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### Summary of Performance Portfolio: Supporting Post-secondary Transition for Students with Learning Disabilities

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### **Abstract**

Students with disabilities, including those with learning disabilities (LD) experience difficulties transitioning to post-school environments. A Summary of Performance (SOP) document, provided to students with disabilities during their final year of high school, may serve as a platform for requesting access to services from post-secondary service providers and consequently improve students' success in adult life. However, a SOP portfolio may help special educators effectively bridge services offered in high school and post-secondary settings and ensure smooth transition experiences for students with LD. This article outlines how special educators can use the SOP portfolio as part of comprehensive transition planning to help engage students with LD in the SOP portfolio development process. A brief summary of the literature surrounding the SOP and its use in transition planning is provided. In addition, a scenario is provided to illustrate guidance for SOP portfolio development and implementation. Finally, conclusions are summarized.

*Keywords:* transition, learning disabilities, LD, Summary of Performance, SOP

## **Summary of Performance Portfolio: Supporting Post-secondary Transition for Students with Learning Disabilities**

Students with learning disabilities (LD) have similar post-school goals as students without disabilities (e.g., attend college, obtain competitive employment, and live independently; National Center for Learning Disabilities [NCLD], 2017). However, they experience numerous challenges and barriers in transitioning to post-school environments and their outcomes in the areas of post-secondary education (PSE) remain uncertain. Research suggests that young adults with LD enroll in and complete PSE at lower rates than individuals without disabilities (Hamblet, 2014). Compared to their peers without a disability, young adults with LD pursue PSE at lower rates (65% vs. 83%; Horowitz et al., 2017) with 40.9% of students with LD completing their PSE programs as compared to 52% of students without a disability (Yu et al., 2018). As a result, young adults with LD are affected by the impact limited education has on employment. Data indicate that individuals with LD are twice as likely to be jobless as their peers without disabilities (Horowitz et al., 2017). These outcomes indicate a continued need for strengthening transition planning for students with LD to help improve their post-school experiences.

Research shows student involvement in transition planning is a strong predictor of successful adult outcomes for students with disabilities (Mazzotti et al., 2015; Test et al., 2009), but low numbers of students with LD reported participating in the development of their post-secondary goals (38%; Trainor et al., 2016) and taking a leadership role (25%; Trainor et al., 2016). Hence, many students with LD leave high school without the self-awareness and self-advocacy skills necessary to confidently navigate the new world of independence (Horowitz et al., 2017; Johnson et al., 2018). After graduation, young adults with disabilities may receive post-secondary accommodations if they disclose their disabilities (Newman et al., 2018);

however, the number of students with LD who disclose their disability to their PSE institutions remains low (24%; Horowitz et al., 2017). Although the majority of students with LD (98%) receive accommodations while in high school, research indicates 24% receive accommodations in the post-secondary environment (Newman et al., 2018). These findings support the need for enhanced transition planning for students with LD that incorporate student engagement and active participation.

The Individuals with Disabilities Education Act (IDEA) requires schools to complete a Summary of Performance (SOP) document for students with disabilities exiting high school (IDEA, 2004). With the insight into the student's present level of performance and functional implications of their disability, a well-developed SOP can be used by disability service providers in determining appropriate post-secondary services and accommodations (de Vries & Schmitt, 2012; Keenan et al., 2019). Research shows involving students in development of the SOP provides an opportunity for self-reflection and input, bolsters self-advocacy and self-determination skills, and may increase the likelihood of positive adult outcomes (Martin et al., 2007; Richter & Mazzotti, 2011). The SOP should be regarded as a portfolio that condenses key information necessary to bridge services for students transitioning to PSE and promote their success in the new environment (Keenan et al, 2019, Madaus et al, 2010, Southward & Davis, 2020). The addition of a portfolio with qualitative documentation such as a copy of the student's current Individualized Education Program (IEP), most recent psychoeducational reports, statements from teachers reflecting on the effectiveness of accommodations in the classroom, can be particularly relevant for gaining access to accommodations (Keenan et al., 2019). Thus, the purpose of this article is to show how special educators might engage students with LD in the development of a SOP portfolio that will support student transition into post-secondary settings,

such as post-secondary education. The article begins with an overview of the SOP and continues with a description of each section of the SOP portfolio. A scenario is offered to illustrate guidance for the implementation of the major components of the SOP portfolio.

