



Collaborative Assessment Guide for Transition Planning

National Technical Assistance Center on Transition:
the Collaborative (NTACT:C), 2024

Acknowledgements

NTACT:C hosts “toolkits” of resources on a variety of topics, related to secondary education and services for students with disabilities and the capacity building associated with improving such education and services. These toolkits provide an overview and then step-by-step guidance and resources on the specific topic. You'll find resources on content such as competitive integrated employment, or interagency agreements; as well as strategies for evaluating your work, or hosting a transition fair.

The Collaborative Assessment Guide for Transition Planning (CAG) builds upon and replaces the *Age Appropriate Transition Assessment Toolkit* (Kortering et al., NSTTAC, 2007; NTACT, 2016). NTACT:C appreciates the input of practitioners, state agency personnel, and federal agency staff for their input in developing this resource. The contents of this toolkit were developed under a grant (H326E200003) from the U. S. Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government. While permission to use this publication is not necessary, the citation should be: National Technical Assistance Center on Transition: the Collaborative (2024). Collaborative Assessment Guide for Transition Planning. M. Stoehr, M. Diehl, M. Morningstar, D. Rowe, B. K. Simmons, C. Fowler, D. Lattin, J. Vicchio, E. Wall.

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Introduction

The NTACTION: Collaborative Assessment Guide for Transition Planning (CAG) is intended to help students, family members, educators, vocational rehabilitation (VR) counselors, human services and health agency staff, and other partners develop a coordinated assessment approach for transition planning and service delivery. The set of resources which make up the CAG include sections designed for students and families. It also includes a supplement to highlight the assessment requirements of the Individuals with Disabilities Education Act (IDEA, 2004) and the Rehabilitation Act of 1973 (Rehab Act), as amended by title IV of the Workforce Innovation and Opportunity Act (WIOA) as well as a supplement of Definitions referenced throughout. Finally, it includes a supplement of sample assessment tools. This Guide and the five related supplements are each located at this link: <https://transitionta.org/transition-assessment/> and linked from this document.

The assessment process for identifying post-school goals and relevant transition services for students and youth consists of six separate but interconnected processes



Determining What to Assess

Determining Stakeholders

Selecting Appropriate Assessments

Conducting Assessments

Reviewing Assessment Results and

Using Assessment Data

Section 1: Determining What to Assess

Results from initial assessments should be the starting point for planning and the driving force to determine individualized services needed to achieve post-school goals. Types of skills* to assess include:

- Academic knowledge (i.e., core academic and career technical education coursework skills and content);
- Academic and work behaviors (e.g., attendance, productivity, participation);
- Process-oriented skills needed to access content (e.g., learning strategies, self-management, research and synthesis, technology);
- Self-determination skills or mind-sets including self-advocacy, problem-solving, persistence, goal setting, self-efficacy;
- Receptive and expressive communication, including use of augmentative communication tools or strategies;
- Prosocial behaviors to effectively engage in learning, earning, and adult living;

- Re-entry needs of youth placed out-of-home for re-entry into their families, schools, and communities;
- Career development and employment skills;
- Adult roles and responsibilities skills (e.g., cooking, financial literacy, health, transportation, civic engagement); and
- Specific knowledge of college and career cultures

* the above were informed by Rowe, Mazzotti, Hirano, and Alverson (2015); Morningstar, Lombardi, and Test (2018); Lombardi, Freeman, and Rifenbark (2018); Mazzotti and others (2021) – see References at <https://transitionta.org/transition-assessment/>

One size doesn't fit all when it comes to assessment. When determining what to assess or what additional assessment information is needed, remember the basic questions assessments are trying to answer:

- Where is the individual presently?
- Where is the individual going?
- How does the individual get there?

Review existing information available about the student or youth, this will assist you in determining what additional information is needed and what type of assessment would be most beneficial.

To assist teams in gathering existing information it may be helpful to have a conversation on how best to collectively organize existing assessment information and discuss how additional data will be incorporated into what is already known about the young person. Although this isn't a legislative requirement, student/ youth level teams find it a helpful process to facilitate coordinated planning and identifying next steps.

Below are two documents that teams have used for this process.

Positive Personal Profile

The Positive Personal Profile (PPP; Tilson G., n.d.) is an easy tool to implement. Many teams have used the PPP to collectively gather information, including assessments, observations, interviews, and discussions with the student. The PPP is designed to assist the student in outlining their strengths, interests, and dreams, as well as areas where they may need support or accommodations. Multiple sources of information should be included, and the PPP should be kept updated as new information is obtained. Another benefit of the PPP is that it can be used as a worksheet by the student to organize information for a resume or prepare for an interview where the student will need to highlight their skills for an employer.

