



“Guide to Transition Planning and the New Massachusetts IEP”

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Transition planning has long been a critical component of special education, mandated by the Individuals with Disabilities Education Act of 2004 (IDEA 2004). Its purpose is to prepare students for life beyond high school in the areas of postsecondary education and/or training, employment, and independent living. While federal law requires transition services to begin at age 16, Massachusetts has gone a step further, requiring that postsecondary goals and transition services be included in a student’s individualized education program (IEP) by age 14.

However, the previous Massachusetts IEP format made it difficult to effectively integrate transition planning. Even with the introduction of a Transition Planning Form (TPF) to facilitate discussions, there was no consistent practice for embedding contents of the TPF into the IEP itself. As a result, much of the transition planning that was included ended up in the “additional information” section, limiting its visibility and coherence within the broader IEP process.

After over a decade of development, the Massachusetts Department of Elementary and Secondary Education (DESE) released a new IEP document last school year, which all districts are required to adopt during the 2024-2025 academic year. One of the most promising features of this new IEP is its heightened emphasis on transition planning, now driven more clearly by the student's vision and voice. Notably, the new format embeds transition planning directly into the structure of the IEP, making transition assessments a more visible and integral part of the process. While the legal requirements for transition planning remain unchanged, the new IEP format makes it easier to document these critical steps, ensuring that important aspects of transition planning are not overlooked.

So, what’s important to know about transition planning in the New MA IEP? Read on!

Student Voice and Vision are Up Front

One of the most significant improvements in the new IEP is its emphasis on the student’s voice and future vision. The “concerns” section is clearly labeled Student and Parent Concerns, empowering students to express what they want out of their IEP process. This is immediately followed by the Student and Team Vision, placing the student’s aspirations firmly at the center of the IEP process. Students ages 3-13 are encouraged to participate in visioning, fostering earlier goal setting, and encouraging teams to think explicitly about the student’s goals at younger ages. For students who will be ages 14-22, the IEP now more explicitly asks for the student’s postsecondary goals in key planning areas: education and/or training, employment, and independent living. This focus ensures that the IEP reflects the student’s ambitions and drives a more outcome-oriented process for postsecondary success.

Disability Categories are Transparent

The new IEP introduces a more transparent Student Profile section, where teams no longer need to select one “primary” disability category, making a student’s full profile more visible to all team members. While students can participate in the IEP process without fully understanding their disabilities, they can be more fully engaged if they know that they have one or more disabilities as defined by IDEA. Learning to disclose their disability and understand how it affects their learning, work, and daily life is a critical component of the transition process, empowering students to self-advocate and seek the supports they need. The transparency in the new IEP can help students gain a clearer understanding of the connection between their disabilities, their disability-related needs, and the accommodations and services they receive. Although transition-aged students are not required to participate in all aspects of their IEP, they must be invited when transition planning is discussed. Research shows that students who learn to lead their team meetings and self-advocate regarding their disabilities experience more success when transitioning to adulthood. This revision to the IEP offers a more balanced view of how multiple disabilities shape a student’s overall profile and enhances transparency in disability disclosure.

Assistive Technology as a Critical Component of the Student Profile

Assistive technology (AT) plays a vital role in helping students build independence and reduce reliance on prompting and support from adults or paid providers. The new IEP appropriately increases the visibility of assistive technology within the Student Profile. Whether used to support communication, mobility, learning, daily living skills, or work-related tasks, assistive technology empowers students to succeed both in school and in adulthood. The updated IEP format requires teams to specify whether these needs will be addressed through accommodations/modifications, goals/objectives, the service delivery grid, or another method, as documented in the Additional Information section. By thoroughly considering and documenting a student’s assistive technology needs, the IEP ensures students have access to the tools they need for greater independence and long-term success—a critical step in transition planning.

Life Skills and Self-Determination Can Be Explicitly Included at Early Ages

The new IEP organizes a student’s present levels of performance into four main areas—Academics, Behavior/Social/Emotional, Communication, and Additional Areas, including “activities of daily living.” Even before age 14, teams now have more explicit opportunities to describe strengths and needs in a broad range of areas that impact transition planning. Many students with disabilities require earlier planning and support to build independence in areas like personal care, home living, and community integration. When skill development takes longer, being thoughtful about life skills instruction, parent

training, referrals to community resources, and assistive technology is crucial at earlier ages. While not explicitly in the document, the new format also provides an opportunity for teams to evaluate self-determination skills at younger ages. Self-determination—encompassing self-awareness, self-advocacy, self-efficacy, choice-making, decision-making, goal setting, and self-regulation—is one of the strongest predictors of successful transition to adulthood. Current performance with these skills can be addressed across various categories (Academics, Social, Communication) or as a key “Additional Area.”