### **SOP Portfolio**

Federal law requires schools to provide SOPs to all graduating students with disabilities to help facilitate their transition to post-secondary environments (IDEA, 2004). A well-developed SOP portfolio organizes essential information about a student's academic and functional performance and describes supports necessary to achieve their post-secondary goals. Involving students in the development of the SOP portfolio helps to: (a) improve self-determination among students with disabilities; (b) access disability services in post-secondary settings; and (c) provides documentation of disabilities among post-secondary personnel (Richter & Mazzotti, 2011). Development of a SOP portfolio may help bridge services offered in high school and post-school settings to ensure a smooth transition experience for students with LD.

Recommended components of a comprehensive SOP portfolio include: (a) student introductory letter; (b) background information; (c) post-secondary goals; (d) present level of performance; (e) recommendations for post-secondary providers; (e) student reflection; and (f) other documents (i.e. certificates, awards, teacher recommendations, and copies of their IEP and Full and Individual Evaluation [FIE]). Qualitative information and documentation should be added to the portfolio yearly with the finalized SOP included before the student exits high school (Martin et al., 2007). Students can submit the SOP portfolio when initiating contact with the disability service providers at their PSE institution. In order to receive appropriate academic accommodations, it is recommended students submit the portfolio before enrolling in classes. A

short vignette is included to provide context and help illustrate the SOP portfolio implementation process.

*Sally is a high school junior at Lincoln High School who enjoys singing and playing the piano. She also likes to spend her free time painting, writing songs, and volunteering at a local food bank. Sally receives special education services as a student with LD in basic reading and reading comprehension. An IEP has been developed to address Sally's needs in the general education classroom with 30 minutes of daily inclusion support from a co-teacher. At school, Sally enjoys her Orchestra and Art classes. She also plays in a youth band at her church and wants to become a high school orchestra director when she grows up. To achieve her goal, Sally plans to attend King's University, a 4-year college, located close to home and pursue a degree in music education. Mrs. Potts, special education teacher and Sally's case manager, recognizes that Sally needs to practice self-determination and self-advocacy to better prepare for future college life. To ensure positive transition experiences, Mrs. Potts is exploring how to engage Sally in the development of her SOP portfolio to help her exercise self-advocacy skills, learn to make choices, solve problems, evaluate options, set goals, and reach those goals (see Note 1).*

### **Student Introductory Letter**

A student introductory letter serves as the cover page for their SOP portfolio and can be used when contacting a post-secondary service provider. Student active involvement is not only recommended but should be viewed as a critical component of the entire SOP process, including the introductory letter. The student introductory letter should contain the names of both the addressee and the student, as well as the date and a subject matter. The letter would begin with a greeting, followed by a statement of the purpose of the letter and a list of SOP portfolio components. The letter would end with a thank you note and detailed student contact

information. When developing a draft of their introductory letter, students have the opportunity to practice self-advocacy skills essential in receiving necessary post-secondary support and services, reinforce their understanding of the SOP portfolio components, and feel empowered to take charge of their future. It is recommended to limit the student introductory letter to one page.

*Mrs. Potts facilitates Sally's active participation in the SOP process and provides opportunities to practice self-advocacy and important decision-making skills that will benefit Sally while in school and beyond. She encourages Sally to write a sample introductory letter that can be used for contacting future post-secondary providers. After Sally learns about the critical components of a SOP portfolio and finds the name of the contact person for the Disability Service Office at King's University, she composes a draft introductory letter. Mrs. Potts and Sally meet to review, discuss, and revise the letter. A sample of Sally's introductory letter is provided in Figure 1. Mrs. Potts and Sally meet and role-play a conversation between a PSE services provider and Sally, a scenario that might happen during Sally's future visit to King's University.*

<INSERT FIGURE 1 HERE>

### **Background Information**

The background information section of the SOP portfolio should provide the reader a clear picture of the student's background and contexts. The following components should be included and explained: (a) demographic information (e.g., name, date of birth, year of graduation from high school, home language, and contact information); (b) identification of disability (or disabilities if applicable); (c) functional implications due to disability; (d) most recent evaluation (with the date of evaluation and name and credentials of the evaluator); and (e) contact information of the individual helping to complete the SOP (Banerjee & Shaw, 2007).