Sample Completed Positive Personal Profile

Date of PPP: October 20, 2023

PPP Completed by: Michael Stoehr, Brenda Simmons

Name: Tyler

Birthdate:

- **Dreams and Goals**
 - Car Mechanic
 - Basketball teacher assistant
 - Working independently
 - Learn to drive
- **Talents**
 - Athletic- basketball, soccer
 - Video games
 - Teamwork
 - Leader
- **Skills and Knowledge**
 - Basic computer skills including using the internet
 - Telling time, counting money
 - Math skills
 - Operates a commercial dishwasher
 - Basic culinary skills
 - Basic carpentry skills
 - Basic computer skills
 - Early childhood experience
- **Learning Styles**
 - Hands-on learning
 - Wants to be talked through a new task
 - Wants to keep active and moving
- **Interests (Include school-sponsored activities)**
 - Sports
 - Video games
 - Music
 - Computers
 - Travel, especially the beach
 - Likes to do different things, not repetitive
 - Likes working with older adults
- **Positive Personality Traits**
 - Talkative
 - Social
 - Outgoing
 - Happy
 - Confident
 - Competitive
 - Helpful
 - Curious
 - Adaptable
- **Temperament**
- **Values**

- Respectful
- Calm
- Helping people
- Being independent
- Feeling of accomplishment
- **Environmental Practices**
 - Physical job so he can move around
 - Work with some people but not a large group
 - Inside rather than outside
 - Afternoon or evening job
 - Quiet, calm, clean environment
- **Dislikes/quirks/idiosyncrasies**
 - Reading
 - Washing cars
 - Mowing, other lawn work
 - “I’m not a morning person.”
- **Work Experiences**
 - Head Start: set up breakfast, wipe tables, assist with student projects, play with kids
 - RAMPS: PE teacher Assistant, taught students new skills, lead exercises, assist with supervision of students
 - Lawn mowing
 - Washing cars at Dad’s car repair business
 - Hilltop Grill: wiped tables, used dishwasher, remove trash, recycle cardboard
 - MD Theater: take out trash to dumpster, vacuum, sweep, mop
- **Support System**
 - Mom and Dad
 - Mr. K (Special Olympics Basketball Coach)
 - School
 - Friends, especially S (graduated last year)
 - Grandfather
- **Specific Challenges**
 - Multiplication and division
 - Some technology
 - Working with people when he doesn’t understand what they are saying
 - Hard to sit for a long time
- **Accommodations/Solutions**
 - Calculator
 - Some technology
 - Frequent breaks to move if sitting for a while
- **Transition Assessments Next Steps**
 - Guidance Counselor: Will have Tyler complete O*NET career Interests Inventory

- School Case Manager: Will work with Tyler to complete his Student/Individual Education Program (IEP) Transition Planning interview to identify strengths, skills and goals
- Special Education Teacher: Will review Tyler’s current progress monitoring data and post-secondary goals to determine and develop Tyler’s Measurable Annual Goals for his upcoming IEP.
- Vocational Rehabilitation Counselor: Tyler’s dad shared he has a friend who is a car mechanic. VR counselor will work with Tyler and his dad to set-up an informational interview at a local car dealership with the car mechanic. A job shadowing experience will be set-up at the local assisted living center to help Tyler explore different jobs available working with older adults.

Transition Assessment Planning Form

The Transition Assessment Planning form (Gaumer Erickson, A.S., Morningstar, M. E., Lattin, D.L., & Cantrell, L. (2008). *Transition Assessment Planning Form*. Lawrence, KS: University of Kansas, Transition Coalition is another tool that can be used to collaboratively gather assessment information. The form is divided into domain areas and provides areas of assessment to consider when working with a student.

The planning form takes a team through the questions of:

- What do we already know about the student?
- What do we need to learn about the student?
- How will we gather this information?
- Who will gather this information?
- When will the information be gathered?

