, these uncertainties can lead

to added stress for the individual as well as their support system (Austin et al.,2018).

Theme 3: Parents, teachers, and key administrators present barriers to effective

transition planning

The participants indicated that the parents, teachers, and key administrators are

barriers to an effective transition for youth with intellectual disabilities. Even though

these individuals indicate that they have the best interest of the youth in mind,

participants indicate that they often limit the individual's right to choose what they want

to do with their lives. Team members of the Individualized Education Plan (IEP) team

interact with the student on a daily basis (teachers, administrators, and parents) and come

together to develop both the education and transition plans for the student (Ruppar et al.,

2017). Participants shared that key team members often fail to advocate for the wishes of

the youth with intellectual disabilities in these meetings. There are a variety of reasons

for this lack of advocacy including that the members of the team are within isolated

levels of systems, and they may not see the aspects of different levels and how they interact. Members of different microsystems and bring their own experiences with the youth with intellectual disabilities that contribute to the development of the IEP but they may be shortsighted in terms of other levels and systems (Ruppar et al., 2017).

Although there are systems setup for providing independent living and supported living there are barriers that prevent people with intellectual disabilities from achieving their independence (Bridges et al., 2020). For example, administrators may have only had interactions with the youth related to bullying by other students. They, therefore, may believe that the youth would not be successful in a work or independent living situation because they believe that others may take advantage. The teacher may work with the student often to understand money so they may believe that the youth could not manage their money, bank account, or pay bills. Parents also have a tendency to see the youth with an intellectual disability as a perpetual child (McKay, 2019) and may not believe that their child could make it in the world without their constant support. The mindset of parents was also shared by the participants. Participant 4 stated, "I think the biggest barrier a lot of times is parents and other barriers are just teachers that are unwilling to accept the fact that they are teaching human beings that have the same needs and wants they do".

These members of the IEP team are decision makers that have great influence on what transition services will be utilized and implemented (Ruppar et al., 2017). Unfortunately, when discussing transition services, the team is primarily made up of school related members and there is often minimal involvement from adult service

providers in transition planning. For example, participant 2 stated "nonprofit adult providers aren't that involved unless they get with case management, they have no involvement". This limits adult service provider roles in the transition plan for the youth with intellectual disabilities and leads to gaps in the services (McKay, 2019).

Interpretation of the Findings in Relation to the Literature

Theme 1: Non-profits should provide skills training and supports proactively earlier to help bridge the gap in transition planning

According to Cimera and Vaschak (2015), individuals with disabilities are not being provided with the proper tools or opportunities to best navigate life and to live independently federal law requiring that transition training and services be provided by the age of 16 but it is often at the last moment before they leave high school. This was supported by my data when participant 7 stated that "the transitional IEP occurs six months before they graduate". In contrast to starting transition services at the age of 16 (Cimera & Vaschak, 2015; Mello et al., 2021) the current study suggests starting transition services before the age of 16 showing the need for proactive services. Participants indicated that transition services should be provided earlier to youth with intellectual disabilities, instead of just within a few months of graduation, so that youth could be more successful in their transition to adulthood. The participants recommended teaching the students the skills earlier so that they are better prepared for life after high school.

One of the purposes of secondary education is to provide students with the skills and experiences that will help them function as self-sustaining adults (Redhead et al.,

2019). Transition services for individuals with disabilities should include assessment, planning, and instruction in the areas of focus are in education, employment, and independent living skills (Dawalt 2020; Trainor et al., 2016). Skills training, independent living skills, and other educational programs such as to address employment skills, need be strengthened to help build the gap in transition planning. For example, participant 7 stated "a lot of kids are not coming from the family home, they are coming from foster care so independent skills are needed". However, the participants also stressed the need for more focus on budgeting skills, how to apply for jobs, and self-advocacy skills. This was supported by participant 1 who stated, teach "financial stability, budgeting, how to pay bills, repetition, how to apply for jobs". While there are also services that can be available to youth with intellectual disabilities inside and outside of school to help with transition, participant 3 stated that "the students don't take full advantage of the program, then when it's six months to them turning 21, that's when they get serious" which indicates a need to promote these serves and supports earlier and encourage youth to use them.

