TEACHER- AND STUDENT-DEVELOPED SUMMARIES OF PERFORMANCE:

PERCEPTIONS OF TEACHERS AND VOCATIONAL
REHABILITATION COUNSELORS

by

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ABSTRACT

Teacher- and Student-Developed Summaries of Performance: Perceptions of Teachers and Vocational Rehabilitation Counselors

by

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Utah State University, 2015

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Students receiving special education services occasionally experience problems with accessing adult services after graduation. Mandated by the Individuals with Disabilities Education Act reauthorization of 2004, the summary of performance (SOP) is a document that should ideally provide necessary information to adult service providers on needed services and eligibility of a student after graduation. This project examined student-completed portfolios and teacher-completed SOP forms to determine which form was more useful for providing necessary documentation for eligibility. Participants were vocational rehabilitation (VR) counselors and special education teachers who evaluated a student-completed portfolio compared with a teacher-completed SOP form in an online survey. Variables assessed by VR counselors included (a) value of the information provided for determining eligibility, (b) value of the information provided for plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other
professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time required to conduct review, and (i) time required to read/comprehend the document compared to value. Special education teachers evaluated and compared a student-completed portfolio with a teacher-completed SOP form using a similar survey. Variables assessed by special education teachers included (a) value of the information provided for determining postsecondary goals, (b) value of the information provided for transition plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time required to conduct review, and (i) time required to read/comprehend the document compared to value. The results show that a student-completed portfolio was rated more favorably than a teacher-completed form on most variables. VR counselors reported receiving a more complete picture of a student in the student-completed form. Special education teachers rated the student-completed portfolio as higher in value than the teacher-completed SOP. Findings suggest the need for more research on a student-completed portfolio as an SOP.
PUBLIC ABSTRACT

Teacher- and Student-Developed Summaries of Performance: Perceptions of Teachers and Vocational Rehabilitation Counselors

by

Heidi Preece, Master of Science
Utah State University, 2015

Special education students often struggle to access services upon graduation from high school. A summary of performance is a document that should ease this transition, but often is nothing more than a meaningless piece of paper. This study sought to use a student-completed portfolio as a summary of performance.

A student-completed portfolio and a teacher-completed summary of performance document was evaluated by special education teachers and Vocational Rehabilitation counselors. Results indicate the usefulness of a student-completed portfolio for person centered planning.
ACKNOWLEDGMENTS

I would like to thank my committee members, Drs. Robert Morgan, Jared Schultz, and Timothy Riesen for their support and assistance throughout this entire process.

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CONTENTS

Page

ABSTRACT .................................................................................................................. iii

PUBLIC ABSTRACT .................................................................................................. v

ACKNOWLEDGMENTS ............................................................................................... vi

LIST OF TABLES ........................................................................................................ viii

INTRODUCTION ......................................................................................................... 1

LITERATURE REVIEW ............................................................................................... 4

PURPOSE STATEMENT AND RESEARCH QUESTIONS ........................................ 9

METHOD .................................................................................................................... 11

Participants ................................................................................................................ 11
Setting ...................................................................................................................... 12
Dependent Variables ............................................................................................... 12
Experimental Design and Procedures ................................................................... 13
Survey Development ............................................................................................... 14
Data Analysis ........................................................................................................... 15

RESULTS ................................................................................................................... 17

VR Counselor Ratings ............................................................................................ 17
Special Education Ratings .................................................................................... 17
VR Counselor Comments ..................................................................................... 18
Special Education Teacher Comments .............................................................. 19

DISCUSSION ............................................................................................................. 20

REFERENCES ........................................................................................................... 23

APPENDICES ........................................................................................................... 25

Appendix A: Tables .................................................................................................. 26
Appendix B: VR Counselor Comments ................................................................. 31
Appendix C: Special Education Teacher Comments ......................................... 37
Appendix D: Survey .................................................................................................. 41
LIST OF TABLES

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>VR Counselors’ Ratings of Variables</td>
<td>27</td>
</tr>
<tr>
<td>2</td>
<td>Special Education Teachers’ Ratings of Variables</td>
<td>29</td>
</tr>
</tbody>
</table>
INTRODUCTION

The summary of performance (SOP) is a document completed for all transition-aged youth as they exit the public school system, either by aging out or through graduation (Lamb, 2007). The SOP should include recommendations for achieving postsecondary goals, a list of accommodations needed in high school, and a summary of academic achievement and functional performance. The goal of the SOP is to provide evidence of a disability for individual students to adult service providers such as vocational rehabilitation counselors. Several researchers have discussed the implications of the SOP (Izzo & Kochhar-Bryant, 2006; Madaus, Bigaj, Chafouleas & Simonsen, 2006). The rationale behind the SOP was to better facilitate the transition from school to post school. Research has shown that students with disabilities demonstrated dismal outcomes compared to youth without disabilities with regards to employment rate and postsecondary education (Newman et al., 2011). Based on results of a national survey of almost 5,000 students with disabilities and their parents (Newman et al.), only 60% of all youth with disabilities who graduated reported going on to postsecondary education. Of that 60%, only 41% had completed their postsecondary program of study, while 31% left school without completion. At the time of the survey, only 61% of youth with disabilities were employed, holding an average of four jobs in the 8 years since high school. High school-aged students with disabilities are entitled to a well-crafted SOP document to assist adult service providers in working towards postsecondary education and employment placements.