Sample Completed Planning Form

Transition Assessment Domain: Current and Future Employment

Areas of Assessment to Consider	What do we already know about the student?	What do we need to learn about the student?	How will we gather this information?	Who will gather the information?	When will the information be gathered?
Assistive Technology	Uses limited AT		Observation Interview	School Counselor	
Temperament/ Personality			Situational Assessment <i>Work Personality Profile</i>	VR Sp. Ed Teacher	

			<i>Psychological Assessment</i>	School Psychologist	
Manual Dexterity			Work Sample VALPAR	Sp. Ed Teacher VR	
Work Environments			Ecological Inventory <i>The Environmental Job Assessment Measure: E-JAM</i>	Sp. Ed Teacher	

Transition Assessment Domain: Education and/or Training

Areas of Assessment to Consider	What do we already know about the student?	What do we need to learn about the student?	How will we gather this information?	Who will gather the information?	When will the information be gathered?
Academic Achievement	Loves reading Likes English & Social Studies best Wants to go to college but not sure of what to study	We first need more information about how she is doing in her classes – grades, accommodations, interests, concerns, etc.	Curriculum-based Assessments; Grades; ACT <i>Study Skills Inventory</i>	School	
Learning Styles	Has difficulty in classes due to visual and auditory distractions	More specific information about these issues and possible accommodations	Survey Interview Observation Rating Scale <i>C.I.T.E. Learning Styles Instrument.</i>	School	
Intelligence			IQ Test	School	

Accommodations	Does not use AT	More on what Accommodations she needs in classes to prepare for college	Survey Interview Observation	School VR?	

Transition Assessment Domain: Independent Living

Areas of Assessment to Consider	What do we already know about the student?	What do we need to learn about the student?	How will we gather this information?	Who will gather the information?	When will the information be gathered?
Self-Awareness	More aware of her differences but developed some self-confidence	How she feels about herself and her disability – self-efficacy, self-esteem	Survey Interview Rating Scale	School	
Self-Determination/ Self-Advocacy	Wants to increase her self-determination	Her skills with self-determination	Survey Interview Rating Scale <i>AIR Self-Determination</i>	School	
Money Management/ Public Benefits and Work Incentives		Can she use a checking account/money card? Budgeting? Paying Bills?		School VR support	
Home Living	Lives with her Father Takes responsibility for some basic tasks, when asked	Independent living skills – when she is going to college and	Survey Interview Rating Scale <i>Ansell-Casey Life Skills</i>	School	

		living in a dorm or apartment	<i>Informal Assessments for Transition: Independent Living and Community Participation.</i>		
Recreation & Leisure Interests			Survey Interview	School	
Transportation		Can she use public transportation?	Interview Observation	School VR support?	
Personal Safety			Interview Observation	School	
Medical & Health			Interview Review of records <i>Transition Health Care Checklist</i>	School	
Communication	Does not know sign language	Possible Accommodations; how she communicates best	Survey Interview Rating Scale Standardized Assessment	School	
Adaptive Behavior					
Interpersonal Relationships	Wants to improve her social skills	More about her specific social skills		School	
Community Participation	Spends time at the mall with girlfriends			School	

Section 2: Determining Stakeholders

Evident in the sample assessment planning documents in the previous section, several individuals may be involved in the process. While the “school” may be responsible for collecting and summarizing data that are gathered in many cases. The sources of those data may be family members, work supervisors, various individuals within the school, or any external service providers. Of course, the primary stakeholder in the assessment process is the student and

their family. For purposes of this guide, education and vocational rehabilitation are the other significant stakeholders in the process. Each agency needs the assessment results for different and interrelated planning purposes.

Depending upon the Age of Majority of a State, some schools require a signed release from the parent/guardian before they can share school records, results of assessments, or even the names of the students they would like to refer for VR services. This requirement varies from State to State and school to school. Review and discuss the method of releasing records, assessment results, student names and/or obtaining parental consent at the beginning of each school year, to ensure smooth and timely service provision, and to avoid duplication of services.

Parental and student consent should be obtained pursuant to State law, as well as policies of the educational programs and the VR agency.

Special Education

From an **Education** perspective, results of transition assessment should:

- Provide the basis for course selection; inform instructional strategies; identify necessary accommodations to access instruction; and environments that address the student's needs, while capitalizing on their unique talents;
- Provide self-knowledge of their strengths and interests needed as they develop college and career readiness skills and engage in opportunities to expand career development and college preparation.
- Support students to better understand their social emotional, personal engagement, and communication skills needed for successful relationships and community engagement;
- Lead the students understanding between their individual academic program and post-school ambitions;
- Form the basis for the development of measurable annual goals (MAGS) in the IEP;
- Provide information needed to identify IEP measurable postsecondary goals (MPGs) for postsecondary education or training, employment, and independent living as a part of transition planning in the IEP;
- Assist in identifying needed transition services that will assist the student to reach their MPG's in employment, postsecondary education and training, and daily living if appropriate
- Facilitate the student in better understanding the connection between their individual academic program and post-school ambitions, often providing the key that motivates them to engage in learning and to stay in school.