Most universities require a psycho-educational evaluation with adult normed standard scores to evaluate the functional limitations of the student's disability (Keenan et al., 2019). Therefore, it is important to ensure that previous comprehensive evaluations with reported results of standardized testing are included in the SOP portfolio.

*Mrs. Potts wants Sally to be familiar with the SOP content and participate in gathering the necessary data. To afford Sally to be engaged in the development of this part of her SOP portfolio, Mrs. Potts helps Sally with learning common special education terms and abbreviations and advises Sally to create a handout for her next IEP meeting. She also prompts Sally to complete the demographics section of the SOP and develop a personal graphic organizer that highlights her strengths, needs, interests, and preferences (see Figure 2 for a sample of Sally's graphic organizer; additional forms and supporting videos can be found on [imdetermined.org](http://imdetermined.org)). Building on Sally's artistic skills, Mrs. Potts also encourages Sally to showcase her strengths through pictures, videos, and other artistic representations.*

<INSERT FIGURE 2 HERE>

### **Post-secondary Goals**

The post-secondary goals section is a required SOP component (IDEA, 2004) and serves as the foundation of the direction of the SOP (Dukes et al., 2007). The goals must be not only measurable but applicable to the student's desired post-school outcomes (e.g., education, employment, and/or independent living skills). To ensure that students with LD experience positive adult outcomes, the goals must be based on personal strengths, interests, and preferences as identified through age-appropriate transition assessments (IDEA, 2004). Students taking a leadership role in the development of their post-secondary goals may strengthen their self-determination skills and have a better chance of goal attainment.



*Mrs. Potts wants Sally to be actively involved in the development of her IEP goals to promote her self-advocacy and self-determination skills. To do this, Mrs. Potts provides Sally with instruction and consistent practice throughout the year to develop the skills necessary for making informed choices and setting personal goals. Building on Sally's personal strengths and interests, Mrs. Potts encourages Sally to create a video describing her goals and aspirations for life after school. Some examples of assessments that help Mrs. Potts in developing post-secondary goals include the Transition Assessment Toolkit from the National Technical Assistance Center on Transition, the Transition Assessment & Goal Generator available at the Zarrow Center website, and Whose Future Is It Anyway? curriculum. Figure 3 illustrates Sally's post-secondary goal to provide special educators with an example of well-developed goals and a demonstration of how alignment of transition and IEP goals may help the student with attainment of their post-school goals.*

<INSERT FIGURE 3 HERE>

### **Present Level of Performance**

This section includes observable data that describes the student's functional strengths and limitations (e.g., academic, vocational, or independent skills). The main function of this section is to make a case for necessary accommodations by painting a picture of the student's strengths and needs (Banerjee & Shaw, 2007). It is recommended to include a clear narrative of the student's functional performance in general problem-solving ability, attention, organization, communication, self-advocacy, independent living, social skills, and career or vocational skills.