According to the Individuals with Disabilities Education Improvement Act (IDEIA), 2004, the purpose of the SOP is to provide “a summary of the child’s academic
and functional performance which shall include recommendations on how to assist the child in meeting postsecondary goals” (IDEA, 2004, Section 614 [c] 5ii). In order to maximize the opportunity for an SOP to contain the necessary information for postsecondary documentation, representatives from several national organizations met to develop a model SOP template. The Nationally Ratified Summary of Performance (2005) template consists of (a) student background information, (b) postsecondary goals, (c) summary of performance, (d) recommendations to assist in meeting postsecondary goals, and (e) student input. The product has been formally ratified by several organizations (Council for Exceptional Children and the Learning Disabilities Association of America) and was adopted by several states. This template was found to be the most comprehensive compared with example SOP forms provided by the National Secondary Transition Technical Assistance Center (NSTTAC) (DeVries & Schmitt, 2012).

Vocational rehabilitation (VR) counselors can potentially use the SOP document to determine eligibility for services or match student needs to most appropriate services. In order for the SOP to be useful to VR counselors, it must contain test results, and detailed information in areas such as academic functioning, social skills, independent living skills, career and vocational data (including work experience), and self-determination skills (Lamb, 2007). VR counselors can then take the data they receive and create an Individual Plan for Employment (IPE) for eligible students. The IPE is a requirement for every individual receiving VR services, and is developed as a result of a comprehensive discussion with the youth, along with any detailed information provided. The more comprehensive the SOP, the more valuable it is to the counselor. Not only
must the SOP include testing information and accommodations, it must also include information on the personal characteristics and personal preferences of the student. Only by so doing can an SOP contain a full picture of the individual.

Digital portfolios have been shown to aid students in developing their self-determination skills (Black, 2010). Digital portfolios, developed by the student, can allow for necessary documents required by VR to be collected and maintained in an electronic format. Students must be prepared to advocate for themselves; either with an employer, a VR counselor, or a campus disability services office. By participating in the development of a digital portfolio, a student can practice necessary self-determination skills.

Although national experts have weighed in to identify components of an SOP and students have advocated for their needs using digital portfolios, only two studies (DeVries & Schmitt, 2012; Richter & Mazzotti, 2011) have examined views of SOP consumers. Questions remain in terms of SOP characteristics found most informative and user friendly in the process of crafting needed adult services. Research is needed to determine the effectiveness of an electronic portfolio as an SOP.
LITERATURE REVIEW

I searched articles on EBSCOhost, Google Scholar, articles from committee members, and reference sections from relevant articles. Search terms used were *transition, summary of performance and vocational rehabilitation*. I found 21 articles. Ten were eliminated because they were found to contain information regarding how to complete the SOP. From the remaining articles, I selected a literature review on SOP and the two most relevant studies to my topic.

Richter and Mazzotti (2011) reviewed the literature on SOP. They conducted an electronic database search for peer-reviewed articles published since 2004. Articles excluded were monthly newsletters, policy briefs, and articles published prior to 2004. Sixteen articles met the search criteria. Review forms were completed and included the following information: (a) authors and date, (b) target population, (c) postsecondary outcome area, (d) recommendations for developing a SOP, (e) recommendations for using a SOP, and (f) other recommendations. Twelve articles did not identify specific disability categories, but targeted all students with disabilities. Ten articles provided information that related broadly to adult life. Thirteen articles did not include a template or case study examples. All articles made recommendations for SOP development. Richter and Mazzotti concluded that no experimental research currently existed with regards to the effectiveness of the SOP in terms of the evidence it includes to substantiate the presence of a disability in postsecondary settings. The intent was to collect suggestions for future research as identified in the literature, but no information related to this was found in the reviewed articles. One suggestion from Richter and Mazzotti was that investigation was warranted across adult service professionals.
DeVries and Schmitt (2012) conducted a survey of disability service providers (DSP) to examine perceived usefulness of the SOP when making accommodation decisions, and to determine if the usefulness varied as a function of their highest degree earned, discipline or field of study, source of training, and years of employment in postsecondary education. DSPs were recruited through emails sent by the office of the Association on Higher Education and Disability (AHEAD). The participants were required to affirm that they worked directly with students with disabilities in a postsecondary institution in the U.S. A response of “no” exited the responder from the survey, and a response of “yes” granted access to the survey. The response rate cannot be precisely calculated because it is unknown as to how many AHEAD members with email addresses received and read the recruitment email, and how many DSPs did not make the inclusionary criteria. The beginning of the survey contained 10 demographic questions such as the DSPs’ discipline or field of study, highest degree completed, training on disability documentation, years of experience in the field, and characteristics of their institution. DSPs then rated the five sections of the model SOP template regarding the perceived usefulness in making accommodation decisions. The rating system was a five-point rating scale ranging from extremely useful (1) to not useful (5). The study was a quasi-experimental design with four independent variables. The independent variables were: highest degree completed, discipline or field of study, where training was received, and number of years of experience. The dependent variables were the sections of the model SOP: (a) student test scores, (b) rationale for accommodations, (c) history and/or use of accommodations, (d) report writer’s recommendations, and (e) student input. Researchers examined the data to see if DSPs’ perceived usefulness of test scores varied
as a function of the independent variables. Researchers found that DSPs’ perceived usefulness did not vary as a function of any of the independent variables. The results suggested that DSPs found a well-organized and detailed SOP helpful. On average, DSPs rated the sections as at least very helpful. Usefulness did not significantly vary according to the independent variables. Since this study was restricted to postsecondary, the authors suggest the need for researching other adult service agencies.