Vocational Rehabilitation

From a VR perspective, results of assessment should:

- Assist in determining eligibility and priority for VR services based on documented disability and services needed;
- Assist in determining rehabilitation needs that will be identified on the Individual Plan for Employment (IPE);
- Assist in gaining a better understanding of career pathways that align with the student's interests, skills and abilities;
- Identify projected post school employment outcomes and employment goals;
- Inform how VR eligible students with disabilities engaged in any of the five required pre-employment transition services will fully benefit from those activities.

A Collaborative Assessment Process

There is an overlap between education and VR when considering the results of assessment. School and VR personnel are encouraged to partner closely to share and coordinate diagnostic assessments for a student with a disability during the transition planning process.

Some ways this collaboration can work include:

- The IEP team may provide updated testing/diagnostics as part of the transition planning process, particularly when the student's post-school outcome involves college or vocational training;
- VR may use existing information from the school such as medical, psychological, or academic/intelligence testing to assist in the determination of eligibility, assignment of a priority category, or to identify the student's rehabilitation needs; and
- If a student is referred to the VR program, and a review of existing data determines additional formalized testing is needed to establish eligibility or to determine appropriate nature and scope of VR services, VR agencies may purchase additional formal or informal assessments.

Formal assessments may include diagnostic testing or vocational evaluations. Informal assessments may include the use of work in real situations to assess and develop the capacities of the student to perform adequately in a work environment.

Under the Rehabilitation Act, as amended by WIOA, the VR program can be categorized as a continuum of services, with pre-employment transition services as the first step along that continuum for a student with disabilities who is eligible or potentially eligible (i.e. have not yet applied for VR services). Pre-employment transition services provide an early start to job exploration; and assist the student with disabilities in identifying career interests which may be further explored through additional VR program services, such as transition services and other individualized VR services.

While pre-employment transition services are not meant to be used as assessments to determine eligibility for the VR program, these services provide an early start in career exploration that begin a student's journey and assist in developing a continuum of services. The VR counselor can monitor the student's progress and participation in one or more of the five

required pre-employment transition services and use this information for further vocational planning and VR services. For example, the student's participation in early work-based learning experiences may assist in defining a vocational or employment goal and may identify the supports and/or accommodations needed to achieve high quality employment outcomes.

If a student needs more intensive individualized VR services, beyond the scope of pre-employment transition services, they can apply for VR services, and if found eligible, access the full array of VR services available to assist eligible individuals in achieving their employment goals.

Section 3: Selecting Appropriate Assessments

One size does not fit all when selecting an assessment for a student. When determining which assessment to use, consider questions related to each student's specific strengths, interests, needs and preferences. Gather information regarding:

- Interests of student;
- Perceptions of student, families/guardians, or other school personnel related to student's skills or behaviors; and
- Assess the actual demonstration of a student's skills.

Selected assessment instruments and methods should help the student to answer the following questions:

- Who am I?
- What are my unique talents and interests?
- What do I want in life, now and in the future?
- What are some of life's demands that I can meet now?
- What are the main barriers to getting what I want from school and my community?
- What are my options in the school and community for preparing me for what I want to do, now and in the future?

Primary Consideration when selecting assessment are:

- Who needs the information obtained from the assessment?
- What information is needed for transition planning and instructional purposes?
- What decisions can be made using the transition assessment data?
- Will the assessment meet the needs of the student and be effective in revealing accurate information?

In selecting an assessment, it is important to minimize bias as certain informal and formal assessments may have racial/ethnic bias, gender bias, and socio-economic bias. Additionally,

we need to fully understand and check our own biases to ensure they do not negatively impact the assessment process.