Theme 2: Uncertainties and lack of services are detrimental to the transition process

The transition process for individuals with intellectual disabilities can bring forth many uncertainties in the areas of school, work, and independent living (Austin et al., 2018). Despite the importance of effective transition planning and services, there is a lack of services being provided during the transition years. Participant 4 stated, "not many services available for students with disabilities in Texas transition or otherwise, home and home support services". The participants explained how inconsistencies and frustrations

are experienced amongst the youth, their families, and case managers within the transition service system. Participant 3 stated "they need rules and regulations. There's no procedures in place. They keep saying it's trauma. They just wanna know are you gonna be able to come to work every day".

The participants shared how the support team (family, teachers, and administrators of nonprofits) are not always proactive in helping with service arrangement and in addressing needs before they occur. Transition planning can sometimes be insufficient due to the lack of info regarding the participant's needs, interest, and level of intellectual functioning (Brendle et al., 2018). Interagency collaboration has been found to be an effective tool for transitioning into adulthood for people with disabilities however, transition teams need to define who the key team members are and what the goal is that they plan to achieve (Fabian et al., 2016. The case manager has been found to have an influential role in how services are perceived and communicated for the people they support (Stanhope et al., 2016). Participant 2 shared that the case manager role can be important but that it can come after they leave high school instead of a better overlap. She indicated that "once they come out of high school, we assist with getting placement, try to find group homes or community placement such as day or personal care, prepare for what's next after high school". This finding is important because it shows the need for the case manager as well as earlier services; the need for case managers has not been previously discussed.

Adult providers include state programs, pre-employment programs, independent living, case management, speech language pathologists, and other administrators

(Wehman, 2020). Each provider's role is valuable to the transition process and that they should have involvement in the transition team to provide information that will allow for a seamless transition process (Goran et al., 2020). The participants discussed how the adult providers are not always involved in their transition teams. Participant 2 stated that "there are no services being provided between high school and adulthood" and participant 7 stated "we don't have any nonprofits only for-profits". However, some of the participants did have positive experiences with the adult providers in the transition period. Participant 6 stated I think they are meeting the needs. There are always some who require more, more assistance and more guidance, but for the most part, "I think they are meeting the needs of our youth, the ones who know about the vocation rehabilitation program. Participant 3 stated that "the adult providers aid the young individuals in housing temporarily, they also help in job awareness, food, whatever they need, they basically have it set aside for them". There are systems set up for supported living and to promote independent living. However, there are barriers that prevent people with intellectual disabilities from achieving their highest level of independence (Bridges et al., 2020).

Theme 3: Parents, teachers, and key administrators present barriers to effective transition planning

Parents play a major role in the individualized education team, as they help in decision making and planning for implementation of the special education services (Zagona et al., 2019). The participants in my study indicated that parents do not provide them with the tools they will need to effectively transition or that opportunities for

utilizing self-determination. Participant 6 stated that "they" [parents] *"don't want them to be independent"*.

The participants shared that parents, teachers, and administrators are not forward thinkers in regard to planning for the future needs of the students. They detailed how the teachers appear unequipped when it comes to the planning needs for the students. Teachers were considered barriers also due to not telling students about the services that case managers provide as" teachers do not communicate the services that case managers provide" (Participant 6). The teacher should instead be including the student's interests and preparing the student to be an active participant in their IEP meeting, their education, and their transition to adulthood (Wehman, 2020).

Teachers should be trained in the skills needed to link academics to what the students will be expected to do when on their own (Scott & Puglia, 2018). However, this is often not easy for teachers to do due to their extensive responsibilities as it is "very hard and the teachers really can't keep up with how much these students know and who's at what level, because they're also just worried about the regular education curriculum" (Participant 5). Participant 2 also stated "they didn't know about services, something is missing, link is not connecting, don't know about services once graduate", implying that teachers are not informing the students and the families about the services available once they complete high school. This supports the idea that the case manager, who is not a teacher but a professional that will work with the youth in adulthood, should be involved early on to help coordinate the process of creating a system of services to meet the needs

of students both in and after high school (Bogenshutz, et al., 2019). This information will add to the current literature regarding the need for case managers to be included in transition planning on a more consistent basis.