In 2007, Lamb examined the SOP and its implications for VR counselors. In the informal study, VR counselors considered the national template. Six VR counselors serving transition youth and their district manager examined the national template. These counselors provided services to approximately 400 youth with disabilities in four counties. The counselors had consensus in the following areas: (a) detailed information, especially from a psychologist, would be sufficient to determine eligibility; (b) the model SOP would provide more information than counselors normally possessed; and (c) the SOP would support the counseling relationship and could help develop the Individualized Plan for Employment (IPE). The VR counselors also had recommendations concerning the SOP. They were: (a) disability organizations should inform policymakers about challenges regarding using an SOP in place of a psychosocial evaluation, (b) state directors should collaborate to develop a statewide SOP form to create uniformity, (c) state directors should collaborate to develop common guidelines for documentation, and (d) congress must increase funds to VR. Concerns were raised at the lack of uniformity among SOP forms, and the lack of access to testing information which is critical for accessing services.
One way for students to collect information and contribute to their own SOP is by the creation of a digital portfolio. Black (2010) described digital portfolios for secondary students. Portfolios can teach self-advocacy skills and lead to better preparation for IEP meetings. When creating a portfolio, students should define their purpose. The three purposes for portfolios suggested by the author were: (a) use for job or college interviews; (b) showcase of all skills, or just those related to the IEP; and (c) cumulative collection of personal data, or personal reflection. After determining a purpose, the next step would be to gather information necessary for the portfolio. Black suggested contents for the portfolio, including: current IEP, documentation of eligibility, list of typically used accommodations and assistive technology, work samples, video clips, test scores, student explanation of learning style, and transition plan. These portfolios can provide a means for storing necessary testing information needed by VR and other adult service agencies.

I found no research using an electronic portfolio as an SOP, or on the effectiveness of electronic portfolios for transition. Despite Black’s (2010) recommendations for digital portfolio use with transition aged students and Richter and Mazzotti’s (2011) recommendations for SOP research, research in this area is lacking. A digital portfolio may serve the purpose of an SOP if it maintains the standards described by the National Transition Assessment Summit and the recommendations made by Lamb (2007), but, to date, nothing appears in the published literature. A study determining the value of a digital portfolio serving as an SOP is needed. However, for purposes of my research, I will examine the value, usefulness, comprehensiveness, and time required for
review of teacher-completed SOPs and student-completed SOPs by VR counselors and special education teachers.
PURPOSE STATEMENT AND RESEARCH QUESTIONS

The purpose of the proposed study is to gather impressions from VR counselors and special education teachers regarding teacher-completed SOP forms compared to student-completed portfolio-style SOPs based on rating scale measures. Research questions will include the following:

1. How will VR counselors rate a student-completed portfolio-style SOP compared to a teacher-completed SOP form on a rating scale given variables such as: (a) value of the information provided for determining eligibility, (b) value of the information provided for plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time required to conduct review, and (i) time required to read/comprehend the information in the document compared to value.

2. How will special education teachers rate a student-completed portfolio-style SOP compared to a teacher-completed SOP form on a rating scale given variables such as: (a) value of the information provided for determining postsecondary goals, (b) value of the information provided for transition plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time
required to conduct review, and (i) time required to read/comprehend the
document compared to value.
METHOD

Participants

This study had two groups of participants: (a) VR counselors, and (b) special education teachers.

Vocational Rehabilitation Counselors

I presented the survey instrument to the VR directors in Utah, Oregon, and Idaho and asked that they disseminate the survey to VR counselors in their state who have transition caseloads. I asked that VR directors identify the total number of VR counselors to whom they distribute the survey. VR counselors who indicated they do not have transition caseloads, either total or in part, were removed from the data analysis. The return was 66 respondents. The “snowball” distribution method precluded determination of survey response rate.

The counselors had approximately 1-4 years of experience in the field of VR and an average of 3 years as a counselor focusing on the transition of students from school to adulthood. Of the respondents, 69% reported having a mixed caseload, and 77% reported holding a master’s degree. Of the respondents, 52% did not have a national certification as a certified rehabilitation counselor, while 58% had received 10 or more hours of training in transition, with 69% having never taken a graduate course in transition. Of the respondents, 33% had never seen a SOP from their transition referrals.

