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Postsecondary Planning Portfolio Rubric

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SRI

Introduction

In the current high-stakes and difficult-to-navigate postsecondary landscape, it is critical that secondary schools support students to engage in a robust postsecondary planning process that will help them make an informed choice about their next step after graduation. Currently, many states are supporting postsecondary planning through the development of individual learning plans (ILPs), which are mandated for all students in 34 states and strongly encouraged in 10 others.[i] SRI Education developed a rubric that can be used to assess the quality of students' postsecondary planning portfolios.

Supporting students through the postsecondary planning process is a pressing need. Almost three quarters of American jobs are projected to require at least some postsecondary education by 2031, yet the percentage of high school graduates who enroll in postsecondary education has declined in recent years,[ii] and youth are increasingly questioning the value of college.[iii] Although many factors likely play into these negative trends, they are in part a reflection of a system where high tuition rates and low completion rates combine to make postsecondary education more of a financial gamble than it has been historically, particularly for families with lower incomes.[iv] There are different pathways to financial security—4-year colleges, 2-year colleges, certificates, apprenticeships, military careers—but none of these are foolproof. Students need support to understand the trade-offs and select a pathway in which they will thrive.

Individual learning plans (also called personal career and academic plans) are student-directed plans developed in collaboration with teachers, counselors, and parents that document students' academic and career interests and are often stored in electronic portfolios.

SRI Education's postsecondary planning rubric can be used to support educators as they work to improve their postsecondary advising systems. The rubric was designed as a formative assessment tool that can be used to diagnose areas of relative strength or weakness in a school's postsecondary planning supports. SRI Education developed this rubric as part of an evaluation of the Engage New England Initiative with funding from the Barr Foundation and input from the initiative's technical assistance provider, Springpoint. Grounded in a literature review and state policy scan, the rubric aligns with Springpoint's Informed Choice Framework and with current leading frameworks in the field of postsecondary advising, such as the Kansas Career Advising Model and the Massachusetts My Career and Academic Plan (see Appendix B for a full reference list).

Postsecondary planning portfolio rubric

The rubric assesses (a) the extent to which a student has made an informed choice about their postsecondary career goal and the pathway they will take to get there and (b) the extent to which they have taken the necessary action steps to prepare for their chosen pathway. This assessment is based on artifacts in the student's postsecondary planning portfolio (see box).

Specifically, the rubric assesses students' postsecondary planning portfolios on four domains:

- **Ground:** Student has identified their personal values, interests, strengths, and fit factors and considered these factors when researching postsecondary options or selecting a postsecondary path.
- **Inform:** Student has researched several careers or fields of interest and explored the potential pathways for reaching at least one career of interest.
- **Select:** Student has identified both a preliminary career goal and their immediate next step after high school graduation and has reflected on how they are aligned to their identity, fit factors, and their research into careers or fields of interest (i.e., the "Ground" and "Inform" stages).
- **Prepare:** Student is prepared to market themselves and has taken the necessary action steps to realize their immediate next step after graduating high school.

To assess the quality of a school's postsecondary planning process, we recommend scoring a representative sample of seniors' postsecondary planning portfolios.

What should a postsecondary planning portfolio include?

Students may have completed their portfolio artifacts at any point during their tenure in high school. Artifacts may include (but are not limited to):

- Identity/values presentation
- Mission statement
- Personal statement/narrative
- Career interest inventory
- Strengths finder results
- Career pathways research report/presentation
- College/postsecondary training research report/presentation
- Postsecondary decision statement
- Senior capstone project/presentation
- Cover letter
- Resume
- First-year budget