Culture defines the values, beliefs, and practices surrounding when and how students transition to adulthood. Culture also defines the beliefs and practices surrounding transition for students with disabilities and special health care needs as they progress from one stage to another in their lifecycle. Culture influences the beliefs and practices of families and students regarding transition from school to post-school activities within the contexts of health care, employment, postsecondary education, and independent living. When considering appropriate assessment practices for students transitioning from school to post-school activities, it is important to remember to be RESPECTFUL; that is to consider (R) religion and spirituality, (E) economic class background, (S) sexual identity, (P) psychological maturity, (E) ethnic and racial identity, (C) chronological stage, (T) trauma, (F) family background, (U) unique physical characteristics, and (L) geographical location. Throughout the assessment process, cultural considerations should provide a structure for discussion and self-examination, as well as to facilitate discovery of unique skills and abilities that inform a student's postsecondary goals.

Additional key considerations when selecting instruments and methods that are appropriate for the student you are working with include the nature of their disability (e.g., reading level and general ability level), their post-school goals (e.g., college versus other training options or immediate employment), and community opportunities (e.g., local training options, employers and adult service providers). The person conducting the assessment must complete it using the student's preferred mode of communication, especially when working with students who are deaf or hard of hearing. In addition, consider what types of technology may be needed for students, particularly those who have sensory impairments. As an example, students with more complex disabilities would be best served by a person-centered planning approach (Brady et al., (2016); Browder et. al., (2014). The nature of their disability may preclude the relevancy of many standardized assessments. Notable exceptions might include interest inventories that do not require reading (e.g., Becker's Reading Free Interest Inventory - Revised, Wide Range Interest and Opinion Test – Revised) and other instruments that require minimal reading levels (e.g., Career Decision Making System, Self-Directed Search Form E). Similarly, some students may need special accommodations during the assessment process. Informal and formal measures may be used to assess the four suggested categories: including (a) academic, (b) self-determination, (c) vocational interest and exploration, and (d) adaptive behavior/ independent living.

Transition assessments may be paper and pencil tests, structured student and family interviews, community, or work-based assessments (situational) and curriculum-based assessments. These assessments or procedures come in two general formats –formal and informal. Formal assessments are designed to learn about a wide variety of skills in various areas (e.g., vocational, academic, social). They can include published tests, normed tests, and scores that compare a student to others and should be considered a starting point in completing assessments.

Informal assessments are designed to observe the student in various academic and work experiences/situations. Informal assessments may also include published assessments but are not developed to provide scores that compare a student's results to those of other students like formal assessments. Additionally, curriculum-based assessments are informal assessments as well as assessments designed by a teacher or VR counselor.

Examples of formal and informal assessments include:

Formal Assessment Examples	Informal Assessment Examples
Achievement tests Aptitude tests Adaptive behavior scales Intellectual functioning assessment Temperament inventories Self-determination scales Pre-vocational-employability scales Interest inventories Learning Style Inventories	Situational assessments Work based learning experiences Interviews Direct observation Curriculum-based assessment Social history Surveys Rating scales for specific areas

[Sample Assessment Tools](#)

Section 4: Conducting Assessments

Conducting assessments will vary depending on the actual instrument(s) and procedures being used and various student characteristics (Neubert, and Leconte (2013)).

When you meet with the student to complete the assessment, you begin to collect and record information. Sources of information should be the student, their family, and individuals/agencies with knowledge of the student and their needs.

Some guiding areas for consideration are:

- Utilizing a multi-disciplinary approach (i.e. involve multiple people, over multiple days, using multiple assessments);
- Determining any time constraints the student and/or evaluator have in completing the assessment;
- Ensuring the assessment occurs in environments that resemble actual vocational training, employment, or independent living, situations;
- Being familiar with the assessment instrument, and having the right materials on hand (e.g., test protocols, related materials, etc.);
- Recognizing and honoring a student’s cultural and linguistic differences, building rapport, and ensuring the student has an effective way to communicate responses; and
- Providing the student with their needed accommodations and assistive technologies.

Prior to meeting with the student, prepare by determining:

- What questions might you ask the student?
- What question might you ask the family?
- What questions might you ask educators?
- What questions might you ask VR staff?
- What questions might you ask other agency partners?

In School Assessment Mapping

School Assessment Mapping is a process educators can use to collect information in middle and high schools on currently used assessments and related activities by grade level in general and special education. Once information on current assessment activities is gathered, it can be reviewed and organized by grade level, staff responsible for implementing, and a student's specific areas of need. As noted, assessment should be an ongoing process throughout the entirety of a student's schooling. In conducting the school mapping process gaps and duplications in the assessment process can be recognized and corrected.