There is a lack of services being provided which leaves gaps in services for youth with intellectual disabilities (McKay, 2019). Part of the issue was identified as being related to lack of funding (Rouse et al., 2005). Participant 5 stated that the government officials continue to cut funding; "they feel that budgets can constantly be cut. She also discussed how there are gaps in program funding, it's just never enough funding in any part to any field for individuals with intellectual disabilities". Once an individual with intellectual disabilities graduates high school, they are placed on the waiting list when they attempt to seek services which can take a very long time. During this time, the individual may lose transition skills that they had gained in high school as they languish without the services needed to be an effective adult (McKay, 2019).

Limitations of the Study

The current study had a few limitations. The first limitation was the sampling strategies used. I utilized purposeful sampling where the participants were selected based on their ability to provide information that is relevant to the topic (Vasileiou et al., 2018). Convenience sampling from these individuals allowed me to select participants that believed that they met the inclusion criteria and who reached out to me after seeing the recruitment materials. The use of purposeful convenience sampling limits the generalization of the results to only those who met inclusion criteria and only those who had an interest to participate, and saw my recruitment materials in specific locations,

volunteered so this also limits the generalizability of my results to others outside of the characteristics of my sample (Andrade, 2020). Snowball sampling also was used and presents a limitation to the generalization of the results because it does not ensure sample diversity because some of the participants may have similar experiences due to their proximity to one another (Kirccher, 2018). This sampling strategy may also exclude those with differing views, so it is important to only generalize the results to similar groups as the sample (Kirccher, 2018).

The second limitation was the small sample size. By having a small sample size, the results could potentially be considered not an accurate representation of the overall population (Vasileiou et al., 2018). However, in qualitative studies there are small sample sizes used and these results are considered valid and reliable if the researcher reaches saturation within the data before ending data collection (Creswell & Creswell, 2018). I ensured that saturation was met by following up looking for similar information that was being shared by my participants throughout the interviews. Once I believed that I reached saturation, I shared this information with my chair who reviewed the information and confirmed when saturation was met. Researchers often challenge how many interviews are considered enough to truly reach saturation in a quantitative study (Kindsiko & Poltimae, 2019). The variability of the sample composition has an effect on the necessary sample size to reach saturation (Kindsiko & Poltimae, 2019). It has been found that typically six to seven interviews will capture themes in a homogeneous sample (Guest et al., 2020). Since my sample was homogeneous, I had eight participants, and I reached saturation of the data, I believe that my results are reliable and valid.

Further, all of the participants in my study were female (homogenous). This is a limitation because the male perspective was not included since no males responded or inquired about participation. The perceptions of men in research are often lacking and unheard (Baum, 2016). It has been found that women are easier to investigate, and they are more accessible to researchers than men (Baum, 2016). Future researchers should consider expanding the sample (Kindsiko & Poltimae, 2019).

The final limitation was the use of virtual interviews. This method of interviewing could have limited the participants to those that were virtually savvy and/or who had reliable access to the internet. This could have limited the representation of potential participants in rural areas or lower socioeconomic backgrounds (Roberts et al., 2021). Utilizing other methods to interview participants in future studies should be considered such as recruiting and interviewing participants face to face in their community.

Recommendations

It is important to have a better understanding of the perspectives of human service case managers who work with youth with intellectual disabilities regarding the service that are available and those that are needed in order to help the individuals transition successfully into adulthood. Other than addressing those issues described in the limitations section of this chapter, future researchers could also consider other aspects to study related to this topic to better explain what is being experienced. For example, future researchers should consider examining in detail what the processes that need to be followed by human service case managers in order to get individuals access to transition

services from different organizations. This information could help determine gaps in the process to develop a more cohesive and connected process.

Another area recommended for future researchers is to gather and analyze the perspectives of human service case managers that work with adults with intellectual disabilities. These case managers could provide valuable information about what adults with intellectual disabilities do well and also struggle with in relation to independent living and employment skills. This information could inform a better focus in the services and training that are offered to youth with intellectual disabilities in the transition phase to better ensure that they are prepared for what they will encounter as they are adults.