*Mrs. Potts understands that this component of the SOP is critical to Sally's effective transition to the PSE environment. She invites Sally to help create a list of accommodations and support for each applicable area. She also encourages Sally to reflect on and describe their*

*effectiveness in the classroom. Sally writes a draft of accommodations and assistive technology she considers important to her success in high school (e.g., a daily planner to keep up with assignments, extra time on tests and large projects, access to audiobooks, and a laptop for note-taking). This draft list will be used in the development of the Student Reflection section of the SOP portfolio.*

### **Recommendations for Post-secondary Providers**

This section is based on the student's post-secondary goals and contains suggestions related to needed accommodations, services, and assistive technology to support the student's access to various post-school settings, including PSE. Recommendations for completion of this section include: (a) list only those accommodations and services that were critical to the student's success; (b) make sure recommendations are supported by data related to the student's strengths and needs; and (c) limit references to future success as school personnel do not have specific information about the student's future post-school environment (Newman et al., 2016). Because some of the high school accommodations may not be available in college, it is recommended to reduce the number of accommodations to those most likely to be available in PSE (Hamblet, 2014). Identifying accommodations beneficial to students in PSE will significantly increase their chances of seeking and using post-secondary supports (Horowitz et al., 2017).

*In this part of the SOP portfolio, Mrs. Potts helps Sally understand the difference between the provision of accommodations to students with disabilities in high schools and PSE institutions. She reviews the rights of students with disabilities and continues to involve Sally in the development of her SOP portfolio, which may increase the likelihood of Sally disclosing her disability in college. Together, Mrs. Potts and Sally discuss the implications Sally's disability*

*may have on her performance in school and develop a list of suggested recommendations for post-secondary service providers (see Figure 4 for a sample of Sally's list). These recommendations may serve as a platform for Sally to request post-secondary support and gain access to needed accommodations, which consequently can improve her adult outcomes.*

<INSERT FIGURE 4 HERE>

### **Student Reflection**

This section includes the student's personal reflection on the effect of their disability and their perception on the usefulness of different accommodations. Students are encouraged to describe: (a) how their disability affects their schoolwork and activities; (b) types of accommodations and support that have been helpful for them in high school; (c) types of accommodations and support that worked the best and those that did not work; and (d) what post-secondary service providers need to know about them.

*Since self-disclosure and self-advocacy are critical in receiving accommodations in post-secondary settings, Sally's input becomes an integral part of her SOP. Mrs. Potts offers Sally the opportunity to self-reflect and complete the Student Reflection section independently. She then meets with Sally to review and provide feedback for improvement. Mrs. Potts also advises Sally to sign the SOP to acknowledge her ownership and awareness of its contents. She encourages Sally to take an active role in leading the SOP portfolio discussion during her transition IEP meeting, which further promotes Sally's self-advocacy skills. At the end of the academic year, Mrs. Potts holds a meeting with Sally and her parents to review and discuss the SOP and provide them with a copy of the finalized portfolio. With the SOP portfolio in her hand and multiple opportunities for practicing self-advocacy skills, Sally feels she is well-prepared to transition into the next important chapter of her life - adulthood.*

### **Conclusion**

As evidenced by their alluded post-secondary outcomes, transition planning for students with LD must be strengthened to better facilitate their successful movement from high school to post-school environments. Transition activities must be heavily influenced by the students themselves and include opportunities for practicing skills that would be helpful with pursuing PSE, finding and maintaining employment, and navigating adult life. The SOP portfolio is recognized as a critical transition component for building the bridge to PSE and helping students move toward their post-secondary goals (Madaus et al., 2010; Southward & Davis, 2020). Developing a SOP portfolio will help bridge services offered in high school and post-secondary settings and provide relevant qualitative documentation (Keenan et al., 2019).

As part of the transition process, special educators may use the SOP portfolio to effectively help connect services offered in high school and post-secondary settings to ensure smooth transition experiences for students with LD. This article outlines how special educators can use the SOP portfolio as part of comprehensive transition planning and help engage students with LD in the development of the portfolio. While the SOP portfolio recommendations were identified for students with LD transitioning to PSE, special educators may use them to help students transition to other post-secondary environments such as employment. In this case, the SOP portfolio would emphasize evaluation documentation and necessary accommodations. The described practices designed to support students with LD may also be useful to meet the needs of students receiving special education services under a different disability category. Active student engagement in the SOP development may strengthen self-advocacy and self-determination skills and help students achieve their post-school goals and aspirations.

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#### Note

1. This vignette is a fictional scenario developed from research literature and aggregated authentic school situations. The names in the vignette are pseudonyms.