Current Performance Levels for Transition Services are Built-in

A major improvement in the new IEP is the explicit integration of transition assessment data and transition services within the IEP itself. For students turning 14 to 22, the IEP now includes a dedicated postsecondary transition planning section, which can also be used earlier if the team determines transition planning should start sooner. This section starts with documentation of the student’s current performance, strengths, preferences, interests, and disability-related needs in each postsecondary planning area—education/training, employment, and community experiences/postschool independent living. All of this documentation is informed by transition assessment data. Teams will also specify whether accommodations/modifications, goals/objectives, services, or other activities—documented in Additional Information—are needed to support the student’s transition planning. This ensures that all team members know exactly where to find details on how transition services will be implemented. As a caveat, all skills developed through special education support transition planning; thus, all general content in the IEP is relevant. Teams can confidently reference other parts of the IEP when completing the Postsecondary Transition Planning section to avoid unnecessary duplication of content.

Course of Study and Projected Graduation/Exit Date are Centrally Documented

Federal law has always required teams to identify a “course of study” that aligns with the student’s postsecondary goals, but there was no obvious place to include this in the old IEP. The course of study—a semester-by-semester plan of the classes the student will take—is a critical part of transition planning. For instance, a student aspiring to become a doctor will likely need lab science and advanced mathematics in high school. The new IEP provides places for teams to document the student’s course of study, the anticipated type of completion document (diploma, certificate of attainment, etc.), the student’s expected graduation date, and the student’s progress toward meeting exit requirements. This information is essential for monitoring and informing transition planning and creates a clearer link between the student’s transcript and progress toward their individualized postsecondary goals.

Transfer of Rights and Decision-Making

Adult decision-making is a significant milestone, and the new IEP emphasizes discussing the Transfer of Rights at least a year before the student turns 18. The IEP now includes designated space to document when both the student and family have been provided notice of this transfer and a copy of procedural safeguards. In addition, the new IEP encourages teams to discuss and document the student’s Decision-Making Options for adulthood. Although this is a requirement once the student turns 18, its more visible presence in the IEP encourages earlier conversations. This is crucial, because preparing for adulthood may require putting legal, educational, medical, and financial decision-making frameworks in place—processes that can take time to complete.

Community and Interagency Connections

Transition planning takes a village, and a central part of effective planning is to build a supportive network that extends beyond the protections of special education. The new IEP includes a dedicated section for community and interagency connections, ensuring that teams discuss and document

connections to community partners (such as independent living centers, job centers, pre-employment transition service providers, etc.) that are supporting the student. Additionally, the IEP incorporates prompts to ensure timely referrals to adult service agencies well before the student's exit. In Massachusetts, Chapter 688 Referrals—referrals to adult human services to engage in transition planning for students who will need continued support—must be completed at least two years before the student's expected exit from special education. The new IEP provides even more guidance to ensure that teams can make and document these referrals on time.

Final Thoughts

The new Massachusetts DESE IEP represents a significant advancement in integrating transition planning into the IEP process. As teams implement the new IEP, prioritizing adequate transition assessments will be crucial, as effective transition planning relies on thorough assessment processes that reflect each student's strengths, needs, and aspirations for the future. The law requires the use of age-appropriate assessments to identify the student's strengths, interests, preferences, disability-related needs, and, most of all, their postsecondary goals. Involving diverse voices, such as guidance counselors, is also essential for ensuring a seamless connection between a student's course of study and postsecondary goals. While the law has not changed, the new IEP makes transition planning more transparent. More importantly, it places the student's vision and voice at the forefront of the process.

Additional Resources

- Download Massachusetts IEP Form and Related Resources including the Transition Planning with the New IEP Quick Reference Guide and Discussion Questions to Get Ready for My Yearly IEP Meeting at <https://www.doe.mass.edu/sped/improveiep/>
- Learn more about the specific language in the IDEA regulations that relate to important transition topics at <https://www.pacer.org/transition/learning-center/laws/idea.asp>
- Explore NESCA Video Resources including webinars on transition planning, postsecondary learning and training options, fostering self-awareness and self-advocacy and more at <https://nescanewton.com/video-resources/>
- Learn about NESCA Transition Service offerings for students, schools, and families at <https://nescanewton.com/transition/>

About the Author

Kelley Challen, Ed.M., CAS, is an expert transition specialist and national speaker with over 20 years of experience supporting youth and young adults with diverse developmental and learning abilities. Since 2013, she has served as Director of Transition Services at NESCA, offering individualized transition assessments, planning, consultation, coaching, and program development. She specializes in working with students with complex profiles who may not engage with traditional testing tools or programs. Ms. Challen holds a BA in Psychology and a Minor in Hispanic Studies from The College of William and Mary, along with a Master's and Certificate of Advanced Graduate Study in Risk and Prevention Counseling from the Harvard Graduate School of Education. She is a member of CEC, DCDT, and COPAA, believing it's vital for all IEP participants to have accurate information about transition planning. Ms. Challen has also been actively involved in the MA DESE IEP Improvement Project, mentored candidates in UMass Boston's Transition Leadership Program, and co-authored a chapter in *Technology Tools for Students with Autism*.