Lastly, future researchers may consider a different method for seeking participants. The social media platforms had several potential participants seeking to participate however, they did not qualify which limited the number of qualifying participants. This method of recruitment can include potential generalizability, which can possibly lead to sampling bias (Jones et al.,2020). Another possible limitation to this method of recruitment is the ability to validate the identity of the participants so there is a small chance that someone could have misrepresented themselves (Jones et al., 2020). This method also brings risks for the researcher. When selecting this method for recruitment the potential participants have access to the researcher's personal information. It has been suggested that researchers should create a personal profile for recruiting participants (Jones et al., 2020).

Implications

Implications for Positive Social Change

Theme 1: Non-profits should provide skills training and supports proactively earlier to help bridge the gap in transition planning

My findings indicate that human service case managers believe that there is a need for skills training and supports proactively earlier to help bridge the gap in transition planning. Specific recommendations include basic living skills, teaching educational supports, mentoring, and job placement. The transition period often lacks structure and limits the student's daily access to skills development, which could provide preparation for adulthood, based on the participants' responses. Case managers and school administrators should be sharing information with families regarding the services that are available once high school ends and ensure that specific plans are set early on so that the student has time to learn the necessary information and skills before they leave school.

Theme 2: Uncertainties and lack of services are detrimental to the transition process

The transition period presents many challenges and uncertainties for youth with intellectual disabilities (Austin et al., 2018; Papay & Bambara, 2014). My findings suggest that issues with employment and social roles most often occur during the transition period to becoming an adult which may continue throughout adulthood if they are not supplied with the tools to make the transition successfully (Wilson et al., 2017). There is a lack of services being provided with very little involvement from adult service providers. It is imperative that the student's team come together collectively to help the

student obtain their goals in life and to create, and follow, a specific plan to help them reach their goal(s).

Theme 3: Parents, teachers, and key administrators present barriers to effective transition planning

The case managers discussed how parents, teachers, and key administrators present barriers to effective transition planning by not providing students with the proper tools needed to succeed in life. Students need to be informed about the services that are available once they reach adulthood so that they can start addressing and preparing for the requirements of those services. The need for adult service providers to be included in the transition process is vital for a seamless transition to occur.

The information from this study can be used to educate member of transition teams about why they need to improve the support and advocacy provided to youth with intellectual disabilities. This includes educating them about the gaps that exist in the transition process and service so that members of the team, especially the human service case manager who works to coordinate supports and services, are aware of areas that they may not have normally considered. The findings of this study can then impact the focus of the team to provide transition aged youth with intellectual disabilities the chances to enhance their quality of life, by equipping them with the needed resources/tools and/or technology that can help them live a more independent life with a lesser need for parental support in adulthood. The results can be used to develop new programs, and/or improve existing once as well, for helping teach transition aged youth the skills they will need to live a well-rounded life.

Implications for Practice

Theme 1: Non-profits should provide skills training and supports proactively earlier to help bridge the gap in transition planning

My findings could be used to create and implement new programs, services, and supports for students with intellectual disabilities in nonprofit organizations as well as improve those that currently exist. Non-profits should consider not only trying to fill the gaps in services and supports that are occurring in relation to transition, but also look to becoming hubs of information to help schools, youth, parents, and others 1) to understand what they need to do to ensure successful transition, 2) to know where/who different transition services are provided through, and 3) to navigate the different organizations and systems to ensure that gaps in services do not occur. Nonprofits could also work with advocates to try to get some of the gaps and inconsistencies that exist in government organizations fixed so that it is not as difficult to ensure services.

New policies and procedures could be developed for the facilitation and monitoring of the Medicaid waiting list. This issue may also need to be further studied if this truly is an issue that is preventing transition planning to occur at an appropriate time. The waiting list influences the services and supports that nonprofits can provide to people with intellectual disabilities, and this may need to be something that could be revisited and revised so that this is not a barrier for students and their teams in relation to successful transition.

Theme 2: Uncertainties and lack of services are detrimental to the transition process

Throughout the analyses of the data provided by my participants, I identified a possible need for a more unified and consistent transition process for youth with intellectual disabilities. This period when students are leaving high school and entering adulthood is already full of uncertainties, and even more when the student has intellectual disabilities. This period of uncertainty could be better addressed by educational systems or states hiring case managers to work in the school setting to ensure that the needed tools/resources are addressed when planning for post high school. Case management agencies may also consider providing town halls for families/caregivers to inform them of the services/supports that will be needed at the start of 9th grade for implementation after high school to be more proactive in-service arrangement. This information should also be provided annually at the person-centered plan meeting.

