

## The Five Steps to Transition Assessment

Karen Akom, Carolyn Cage, Tonya Gokita, Lisa Holland, and Kendel St. John  
Center on Transition Innovations, Virginia Commonwealth University  
April 2023

The transition assessment process is an integral part of transition planning. It consists of gathering relevant information to plan, evaluate, and make decisions regarding students' current and future needs for the successful transition from high school to postsecondary environments.

There are five key steps in this process:

1. Gather existing data
2. Identify assessment needs and assess
3. Analyze data
4. Determine and coordinate transition services
5. Instruct and evaluate

While each step is typically led by a student's case manager, it is important to remember that this process is both student-centered and strength-based. This article will describe each step in greater detail and provide tips for educators and families to use throughout the process.

### Step 1: Gather Existing Data

Before case managers identify appropriate assessment tools or transition services, they should gather existing data about their students. There is a lot of information available about students in their cumulative records. This includes previous transition assessments, standardized tests, observational data, and eligibility assessment results.

Case managers can also speak with the students, family members, and previous case managers (if appropriate) to learn more about what information is already available. The key is to gather information from a variety of sources to develop a clear picture. These sources include students, families, educators, paraprofessionals, school counselors, related service providers, service agency providers, and employers. As existing data is reviewed, case managers should collect any data related to student strengths, preferences, interests, and needs (SPIN) as each component impacts academic and functional performance, careers, and work demands.

**Educator Tip:** Don't forget to include curriculum-based assessments in your data collection, particularly those from CTE courses.

**Family Tip:** Think about student-completed tasks and chores at home. Share this information with the case manager as many household chores and expectations include valuable work readiness skills.

## Step 2: Identify Assessment Needs and Assess

After you review the current assessment data on each student, identify the holes in the data. What additional information do you need to paint a complete picture of the situation? Select assessment tools that answer where the students are currently, where they want to be beyond high school, and how they will get from where they are to where they want to be. To obtain this information, choose assessment tools that help you further identify the students' SPIN related to employment, postsecondary education and training, and independent living. Collecting this information is an ongoing process you will complete throughout the year and well before the IEP team meets to develop or review the students' transition plan.

**Educator Tip:** Use a variety of formal and informal tools to identify the students' SPIN. Assessment tools should address both interests and aptitude and should shine a light on the areas still needed to be addressed to meet post-school goals.

**Family Tip:** Don't hesitate to speak up and suggest areas for assessment. How students function at home and in the community is as important for their future as their school performance.

## Step 3: Analyze Data and Develop Postsecondary Goals

Once you have completed the added assessments, the next step involves analyzing the data. Work with students and their IEP teams to review the data and determine how the results assist the students to know more about themselves and advocate for their desires. The entirety of their transition assessment data will guide the development of postsecondary goals and assist students with developing a vision for their future.

You will use analyzed data to develop all of the postsecondary goals. These postsecondary employment goals drive an effective transition plan. They serve as the foundation upon which postsecondary education and training goals as well as independent living goals are developed. Every career has education and training requirements, and students need to understand the training or education required to reach their career goals.

**Educator Tip:** Include the results of the analyzed transition assessment data in the students' Present Level of Academic Achievement and Functional Performance (PLAAFP) for IEPs. As you collect additional data, update the PLAAFP.

**Family Tip:** Ask for the transition assessment data prior to IEP meetings to have time to review the results and do your own analysis.

## Step 4: Determine and Coordinate Transition Services

After students have identified their postsecondary goals, it is time to consider the services and supports that will give students the best chance for success. This is the action plan that will move students forward and ensure that they have coordinated opportunities to receive appropriate instruction, develop required skills, and experience meaningful activities to meet their goals.

It is important that transition services, supports, and activities are developed collaboratively between all members of IEP teams including schools, students, families, and community agencies or partners. It is also essential that services are designed with the students' strengths and needs in mind. Finally, activities and services should complement one another and contribute to the students' overall progress.

**Educator Tip:** Consider how students will be involved in developing their IEPs and participating in their meetings, establish introductions, and complete referrals to relevant community agencies.

**Family Tip:** Build opportunities in the home to narrow the students' career interests and build upon strengths. Facilitate conversations between students and personal contacts with careers related to students' strengths and interests.

## Step 5: Instruct and Evaluate

To help students reach their postsecondary goals, they must have frequent opportunities to learn and practice the skills they will need to be successful. This process takes time and requires ongoing evaluation to monitor students' progress and ensure that the students' transition plans align with the students' strengths and preferences. As students participate in coordinated activities, their interests and needs could change resulting in the need for new instruction and experiences. This is a natural part of the transition assessment process and serves to lead students closer to achieving their postsecondary goals.

**Educator Tip:** Invite students to reflect on their experiences when reevaluating postsecondary goals.

**Family Tip:** Keep a log or journal of home activities and community experiences. Share your observations with school and community partners frequently.

## Conclusion

These five steps and tips for educators and families define a process that is essential to developing high-quality transition IEPs that will support students' postsecondary goals. In executing this process, it is important for educators to develop increased knowledge and sensitivity to the students' and families' culture, experiences, expectations, and values. The transition assessment process presents an opportunity to build mutual trust and rapport among all stakeholders in addressing the concerns and needs of students and families regarding life beyond high school. It is the pathway to ongoing collaboration that will result in successful transition planning and will facilitate students' achievement of their desired post-school outcomes.

This article was adapted from the [Transition Assessment Process: A Guide for Developing Postsecondary Goals and Transition Services](#).