Transition Planning Process

Transition planning officially begins between the ages of 14 and 16 for most students with an IEP. However, the process is lifelong. (View Transition Education and Services from Birth to Adult document. This section of NTACT’s website provides resources and tools to guide the process of transition planning - encompassing assessment and skill development to plan for success beyond school.

Transition assessment is a critical component of planning with a student for his or her future. However, conducting the assessment is only the first step. Use the data collected to help the student, family, and IEP team plan for the future and identify effective instruction and experiences needed to get there! Assessment to Practice Model (PDF)

Quality transition planning is student centered and student driven. The initial step is gathering information regarding a students’ current strengths, needs, preferences, and interests in the context of “of current and future working, educational, living, and personal and social environments”, (Sitlington, Neubert, and Leconte, 1997). Age Appropriate Transition Assessment Toolkit.

The Summary of Performance is required (IDEA, 2004) and intended to provide a student with a summary of their academic and functional performance to assist the young person in accessing services and resources to achieve their postsecondary goals. An Annotated Bibliography on the Summary of Performance, and a couple of examples of SOP forms (Example 1 and Example 2) provide more information on this important aspect of the transition planning process.

The Taxonomy for Transition Programming 2.0 (Kohler, Gothberg, Fowler, & Coyle, 2016) is strategic framework for secondary transition that incorporates the latest literature regarding predictors of post-school success, strategies to increase graduation and reduce dropout, and effective vocational rehabilitation services focused on fostering successful transition of students and youth with disabilities in college, careers, and their communities. The model continues to include five primary practice categories: Student Focused Planning, Student Development, Interagency Collaboration, Family Engagement, and Program Structure.

Crosswalk of CCR & Taxonomy 2.0: This document depicts the intersection of a college and career readiness framework for students with disabilities (Morningstar, Lombardi, Fowler, & Test, 2015) and the Taxonomy for Transition Programming 2.0. The content may assist educators and other stakeholders as they conceptualize how skills and components critical to successful transition to college and career for students with disabilities fit into transition education and services. This information is useful for state and local educators, state and local vocational rehabilitation staff, families, and other relevant stakeholders to help ensure the transition programming they plan and implement supports students with disabilities to gain the skills they need for postsecondary success.
Predictors of Post-School Success in Taxonomy 2.0: This graphic indicates how the predictors of post-school success for students with disabilities (Test, et al., 2009) are represented within the categories and sub-categories of the Taxonomy for Transition Programming 2.0. The content may increase stakeholders in transition planning as they articulate which effective transition practices and predictors apply to each category of transition education and services. This information is useful for state and local educators, state and local vocational rehabilitation staff, families, and other relevant stakeholders as they identify strategies, tasks, and effective practices while engaging in planning to build program capacity.

The student is the central player in each phase of the process. The IEP team and contributors to the transition assessment process MAY include the student, family, general and special education professional familiar with the student, related service providers (e.g., behavioral interventionist, occupational therapist, physical therapist, speech-language pathologist), other school personnel (e.g., graduation coach, school counselor), community service providers (e.g., community integration specialist, employment specialist, vocational rehabilitation counselor), representatives of postsecondary environments (e.g., disability services coordinator, vocational rehabilitation counselor), or any other individual significant to the seamless transition from the school to post-school environment. All of these individuals may not always be involved in the IEP meeting, but might be included in the process of collecting information in preparation for the IEP meeting to discuss transition. Additionally, while most States do not require that transition be discussed in the IEP meeting until ages 14, 15, or 16 (the federal mandate is age 16), it is permissible for this to be discussed at any age.

Additional transition assessment resources are with the Transition Coalition at the University of Kansas here: Transition Assessment Reviews. Also online modules on aspects of transition planning, including transition assessment can be accessed through the Transition Coalition's Online Modules and Mini Modules. These instructional resources may be useful for middle and secondary educators and other school-based service providers, as well as community service providers such as vocational rehabilitation counselors and family members.

The Individuals with Disabilities Education Act (IDEA, 2004) mandates specific documentation of transition planning and services in the Individual Education Program (IEP) for students with disabilities ages 16 and older. (The mandated age for transition planning and services is younger than 16 in many states and territories.) The U.S. Department of Education’s Office of Special Education Programs (OSEP) collects data from every state education agency regarding compliance with these mandates annually through the States’ Annual Performance Report for Part B – specifically Indicator 13.

Student Case Study Examples & Non-Examples

- High School Student with Autism – Alex
- High School Student with Multiple Disabilities - Lilly
- High School Student with SLD – Allison
- High School Student with SLD - Sean
- High School Student with EBD – Chris
- High School Student with orthopedic impairment – Jamal
- High School Student with ID – Lissette
- Middle School Student with SLD – Tyler
- Middle School Student with ID – Carla
The Summary of Performance is also an important aspect of Transition Planning, intended to “bridge the gap” from school to post-school environments. Summary of Performance Packet (PDF)