The following is an example of a School Assessment Map:

School Assessment Map Examples

Grade 7

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Family Transition Survey
 - Student Transition Survey
 - Electronic career portfolio program "My Career Journey"
 - PA Career Zone – Assess Yourself – Quick Assessment
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - 4Sight
 - State Assessment
 - Brigance
 - CBA
 - CDT

Grade 8

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program "My Career Journey"
 - "Adventures in Reality" via guidance
 - PA Career Zone – Budgeting for Life
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - 4Sight
 - State Assessment
 - Brigance
 - CBA
 - CDT

Grade 9

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program "My Career Journey"

- Family Transition Survey
- Student Transition Inventory “Career Cruising”
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - Study Island
 - 4Sight
 - Practice SAT
 - State Assessment
 - Brigance
 - CBA
 - CDT

Grade 10

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program “My Career Journey”
 - Student Transition Inventory “Career Cruising”
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - Student Island
 - 4Sight
 - Brigance
 - Practice SAT
 - CBA
 - CDT

Grade 11

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program “My Career Journey”
 - Family Transition Survey
 - Student Transition Inventory “Career Cruising”
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - Study Island
 - 4Sight
 - State Assessment
 - Practice SAT
 - CBA
 - CDT

Grade 12

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program “My Career Journey”
 - Student Transition Inventory “Career Cruising”
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)

- Study Island
- CBA
- Brigance

Grade 12+

- Interest/Preference Assessments (Transition Coordinator and/or Special Ed Teacher/Case Manager are responsible)
 - Electronic career portfolio program “My Career Journey”
 - Family Transition Survey
 - Student Transition Inventory “Career Cruising”
- Academic Assessments (Special Ed Teacher/General Education Teacher are responsible)
 - Study Island
 - Brigance
 - CBA
 - CDT

Section 5: Reviewing Assessment Results

A crucial step in the assessment process is scheduling time for the professional to review the assessment results and develop an understandable summary for the student and their family. Interest inventories, interviews, and observations rely on the person administering the assessment to analyze and interpret the results. When reviewing assessment results, individually or as a team, practitioners should look for actionable knowledge (i.e, information that can be used/shared to plan or identify next steps). Additionally, when reviewing assessment results, you should determine how the results will be communicated to the student and family, as well as how information will be communicated/shared with other team members. When reviewing assessment results from an individual assessment, it is important to consider how the assessment results match or conflict with other information that is known about the student. A lot of circumstances can impact a student’s performance on an individual assessment so results of an individual assessment should be used in combination with other assessment information that is known about the student.

A general process that can be used as you conduct and begin to review results is:

- Gather and organize;
- Review;
- Summarize;
- Interpret in everyday, functional language; and
- Translate into recommendation

Assessment results should be gathered from multiple domains to identify where the student is currently functioning and what is needed to reach their goals. To effectively do this, cross-agency collaboration is needed, as is the development of a process to share results. One initial strategy that can be used to begin this cross-planning process is to take a holistic approach

when working with a student. Then, as each agency is supporting the student, collective information can be shared and contribute to the assessment process. As data is shared, it can inform the development of plans (e.g., IEP, IPE, or ISP), as well as a coordinated approach to support a student in planning and achieving their next steps and goals.

It is important to note that this is not just a best practice, but it is also a requirement that the VR counselor coordinate services provided in the IPE with goals and objectives in the student's IEP. In accordance with the Rehabilitation Act, as amended by WIOA, 34 C.F.R. § 361.46 (d) Coordination of services for students with disabilities, the IPE for a student with a disability must be coordinated with the IEP or 504 services, as applicable, for that individual in terms of the goals, objectives, and services identified in the education program.

Section 6 Using Assessment Data

Once results are analyzed, they can be used to assist the student and those supporting them in:

- Developing and determining post-secondary and employment goals;
- Developing IEPs, IPEs, ISPs;
- Person-centered planning;
- Determining appropriate transition services and/or VR services; and
- Guide instruction and community-based activities/services