Theme 3: Parents, teachers, and key administrators present barriers to effective transition planning

To help youth transition successfully parents, teachers, and administrators need to be educated on what their role is in the transition process so that all the student's needs are addressed and so they can act as productive members of the transition team instead of as barriers. This may be accomplished by educating each member of the team what their role is during transition planning and how they could result in being a barrier to the process. Team members may believe that they are making decisions that are "in the best interest" of youth with intellectual disabilities and may not know how these actions can be a barrier if not told about this. They may also need to be reminded periodically about

the goals of transition planning and how they can support the goals of the student. Quarterly reviews may need to take place to assess progress periodically so that all goals are met before graduation. Adult nonprofits should start providing assessments and services at the start of a student's high school experience to have the time that is needed to provide the individual the ability to live an independent life after the completion of high school.

Overall Implications of Study

The overall implications from the study in relation to transitional services for youth with intellectual disabilities include the acknowledgement of the importance of preparing students for their adult roles by teaching the needed daily living and self-determination skills that are needed later in life so that they are better equipped adults. The results of this study have provided a better understanding of the factors that have an influence on positive transition planning. This method of inquiry also helped in understanding how best to address the individual's needs since the research showed how the individual's needs and wants are often overlooked. This information can be used to bridge the gap in transition services already offered by nonprofits and help better prepare case managers with the needed tools and resources to help youth with intellectual disabilities to successfully transition into adulthood.

<div align="center">Conclusion</div>

In order to help youth with intellectual disabilities better prepare for life after high-school human service professionals need to have a more active role in the individual planning needs for students. By examining the perspectives of the case managers, we

were able to get a differing viewpoint which have not been previously studied. The purpose of this generic qualitative study was to further understand the perspectives of human service case managers who work with individuals with intellectual disabilities in regard to the services that are available and those that are needed in order to support the individual in making the transition to adulthood successfully. The research questions were: (RQ1) What specific transition services do human service case managers who work with individuals with intellectual disabilities identify as not being provided/not effectively provided to these individuals to help with the transition between high school and adulthood? and (RQ2) What recommendations do human service case managers who work with individuals with intellectual disabilities have for specific transition services that could be provided by nonprofit organizations to bridge any gaps in transition services already offered by public entities?

This research will contribute to the literature as it is the first to examine the perspectives of human service case managers. Case management services usually last a lifetime, so their perspective is valuable in planning for the future needs of youth with intellectual disabilities. This research also adds to the previous research that has been completed on the need for better transition services. It can be concluded that if services that are provided earlier and more frequently it could help bridge the gaps in transition services already offered. There is a need for more planning related to the period after the completion of high school. By eliminating barriers and roadblocks to services, human service case managers could better help youth with intellectual disabilities successfully

transition into adulthood by providing advocacy services and equipping youth with

proper tools that can lead to a life of independence and inclusion.

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Appendix A: Recruitment Materials

- Are you a human service professional that works with transition age youth with intellectual disabilities? If so, please take part in this study so that you can help advance the transition planning process.

This Photo by Unknown Author is licensed under CC BY-NC

Participant Qualifications:

- Do you provide human service case management services to individuals with intellectual disabilities in transition between high school and adulthood?
- Have worked for a human service organization for at least 6 months providing human service case management services to individuals with disabilities in transition between high school and adulthood?
- Are you at least 18 years of age?
- Can you read, speak and understand English?

If you know others who may qualify to participate in this study, please feel free to forward this information to them.