Special Education Teachers

I presented the survey instrument to transition special education teachers in two suburban districts and one rural district in Utah. The survey was distributed to 125
teachers and there were 40 respondents. The response rate for the special education teachers was 32%. Overall, 64% of respondents had over 10 years of experience in the field of special education with 43% of respondents working in transition for over ten years. Of the respondents, 57% of the teachers had a master’s degree, 50% of teachers had over 10 hours of training in transition, with 50% never taken a graduate level course in transition.

**Setting**

The setting for the survey was the online environment in Qualtrics®. The setting for development of the student SOP was the student participant’s classroom.

**Dependent Variables**

VR participants were asked to rate variables related to the student-completed portfolio and a teacher-completed SOP using 4-point rating scale. VR participants evaluated the teacher-completed SOP and the student-completed portfolio on the following variables: (a) value of the information provided for determining eligibility, (b) value of the information provided for plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time required to conduct review, and (i) time required to read/comprehend the document compared to value of information obtained. The variables were self-generated and based on a review of the literature.
Special education teacher participants were asked to rate variables related to the student-completed portfolio and a teacher-completed SOP using a 4-point rating scale. Participants evaluated the teacher-completed SOP and the student-completed portfolio on the following variables: (a) value of the information provided for determining postsecondary goals, (b) value of the information provided for transition plan development, (c) value of the information provided for identifying functional limitations, (d) comprehensiveness of information, (e) usefulness for communicating with other professionals, (f) usefulness for communicating with family members, (g) usefulness in creating familiarity with student, (h) time required to conduct review, and (i) time required to read/comprehend the document compared to value. The variables were self-generated and came from a review of the literature.

**Experimental Design and Procedures**

**Selection of Summary of Performances**

I collected three teacher-completed SOP forms from two teachers in one school district. The SOP forms were de-identified. Ten teachers inspected the three SOP forms. Using the nationally ratified standards for SOPs (Richter & Mazzotti, 2011), the teachers evaluated each form as to whether or not it met the criteria. The SOP form that received the highest rating, indicating closest alignment with nationally ratified standards for SOPs, was selected. The same process was repeated with the student-completed portfolios. Three student-completed portfolios included the same information as the teacher-completed SOP but with additional information personalizing the document to the student (i.e., student-completed SOP). Ten teachers inspected the three de-identified
student-completed SOP forms using the nationally ratified standards. One portfolio was selected based on the ratings received. This ensured that both the teacher-and student-completed SOPs met or approximated the national standards.

Survey Development

The research design was a survey (Martella, Nelson, Morgan, & Marchand-Martella, 2013). The survey is contained in Appendix D.

High School Students with Disabilities

The student researcher selected three high school students with disabilities from a pool of nine candidates on the basis of the quality of their portfolios. The participants were enrolled in a transition class and had the classification of specific learning disabilities. Participants had a current IEP. The student researcher obtained permission from parents for developing an electronic portfolio and for allowing the participant’s SOP portfolio to be presented to VR counselors and special education teachers in a research study. Participants created an SOP portfolio during their transition class, with each participant working independently at their own computer.

Survey

The first section of the survey asked VR participants to provide answers to demographic questions: (a) How much transition training have you received? (b) How frequently do you see SOPs from your transition referrals of a school-age student or recent graduate? (c) Is your caseload dedicated to transition? Exclusive to transition? Mixed? (d) How long have you been working with transition caseloads? (e) Number of
years of experience in the field of VR. (f) Number of years of experience in transition. (g) Are you a Certified Rehabilitation Counselor (CRC)? (h) Have you taken graduate courses on transition? If so, how many? (i) What is the highest degree you hold? The demographic questions for the special education teacher survey were as follows: (a) How many years of experience do you have in the field of special education? (b) How long have you been working with transition caseloads? (c) What is the highest degree you have achieved? (d) How much transition training have you received? (e) How many graduate classes have you taken in transition?

The second section of the survey asked participants to review the teacher-completed SOP and the student-completed SOP forms. These forms were uploaded to the second section of the online survey. Participants received the following instructions:

Please review the first SOP. Once you have reviewed the entire SOP, please respond to the rating scale items. Next, review the second SOP. Again, once reviewed, please respond to the rating scale items.

The final question on the survey asked participants to reflect on the comparison of information in these forms. Participants were instructed as follows:

Reflect on the comparison of these forms. What can you tell us about the information you have reviewed in this survey?

**Data Analysis**

The mean rating scale scores and standard deviations for each variable were computed. I typed verbatim the comments received from VR counselors and teachers and examined for common themes. The individual ratings were summed and divided by total
participants to produce mean ratings for each item. Ratings of a student-completed portfolio and a teacher-completed SOP were compared as measured by responses from participants to a 4-point rating scale.
RESULTS

Two questions guided this research: (a) How will VR counselors rate the student-completed portfolio compared to teacher-completed SOP form on a rating scale? (b) How will special education teachers rate the student-completed portfolio compared to the teacher-completed SOP form on a rating scale?