Incorporating assessment information in the IEP/IPE/ISP

- Does the IEP post-secondary employment goal align with the projected post-school employment outcome/employment goal on the IPE?
- Do the IEP post-secondary goals for education/training, employment, and independent living align with the projected outcome actions of the ISP?
- Every child who receives special education services or related services must have an IEP. An IEP that includes transition services would include information about the student's Strengths, Preferences, Interests, and Needs (SPIN), and would also include information of the student's developmental and functional performance. Each State determines and defines the age range for a student who receives transition services under IDEA (required by age 16, but may be younger).
- An IPE must be developed in accordance with 34 C.F.R § 361.22(a)(2), and as early as possible during the transition planning process, and not later than the time a student determined to be eligible for VR services leaves the school setting or, if the VR agency is operating under an order of selection, before each eligible student able to be served under the order of selection leaves the school setting. Although students with a disability may receive pre-employment transition services regardless of whether they have applied to the VR program, in order to receive individualized VR services, they would need to apply and be determined eligible for VR services under an IPE. The Rehabilitation Act, as amended by WIOA, allows for the description of a projected post-school employment goal, if the individual is a student or youth with a disability. As such, an IPE (34 C.F.R. § 361.46(a)(1)) for a student with a disability may contain either a

specific post-school employment outcome or a more general, projected post-school employment outcome.

An IPE for a student with a disability must include the specific services, including pre-employment transition services, transition services and other VR services, needed by the student for the achievement of the employment goal. The IPE must also include the timelines for the achievement of the employment outcome; a description of the entities chosen by the individual that will provide the VR services; the methods to procure those services; criteria to evaluate progress toward achievement of the employment outcome; and the responsibilities of the individual and VR agency. When working with a student determined eligible for VR services, the VR counselor shall develop an IPE with the student and their family or representative, within 90 days from the date of application, and prior to a student's exit from high school.

- The IPE should be developed in consideration of the student's IEP goals or the services provided under Section 504 of the Rehabilitation Act, as amended by WIOA, in terms of the goals, objectives, and services identified in the education program. The two plans should be used to inform the transition planning process and address the student's needs.

Education's Use of Assessment Data for Transition Planning

The following outlines an effective practice model for using assessment data for transition age students:

- **Begin the process:**
 - Conduct and document results of transition assessments before the IEP for the age/ grade for transition planning mandated in your state (16 or younger).
- **Identify Interests and Preferences**
 - Assessment data should allow for documentation by the student and IEP team of:
 - Interests: a measure of opinions, attitudes, and preferences
 - Preferences: what the student values and likes
- **Post-School Goals**
 - Once the student has begun to determine career areas of interest and other adult living interests and the preliminary postsecondary goal areas can be determined:
 - Post-Secondary Education and Training
 - Employment
 - Independent Living
- **Further Assess Abilities, Aptitudes, and Skills**
 - Interests and goal identification can inform further assessment of:
 - Abilities: talents or acquired skills

- Aptitudes: characteristics that inform us of a student’s learning strengths or proficiency in a particular area
- **Information from Other Stakeholders**
 - Assessment data gathered from and shared by other stakeholders can also inform post-school goal development and the need for further instruction and experiences
- **Set Post-School Goals**
 - Based upon the information gathered and reviewed in the previous steps work with the student in determining their post-secondary goals related to:
 - Post-Secondary Education and Training
 - Employment
 - Independent Living
- **Courses of Study**
 - Based upon the student's post-secondary goals design the student's courses of study
- **IEP Development**
 - Based upon the previous steps, develop the student's IEP. Be sure that the Present Educational Level Section includes:
 - Succinctly describes the student
 - Describe instructional level versus grade level expectations
 - Refer to summative, formative, benchmark assessments (and diagnostic as appropriate)
 - Directly relate to assessments and evaluation information
 - Provide information on student’s rate of progress
 - Is reflective of the post-secondary goals
 - Assessment information guides the development of IEP goals and objectives
- **Ongoing: Coordinate Process**
 - Throughout the IEP year continue to progress monitor the student's measurable annual IEP goals, engage the student in transition related activities and provide ongoing assessment.
 - This multiple step process would continue each year up until the student graduates.
- **Summary of Performance**
 - In the final year prior to a student's graduation from high school, the student is provided with a summary of their academic achievement and functional performance, which includes recommendations on how to assist the student in meeting their postsecondary goals. This information should be based upon the

assessment, activities, and services that the student has received throughout the secondary transition process.

VR's Use of Assessment Data

The VR program uses assessment for determining eligibility for VR services, to assign a priority for an order of selection if a State has implemented such an order, and to determine the vocational rehabilitation needs of an individual. Assessments are also utilized to determine employment goals, as well as the nature and scope of services to be included on an IPE.