Appendix B: Interview Protocol

Demographic Questions

Question	Prompt
What is your gender?	*Male, female, prefer not to answer?*
What is your race?	*White, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander, Other, or prefer not to answer?*
What is your position title? NA	*(Open ended)*
How many years have you been providing human service case management services to individuals with intellectual disabilities? NA	*(Open ended)*
What is your highest level of education?	*Associate Degree, Bachelor's Degree, Master's Degree, Doctoral Degree?*
Do you have a child who ever needed transition services provided to them?	*Yes, no, prefer not to answer?*

Interview Questions & Related Prompts

#	RQ	Question	Additional Prompt
1		What is your role in the transition process for youth with intellectual disabilities?	*What specific things are you responsible for related to the transition process?*
2	1	What services are currently offered for youth with intellectual disabilities who are going through the transition process?	*Tell me more about__.*
3	1&2	What benefits do you feel these transition services offer to youth with intellectual disabilities going through the transition process?	*Tell me more about ____.* *Why do you believe__?*
4	1	Do you believe that these services that are being offered are meeting the needs of youth with intellectual disabilities who are going through the transition process? Why or why not?	*Tell me more about_.* *Why do you believe__?*
5	1	Do you believe there are gaps that exist in the services are currently offered for youth with intellectual disabilities that are completing the transition process? Why or why not?	*Tell me more about_.* *Why do you believe__?*
6	2	What additional services do you believe should be offered to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
7	2	What additional services do you believe should be offered? (*Ask only if they indicate additional services need to be offered #6)	*Tell me more about_.* *Why do you believe__?*
8	2	How do you feel transition services can better be provided to youth with intellectual disabilities?	*Tell me more about_.* *Why do you believe__?*
9	1	What are the barriers to accessing services for transition aged youth with intellectual disabilities?	*Tell me more about_.*

			Why do you believe__?
10	1&2	How do nonprofit organizations provide services to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
11	2	How do nonprofit organization services benefit youth with intellectual disabilities in the transition process?	*Tell me more about_.* *Why do you believe__?*
12	2	What additional supports that nonprofit organizations provide would be beneficial to youth with intellectual disabilities going through the transition process?	*Tell me more about_.* *Why do you believe__?*
13	1 & 2	Please share with me any other thoughts that you have about the role that you, your agency, or nonprofits have in supporting youth with intellectual disabilities going through the transition process.	*Tell me more about_.* *Why do you believe__?*

Those are all of the questions that I have for the interview.

Do you have any questions or anything you would like to add?

I will be emailing you a transcript of the interview once I have been able to have it transcribed. Once you get that email, I would appreciate it if you could take about 10 minutes and review the transcript for accuracy. If you have any questions or clarifications on the transcript, please feel free to email me that information or call me. If you do not send your transcript back with any questions or clarifications within 7 days of receipt, I will assume that it is accurate. You can also respond to the email within those 7 days letting me know if it is accurate if you would like.

I will email you a summary of the findings of the study after I have completed all requirements of the dissertation process. Do you have any final questions for me?

Again, thank you for your time. <end recording>

Appendix C: Transcription Service Agreement

Rev Information Security & Privacy Program Overview

The following document provides an overview of Rev's Information Security & Privacy program. We advise reviewing this document in its entirety.

Rev.com's advanced platform is a multi-tenant, multi-user, on-demand service providing unbeatable quality, speed, and value to clients and freelancers alike.

Rev.com may be securely accessed 24x7 through any Internet-connected computer with a standard browser, an application program interface (API), or mobile applications.

Objectives

Security is a critical part of our business. With our security & privacy program, we strive to achieve the following goals:

1.   Ensure that customer data is encrypted and inaccessible to other

customers and the public.
2.   Ensure that customer data is accessible to staff only to the extent

necessary to perform the required work.
3.   Prevent loss or corruption of customer data.

Maintain a redundant infrastructure with 99.9% uptime.

Provide timely notification in the unlikely event of downtime, data corruption or loss.

Provide continuous training for our staff on proper operation of our systems and best practices for security and privacy.