Vocational Rehabilitation Counselor Ratings

The first research question concerns how VR counselors viewed both the teacher-completed SOP form and the student-completed portfolio. Table 1 (see Appendix A) shows the mean ratings, standard deviations, and differences in means for VR counselors’ ratings of the student-completed portfolio and the teacher-completed SOP. Student-completed SOPs were rated slightly lower in value than teacher-completed SOPs on determination of eligibility for VR services. Also, student-completed SOPs were rated as taking more time to review and less efficient in the time required vis-à-vis information gained compared to teacher-completed SOPs. However, on all additional variables, VR counselors rated the student-completed SOP as slightly higher in value than the teacher-completed SOP. Perhaps the most notable difference was Value for Developing an IPE which for student-completed SOPs was rated .41 points higher on a four point scale by VR counselors than teacher-completed SOPs.

Special Education Ratings

To address the second research question, Table 2 (see Appendix A) shows the mean ratings, standard deviations, and differences in means for special education teachers’ ratings of the student-completed and teacher-completed SOPs. Student-
completed SOPs were rated slightly lower in value than teacher-completed SOPs in the area of time required. Student-completed SOPs were rated slightly higher in value than teacher-completed SOPs in the area of Value for Communicating with Other Professionals and Time Required Compared to Value. However, on all additional variables, special education teachers rated the student-completed SOP as significantly higher in value than the teacher-completed SOP, with several areas rated over one full point higher on a four point scale. These areas were Value for Determining Postsecondary Goals, Value for Determining Functional Limitations, Comprehensiveness of Information, Value for Communicating with Family Members, and Value for Creating Familiarity with the Student. In addition, the areas of Value for Creating a Transition Plan was rated .95 points higher on the same four point scale.

**Vocational Rehabilitation Counselor Comments**

Appendix B contains the comments received from VR counselors grouped by theme. The themes that were found were person-centered planning, forms used, and miscellaneous. The majority of the comments related to person centered planning, as evidenced by this comment:

The second form had a lot more of the clients' perceptions of their goals and information about how they feel they are impacted by their disability. The first one was good information but often the most useful information for me is that which I receive from my students firsthand. I appreciated that it appeared more client centered and was more specific.
Special Education Teacher Comments

Appendix C contains the comments received from the special education teachers grouped by theme. The themes found were creating a plan, and postsecondary goals. Overall, special education teachers viewed the student-completed portfolio as more helpful with regards to knowing the student and the postsecondary goals, as evidenced by this comment:

You understand what the student wants to do in the future. The student explains how she will reach her goal. You can see that perhaps the student may need some extra guidance and extra assistance in reaching her goal. You know of some weaknesses and strengths that the student has.

The student-completed portfolio was rated as overall more useful than the teacher-completed form although more time-consuming to review. Special education teachers rated the student-completed portfolio higher in value than the VR counselors, and this may be explained by special education teachers being the creators of SOP forms and the facilitators for students to complete portfolios.
DISCUSSION

The findings of this study show a student-completed portfolio to be useful as an SOP to both VR counselors and special education teachers. On most variables, both VR counselors and special education teachers found the student-completed portfolio more useful than the teacher-completed SOP. The findings of this study showed that a student-completed portfolio was judged useful by VR counselors in developing an IPE. The teacher-completed SOP document was not as useful as a student-completed portfolio.

VR counselors found the student-completed portfolio to be more useful for developing an IPE than a teacher-completed form. VR counselors also found the student-completed portfolio to be more useful than a teacher-completed form in creating familiarity with the student. Special education teachers rated the student-completed portfolio significantly higher in value than the teacher-completed form.

It is interesting to note that 33% of VR counselors reported never having seen a SOP document in their referrals. This calls into question the knowledge of VR counselors regarding SOPs, but more importantly, it draws attention to the fact that many special education teachers are not writing SOPs. Future research should investigate the contents of referrals to VR, and whether SOPs are included.

The results also show that training is minimal with regards to SOP. There needs to be more training done on SOP, for both teachers and VR counselors. The Nationally Ratified SOP template, as discussed on page 2 calls for five areas to be addressed in an SOP. This template needs to be promulgated. Further, the student-completed SOP needs to be promoted, and examples need to be shown to training audiences.
The comments received from participants illustrate that the student-completed SOP has the potential to assist with other learning objectives. The act of creating an SOP can develop empowerment and independence in students. Also, using a student-created SOP assists VR counselors with person centered planning.

These findings add to the research literature on SOP and provide information to give stakeholders direction with regards to using a student-completed portfolio as an SOP. The findings should encourage special educators to use portfolios completed by students as an SOP, and teachers should invest in the value of student-completed SOPs by helping their students get started in gathering and organizing information. Teachers can then take the role of “editor” instead of “creator.” These findings also give VR counselors a more complete picture of a student applying for services. Further, these findings infer that special education teachers can and should introduce VR counselors to the concept of student-completed SOPs.