There is nothing in the statute or regulations that permit a VR agency to deny a VR application based upon a minimum age. The VR agency should take all applications regardless of age and whether the student has participated in or is currently receiving pre-employment transition services. As such, the VR agency does not provide or conduct assessments for students with disabilities based on an age limit or range. Furthermore, age is listed as a prohibited factor in the assessment for determining eligibility for VR services (34 C.F.R. § 361.42(c)(2)(ii)(A)).

VR agencies also conduct assessments prior to a determination that an individual with a disability is unable to benefit from VR services in terms of an employment outcome because of the severity of an individual's disability, or that the individual is ineligible for VR services. Prior to determining that an individual is unable to benefit from VR services, the VR agency must conduct an exploration of the individual's abilities, capabilities, and capacity to perform in realistic work situations through trial work experiences (34 C.F.R. §361.42(e)).

Potentially Eligible

- No formal assessments
- Explore - Interest inventories, questionnaires, surveys to explore vocational interests and identify career pathways
- Discover - observe student performance during work-based learning experiences and workplace readiness training

Eligibility Determination

- Review existing data - counselor observations, education records, information provided by the student/family/medical staff/school, information used by education officials, and determinations made by officials of other provider agencies to determine if an applicant:
 - 1. Has a physical or mental impairment that constitutes or results in a substantial impediment to employment for the applicant;
 - 2. Requires VR services to prepare for, secure, retain, advance in, or regain employment that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interest, and informed choice.

IPE Development

- To the degree needed, conduct an assessment to determine an individual's vocational rehabilitation needs, as well as the student's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, including the need for supported employment.
- To the degree necessary for vocational planning, conduct an assessment of the interests, interpersonal skills, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the eligible student.
- To the degree necessary for vocational planning, conduct an appraisal of the patterns of work behavior of the student and services needed for the student to acquire occupational skills and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance, including the use of work in real job situations to assess and develop the capacities of the student to perform adequately in a work environment

VR Services

- For students with a projected post-school employment outcome, the student's interests, skills, abilities, capabilities, strengths, aptitudes (i.e. cognitive, academic) may be assessed periodically to facilitate the student's exploration and identification of an employment goals

Collaborative Use of Assessment Results

[Community Resource Mapping](#) provides another opportunity to apply the results of a coordinated assessment process for transition-age students and youth.

There is an overlap between education and VR when considering the results of assessment. School and VR personnel are encouraged to partner closely to share and coordinate diagnostic assessments for a student with a disability during the transition planning process.

Some ways this collaboration can work include:

- The IEP team may provide updated testing/diagnostics as part of the transition planning process, particularly when the student's post-school outcome involves college or vocational training;
- VR may use existing information from the school such as medical, psychological, or academic/intelligence testing to assist in the determination of eligibility, assignment of a priority category, or to identify the student's rehabilitation needs; and
- If a student is referred to the VR program, and a review of existing data determines additional formalized testing is needed to establish eligibility or to determine

appropriate nature and scope of VR services, VR agencies may purchase additional formal or informal assessments.

Formal assessments may include diagnostic testing or vocational evaluations. Informal assessments may include the use of work in real situations to assess and develop the capacities of the student to perform adequately in a work environment.

Under the Rehabilitation Act, as amended by WIOA, the VR program can be categorized as a continuum of services, with pre-employment transition services as the first step along that continuum for a student with disabilities who is eligible or potentially eligible (i.e. have not yet applied for VR services). Pre-employment transition services provide an early start to job exploration; and assist the student with disabilities in identifying career interests which may be further explored through additional VR program services, such as transition services and other individualized VR services.

While pre-employment transition services are not meant to be used as assessments to determine eligibility for the VR program, these services provide an early start in career exploration that begin a student's journey and assist in developing a continuum of services. The VR counselor can monitor the student's progress and participation in one or more of the five required pre-employment transition services and use this information for further vocational planning and VR services. For example, the student's participation in early work-based learning experiences may assist in defining a vocational or employment goal and may identify the supports and/or accommodations needed to achieve high quality employment outcomes.

If a student needs more intensive individualized VR services, beyond the scope of pre-employment transition services, they can apply for VR services, and if found eligible, access the full array of VR services available to assist eligible individuals in achieving their employment goals.

[Supplements to the Collaborative Assessment Guide for Transition Planning](#)

Here you can find out more about the [regulations, procedures, and definitions](#) related to assessment for transition age students and youth, as well a [reference](#) list.

[Collaborative Assessment for Families](#) (including an informal questionnaire for families)

[Collaborative Assessment for Students](#) (including several worksheets for students)