Our security policies and procedures are reviewed on an ongoing basis by the Rev security team, which is also responsible for their enforcement. All our staff have signed confidentiality agreements.

sales@rev.com | 737-207-9232 | rev.com/security

Rev

Information Security

Rev.com uses appropriate technical, organizational and administrative security measures to protect any information in its records from loss, misuse, unauthorized access, disclosure, alteration and destruction. Rev.com uses National Institute of Standards and Technology (NIST) guidelines as

a foundation for its security program including information security policies and incident response.
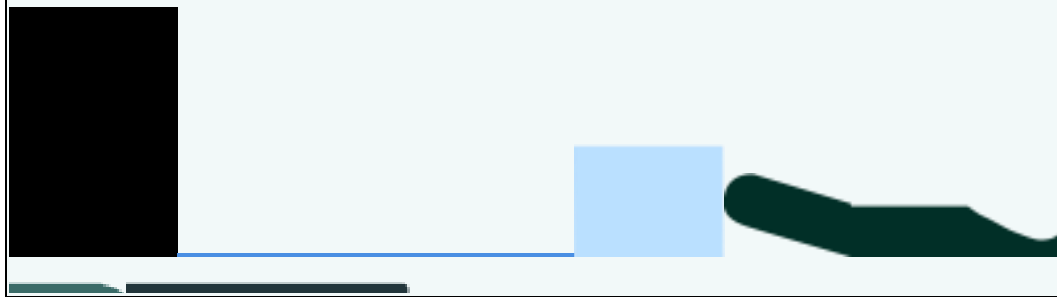
Privacy

Please see the Rev Privacy Policy (https://www.rev.com/about/privacy) for details on how Rev.com treats personal information and complies with privacy regulations.

Personally Identifiable Information

Rev follows best practices handling Personally Identifiable Information (PII) with guidance from the published General Data Protection Regulation (GDPR).

Rev never stores credit card information. Rev maintains a PCI certification for payment processing. Rev works with PayPal to ensure that all payments are secure and encrypted.

Employees

Employees are restricted to handle data required to perform their job. Our staff is trained on proper use of our systems and best practices for security & privacy. All employees have completed background checks and have signed confidentiality agreements.

Transcriptionists & Captioners

Revvers (our transcriptionists, captioners, etc.) are vetted through a rigorous screening process and receive training. All Revvers have signed NDAs and strict confidentiality agreements.

While actively working on a file, Revvers are required to use our secure and proprietary tools, only accessible through a web-based portal.

Revvers cannot download audio, video or transcript files as a general rule (configuration can be modified regarding audio/video download if the customer requests it). They are required to have a valid username and password.

Technical controls exist to block Revvers from accessing Rev.com while using VPN technology. If their account is deactivated, they are locked out of all platform customer resources including forums. All Revver account modifications and customer data access are logged.

Third Party Marketers

We do not share or sell information we collect to third party marketers.

Secure Infrastructure

All Rev.com services are hosted by Amazon Web Services (AWS). AWS maintains strict physical access policies that utilize sophisticated access control mechanisms.

Environmental controls such as uninterruptible power and non-destructive fire suppression are integrated elements of all data centers.
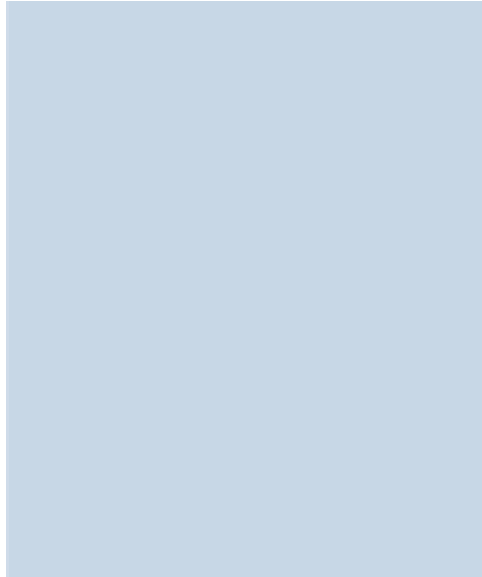
Secure Infrastructure (cont.)

Rev.com's infrastructure spans multiple AWS availability zones for high availability and utilizes amazon S3 for storage of data (https://docs.aws.amazon.com/AmazonS3/latest/dev/ DataDurability.html). AWS provides Distributed Denial of Service (DDoS) services.

Storage & Transmission

All customer files are encrypted both at rest and in transit. Communications between you and Rev servers are encrypted via industry best-practice protocols TLS 1.2 and AES-256. TLS is also supported for encryption of emails.

Backup & Recovery

Rev backs up data constantly to prevent any loss or corruption. All Rev & customer data is hosted at Tier IV or III+, SSAE-16, PCI DSS, or ISO 27001 compliant facilities in the United States.