Future research should explore: (a) the medium of an electronic portfolio in accessing services in both VR and postsecondary education, (b) using a student-completed portfolio with students representing other types of disability, (c) additional types of information that VR counselors perceive would be useful for eligibility determination, (d) special education teachers’ current practices regarding SOP, and (e) family knowledge regarding SOPs.

One limitation of this study is that I used relatively small samples of VR counselors and special education teachers including teachers from only three school districts in one state. The opinions given might not be generalizable to VR counselors or
of teachers as a whole. Future researchers may want to consider accessing a broader sample representing multiple states and systems.
REFERENCES


APPENDICES
Appendix A

Tables
Table 1

VR Counselors’ Ratings of Variables (1=no value, 4=high value) (SC=student completed, TC=teacher-completed)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Student Completed Forms</th>
<th>Teacher-completed Forms</th>
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<td>2.26 1.04</td>
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<td>2.91 .79</td>
<td>2.5 .86</td>
<td>.41</td>
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<td>Value for determining functional limitations</td>
<td>2.46 1.0</td>
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<td>Comparison of time/value of information</td>
<td>2.8</td>
<td>.78</td>
<td>2.82</td>
</tr>
</tbody>
</table>
Table 2

*Special Education Teachers’ Ratings of Variables (1=no value, 4=high value)*

(SC=student-completed, TC=teacher-completed)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Student-completed</th>
<th>Teacher-completed</th>
<th>Difference in Means (SC-TC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">Value for determining postsecondary goals</a></td>
<td>3.42 .74</td>
<td>2.35 .62</td>
<td>1.07</td>
</tr>
<tr>
<td>Value for developing a transition plan</td>
<td>3.42 .74</td>
<td>2.40 .74</td>
<td>1.02</td>
</tr>
<tr>
<td>Value for determining functional limitations</td>
<td>3.33 .93</td>
<td>2.27 .78</td>
<td>1.06</td>
</tr>
<tr>
<td>Comprehensiveness of the information</td>
<td>3.17 .93</td>
<td>2.08 .85</td>
<td>1.09</td>
</tr>
<tr>
<td>Value for communicating with other professionals</td>
<td>3.40 .84</td>
<td>2.70 .79</td>
<td>.70</td>
</tr>
<tr>
<td>Value for communicating with family members</td>
<td>3.30 .91</td>
<td>2.35 .89</td>
<td>.95</td>
</tr>
<tr>
<td>Value for creating familiarity with the student</td>
<td>3.30 .81</td>
<td>2.18 .90</td>
<td>1.12</td>
</tr>
</tbody>
</table>

---

# Value for determining postsecondary goals

Mean: 3.42, SD: .74

Teacher-completed forms: Mean: 2.35, SD: .62

Difference: 1.07

---

# Value for developing a transition plan

Mean: 3.42, SD: .74

Teacher-completed forms: Mean: 2.40, SD: .74

Difference: 1.02

---

# Value for determining functional limitations

Mean: 3.33, SD: .93

Teacher-completed forms: Mean: 2.27, SD: .78

Difference: 1.06

---

# Comprehensiveness of the information

Mean: 3.17, SD: .93

Teacher-completed forms: Mean: 2.08, SD: .85

Difference: 1.09

---

# Value for communicating with other professionals

Mean: 3.40, SD: .84

Teacher-completed forms: Mean: 2.70, SD: .79

Difference: .70

---

# Value for communicating with family members

Mean: 3.30, SD: .91

Teacher-completed forms: Mean: 2.35, SD: .89

Difference: .95

---

# Value for creating familiarity with the student

Mean: 3.30, SD: .81

Teacher-completed forms: Mean: 2.18, SD: .90

Difference: 1.12
<table>
<thead>
<tr>
<th>Time required to conduct review</th>
<th>3.20</th>
<th>.96</th>
<th>3.35</th>
<th>.769</th>
<th>-.15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparison of time/value of information</td>
<td>3.23</td>
<td>.91</td>
<td>2.90</td>
<td>.95</td>
<td>.33</td>
</tr>
</tbody>
</table>
Appendix B

VR Counselor Comments
Comments received from VR counselors grouped by theme.

Person Centered Planning

- I felt that the first form gave me almost no information that I could use in interview with the client, in formulating an IPE. I would need much more time to familiarize myself with goals and functional limitations, using the first as compared to the second. The second form gave me more information, in that I found out more about the student and what she needs to work on if she wants to attain even a portion of her goal. Both forms gave me no information I could use for eligibility, and really shouldn’t.

- The student has an average IQ, which tells me that with the proper supports and accommodations she might be able to achieve her goal or a near one of becoming a nurse. It also tells me that she struggles in both English and Math. She is self sufficient in other areas. But I will need a signed document by a psychologist or a doctor to make her eligible for services. The information is useful as to when the time comes to determine what services we will provide in assisting her in receiving training and empowering her to become independent.

- Some good information of her strengths, entry level goals, some thought about post-secondary goals, and self knowledge of her disability and some accommodations needed to improve her performance. She makes good “I” statements with a desire to be successful. Starting knowledge of personality type and on the AIR self determination scale, she want
more help or a mentor to help her with identifying barriers and how to respond to her barriers.

- The first SOP was useful in determining career goals and possible work habits. The second reflection the students present levels of performance and a brief overview of their other skills and needs. The second form had better information for qualification purposes and the first had better information for determining a career plan.

- The second had more information and was at times repetitive but because I was reading things more than once, it helped me to remember and have a more complete picture of the individual.

- The second form gave more useful information.

- The second form had a lot more of the clients’ perceptions of their goals and information about how they feel they are impacted by their disability. The first one was good information but often the most useful information for me is that which I receive from my students firsthand. I appreciated that it appeared more client centered and was more specific. I use many of the assessments presented in the second example for IPE development because I feel they are important to identify an appropriate job goal and services. It would be nice to receive all of that information up front to make the process go more smoothly.

- The information was relevant to the student and was helpful. As a professional who works with students transitioning this information gave me a good start, however there is information that I would have
liked to obtain within the info that was presented. I would have asked more questions to some of the information specific to accommodations in the classroom setting and how this impacts students in a positive way. By asking more information it would allow me to obtain significant details relevant to eligibility purposes.

- The first form helped me to see what the student’s goals were and what she knew about how to reach those goals. It gave me information about what I could do to assist her in planning and learning about her goals as well as have an idea of some services she may need. The second document was useful in getting information about life skills and a bit of information about accommodations she may need if/when attending school. It did not give as much information about her interests and plans or her understanding of how to achieve them as the first document. Neither one gave a lot of information about her disability, or direct accommodations or functional limitations related to it, they gave some but could have provided more. Also neither had the documentation of her disability VR would need, in addition to this information, to fully determine her eligibility.

- The first form had a lot of good information for becoming familiar with the student and her post-secondary goals for employment and education. The information regarding learning disability was sufficient for determining eligibility and the criteria used for determining the presence of a learning disability was specified. There was a lot of student input
which was helpful. The student input might have been more helpful if a special education teacher or guidance counselor had guided the student through the completion of the form. The form did not have a lot of teacher input and information on functional limitations and those would have made the form more useful. The second form was less helpful than the first. There was very little information on the form. The form itself is of low quality as there is little space for input and should provide better directions as to what information should be provided on the form. The information seemed to come totally from a teacher's or guidance counselor's input. It is not clear why the student is on an IEP or whether the student is even on an IEP. There is little info about accommodations and services for education the student is receiving. I would not feel comfortable using the information provided on the form to make an eligibility determination. There is no information about the student's post secondary goals for employment and education. There is only a little information on the form to become familiar the student. The form itself is of low quality as there is little space for input and should provide better directions as to what information should be provided on the form.

- The second form was a lot better and more complete—it helped me get a better picture of the individual.

Forms
I have never seen a students' SOP. The IEP is usually what I see. Some of them are good most are not helpful. I like the AIR. It has very useful information and insight from the student.

Educators need to provide more information on the summaries of performance. They need to have a common form that covers the basics that we can read through quickly.

SOP provided concise information that required less time to read.

These two examples are very different. I didn't get much information from the second example because it just gave me basic information and not much about how he/she performs academically.

That one form was concise and dedicated to a quick overview of needed interventions. The other was more career oriented and dedicated to discover if career choice matches interests and abilities.

These forms match well together. Getting the perspective of the student and teacher in regards to functional limitations. Illustrates how much the student has insight into their own functional limitations.

The surveys are helpful for starting the VR process. I like the second form better due to the first questions trying to get the individual to start thinking about their skill and ability.

Miscellaneous

The more comprehensive the better!
I didn't like the possible answers ranging from "too long to review -> just enough time to review." I wished there was an option of "not enough to review efficiently."
Appendix C

Special Education Teacher Comments
Comments received from special education teachers grouped by theme

Creating a plan

- The first form was very basic and did not provide any relevant information in creating a proper student driven plan. The second plan was very student driven. I had insight into the students’ skills, likes, strengths, challenges, and future plans without ever meeting the student.

- The first set of information was more inclusive and gave you a better picture of the student’s strengths and needs. The only thing I felt it was lacking was an actual career exploration inventory where the student can identify other areas she may be interested in for a career. The other thing I am concerned about for this student is with her low reading scores, I would be looking for ways to connect her with assistive technology; getting her access to digital books and text-to-speech software that would give her the benefit of having things read aloud, but allowing her the independence of not having a human reader.

- The first form was a very quick read and review with little information. The second form took me more time to go through it but when I was done I felt like I had a lot of knowledge about the student that I could use in an IEP or help set her in the right direction after high school.

- The portfolio methodology was more thorough. I would have liked to have seen more about the disabilities effect at a deeper level academic area (cognitive broad factors ie visual/auditory processing, fluid reasoning, etc. and then the associated abilities). This would help DRC
in higher ed. If this is not available, and relatively current typically the student will have to be tested to get this info. I would also like to see some more functional/vocational assessment info.

- The second set of forms gave more detailed information. The information would help develop a more detailed and focused transition plan.