Data Control & Deletion

Customers can purge video, audio, and/or document data from Rev systems at any point via the User Interface (UI) and can set up automated deletion policies via a support ticket.

Software Development Lifecycle

As a cloud service company, Rev.com releases software frequently so that clients may benefit from on-going development of new service
and security capabilities. Rev.com follows a defined Software Development Lifecycle (SDLC) that includes the application of security-by- design principles. Rev operates using an agile development methodology under which software development teams and management are tasked with ensuring that the SDLC process and design principles are followed.

Secure Service Operations

Access to production infrastructure is managed

in keeping with Role Based Access Controls (RBAC) and "Least Privilege". Access is limited to the Rev.com operations team. Sensitive product service data stored in service databases never leaves the production system.

Firewall rules are maintained so that production systems can only be accessed for maintenance from defined Rev.com locations using secured access mechanisms. Systems are maintained

in a hardened state with defined baselines for all host and network equipment. All changes to systems are tracked and managed according to well-established change management policies and procedures. The patch level of third-party software on systems is regularly updated to eliminate potential vulnerabilities.

Availability & Access

We maintain a redundant infrastructure with 99.9% uptime. All customer data is accessible to staff only to the extent necessary to perform the required work. And just like our customer support, our Security Team is on call 24/7 to respond to security alerts and events.

Breach Detection and Response

Rev.com utilizes network Intrusion Detection Systems (IDS) and network integrity management tools to continuously monitor the state of the system. Availability is continuously monitored using external monitoring tools. Application and infrastructure logs are aggregated and archived centrally, facilitating both analysis for suspicious access patterns and future forensic analysis. Regular external vulnerability scanning is also performed.

In the event of a breach, Rev.com has the ability to isolate components of the system for containment and maintain ongoing operations. Rev.com's incident response team is at the ready to notify customers of security impacting events according to contractual agreements.
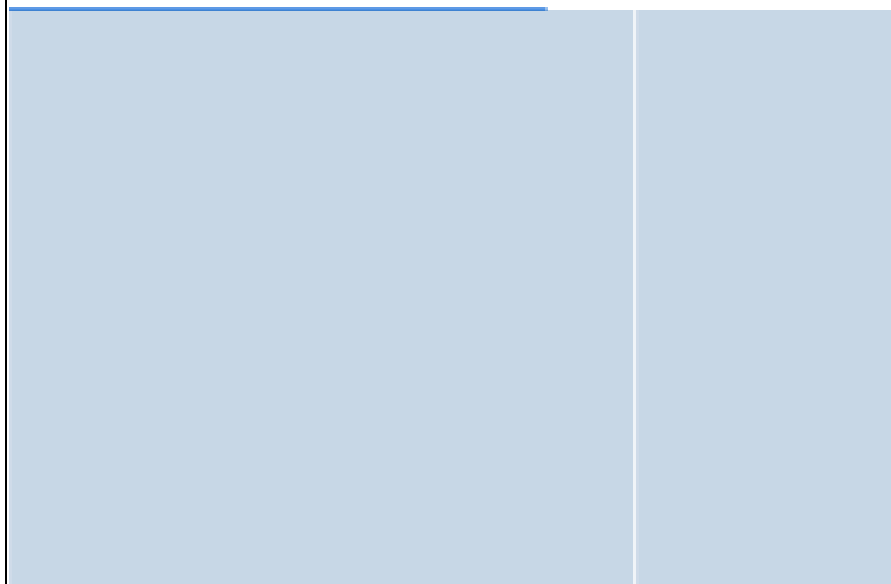
sales@rev.com | 737-207-9232 | rev.com/security

Appendix D: Human Subjects Training Certificate

This is to certify that:

Alecha Davis

Has completed the following CITI Program course:

Student's
(Curriculum Group)
Doctoral Student Researchers
(Course Learner Group)
1 - Basic Course
(Stage)

Under requirements set by:

Walden University

Completion Date 04-Jan-2022
Expiration Date N/A
Record ID 46024978

Not valid for renewal of certification through CME.

Verify at www.citiprogram.org/verify/?w7cd95019-580c-48de-a356-876269fc9948-46024978

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