- The second form was more informative as far as getting to know the student’s likes, dislikes, and what type of person the student is. This is helpful for getting the student to the next level or to transition.

**Postsecondary goals**

- You understand what the student wants to do in the future. The student explains how she will reach her goal. You can see that perhaps the student may need some extra guidance and assistance in reaching her goal. You know of some weaknesses and strengths that the student has.

- That the student has a reading disability but has a good handle on how she learns best and would be able to advocate for herself. She has a clear goal about what she wants to be and what she needs to do to get there.

- That a quick summary of performance filled out by a stressed and time pressed special ed teacher doesn’t give as much information as a comprehensive survey done by the student. Obviously, the more data gathered will give a better picture to those receiving the child at a post-secondary level.
Miscellaneous

- It was good and lots of good samples were used.
- I have learned what the difference is in a highly effective form, vs a not as highly effective form and the details that are involved.
- The second one showed the first was nearly irrelevant.
- This is new to me.
- The first SOP was more comprehensive and of course took longer, but well worth the time for the information that is gathered.
Appendix D

Survey
Survey

Summaries of performance (SOP) are now required by special education law. The SOP should include recommendations for achieving postsecondary goals, a list of accommodations needed in high school, and a summary of academic achievement and functional performance. The goal of the SOP is to provide evidence of a disability for individual students to adult service providers such as vocational rehabilitation counselors.

Section 1-Demographic questions
Please answer the following:

How many years of experience do you have in the field of VR? ______
How long have you been working with transition caseloads? ______
Is your caseload dedicated to transition or do you have a mixed caseload?
Dedicated  Mixed  Don’t Have Transition Caseload
What is the highest degree you have received? Bachelors Masters Doctorate
Do you have a CRC? Yes   No
How much transition training have you received as a professional? 0 hours 1-5 hours 6-10 hours more than 10 hrs
How many graduate classes have you taken in transition? 0 1-2  3-4  5 or more
How frequently do you see summaries of performance from your transition referrals of a school-age student or recent graduate? Never 1-10% 11-25% 26-50% 51-75% 76-100% Don’t know

Section 2-SOP evaluation

Please review the first SOP. Once you have reviewed the entire SOP, please respond to the rating scale items. Next, review the second SOP. Again, once reviewed, please response to the rating scale items.

Student-completed SOP

<table>
<thead>
<tr>
<th>Rating scale item</th>
<th>Explanation</th>
<th>1</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of the information provided for determining eligibility</td>
<td>Is this information adequate for me to determine eligibility of this person?</td>
<td>No value</td>
<td>High value</td>
</tr>
<tr>
<td>Value of the information provided for plan development</td>
<td>Can I develop an IPE for this person based on the information provided?</td>
<td>No value</td>
<td>High value</td>
</tr>
<tr>
<td>Rating scale item</td>
<td>Explanation</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>-------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>Value of the information provided for determining eligibility</td>
<td>Is this information adequate for me to determine eligibility of this person?</td>
<td>No value</td>
<td></td>
</tr>
<tr>
<td>Value of the information provided for plan development</td>
<td>Can I develop an IPE for this person based on the information provided?</td>
<td>No value</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------</td>
<td>----------------------------------------------------------------</td>
<td>----------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Value of the information provided for identifying functional</td>
<td>Can I get a clear picture of how this person is impacted in</td>
<td>No value</td>
<td></td>
</tr>
<tr>
<td>limitations</td>
<td>their daily life?</td>
<td>High value</td>
<td></td>
</tr>
<tr>
<td>Comprehensiveness of information</td>
<td>Is there enough information for me to get a clear picture of all</td>
<td>Not comprehensive</td>
<td></td>
</tr>
<tr>
<td></td>
<td>aspects of life for this person</td>
<td>Comprehensiveness</td>
<td></td>
</tr>
<tr>
<td>Usefulness for communicating with other professionals</td>
<td>Will this information help me communicate with others about this</td>
<td>Not useful</td>
<td></td>
</tr>
<tr>
<td></td>
<td>person?</td>
<td>Highly useful</td>
<td></td>
</tr>
<tr>
<td>Usefulness for communicating with family members</td>
<td>Will this information help me communicate with the family about</td>
<td>Not useful</td>
<td></td>
</tr>
<tr>
<td></td>
<td>this person?</td>
<td>Highly useful</td>
<td></td>
</tr>
<tr>
<td>Usefulness in creating familiarity with student</td>
<td>Do I get the information I need to understand this person?</td>
<td>Not useful</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Highly useful</td>
<td></td>
</tr>
<tr>
<td>Time required to conduct review</td>
<td>Did this information take a long time to review?</td>
<td>Too much time</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Just the right amount of time</td>
<td></td>
</tr>
<tr>
<td>Comparison of time required to value/comprehensiveness</td>
<td>Was it worth the time it took me to conduct the review?</td>
<td>Not efficient</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Highly efficient</td>
<td></td>
</tr>
</tbody>
</table>

Reflect on the comparison of these forms. What can you tell us about the information you have reviewed in this survey?