Ground

	Level 1 *Extremely limited or no evidence*	Level 2 *Partial evidence*	Level 3 *Sufficient evidence*	Level 4 *Exemplary evidence*
Know yourself	No evidence, or evidence that student has identified *only one* of the following: • A core set of personal values • Top interests, passions, or motivators • Strengths, capabilities, and assets • Learning style	Evidence that student has identified *at least two* of the following: • A core set of personal values • Top interests, passions, or motivators • Strengths, capabilities, and assets • Learning style *BUT* No evidence that student has considered these factors when researching postsecondary options or selecting a postsecondary path.	Evidence that student has identified *at least two* of the following: • A core set of personal values • Top interests, passions, or motivators • Strengths, capabilities, and assets • Learning style *AND* Evidence that student considered at least one of these factors when researching postsecondary options or selecting a postsecondary path.	Evidence that student has identified *at least three* of the following: • A core set of personal values • Top interests, passions, or motivators • Strengths, capabilities, and assets • Learning style *AND* Evidence that student considered at least two of these factors when researching postsecondary options or selecting a postsecondary path. Student does not need to have considered all factors equally.
Know your fit factors	No evidence, or evidence that student has identified *only one* external factor that will optimize their success (fit factor). Fit factors may include (but are not limited to): • Access to a support network or mentors • Access to specialized supports or accommodations, as applicable • Flexibility to accommodate family responsibilities • Location • Housing • Cost • Transportation	Student has identified *at least two* fit factors that will optimize their success. Fit factors may include (but are not limited to): • Access to a support network or mentors • Access to specialized supports or accommodations, as applicable • Flexibility to accommodate family responsibilities • Location • Housing • Cost • Transportation *BUT* No or limited evidence that student has considered these factors when researching postsecondary options or selecting a postsecondary path.	Student has identified *at least two* fit factors that will optimize their success. Fit factors may include (but are not limited to): • Access to a support network or mentors • Access to specialized supports or accommodations, as applicable • Flexibility to accommodate family responsibilities • Location • Housing • Cost • Transportation *AND* Evidence that student considered at least one of these factors when researching postsecondary options or selecting a postsecondary path.	Student has identified *three or more* fit factors that will optimize their success. Fit factors may include (but are not limited to): • Access to a support network or mentors • Access to specialized supports or accommodations, as applicable • Flexibility to accommodate family responsibilities • Location • Housing • Cost • Transportation *AND* Evidence that student considered at least two of these factors when researching postsecondary options or selecting a postsecondary path.

Inform

	Level 1 *Extremely limited or no evidence*	Level 2 *Partial evidence*	Level 3 *Sufficient evidence*	Level 4 *Exemplary evidence*
Explore your options *(In this stage, career options do not need to align with chosen career.)*	No evidence that student has researched any careers or fields of interest.	Evidence that student has partially researched *one or more* career or field of interest, but the research is incomplete (i.e., includes less than four of the Level 4 bullets).	Evidence that student has either: A. **Thoroughly** researched *one* career or field of interest (including at least four of the Level 4 bullets) *AND* completed a work-based learning experience. *OR* B. **Thoroughly** researched *two or more* careers or fields of interest, but not completed a work-based learning experience.	Evidence that student has **thoroughly** researched *two or more* careers or fields of interest, including at least four of the following: • Required educational training (e.g., degrees, certificates, licenses) • Required skills or work experience • Forecasted regional industry trends • Cost of entry and long-term earnings • At least three qualitative career considerations (e.g., benefits, flexibility, culture) *AND* Student has completed a work-based learning experience (e.g., internship, job shadowing, informational interview).
Explore your path	No evidence that student has researched the pathway(s) to a career or field of interest.	Evidence student has either: A. **Partially** researched the pathway(s) to a career or field of interest (select one of A–C in Appendix A). *OR* B. Completed a relevant experiential activity.	Evidence student has either: A. **Partially** researched the pathway(s) to a career or field of interest (select one of A–C in Appendix A) *AND* completed a relevant experiential activity *OR* B. **Thoroughly** researched the pathway(s) to a career or field of interest (select one of A-C in Appendix A) *BUT* has not completed a relevant experiential activity.	Evidence student has **thoroughly** researched the pathway(s) to a career or field of interest *AND* completed a relevant experiential activity (select one of A–C in Appendix A).

Select

	Level 1 *Extremely limited or no evidence*	Level 2 *Partial evidence*	Level 3 *Sufficient evidence*	Level 4 *Exemplary evidence*
Select a preliminary career goal	Student has not identified a preliminary career goal, or they have identified a career goal but have NOT articulated how it is informed by either: A. Their identity (e.g., values, interests, strengths) *OR* B. Their research into careers or fields of interest aligned with the goal.	Student has identified a preliminary career goal and articulated how it is informed by either: A. Their identity (e.g., values, interests, strengths) *OR* B. Their research into careers or fields of interest aligned with the goal.	Student has identified a preliminary career goal and has articulated how it is informed by BOTH their identity (e.g., values, interests, strengths) AND their research into careers or fields of interest aligned with the goal. Student must score 2 or higher on "Know yourself" and "Know your options". *BUT* The explanation is simplistic or lacks clear connections.	Student has identified a preliminary career goal and has articulated how it is informed by BOTH their identity (e.g., values, interests, strengths) AND their research into careers or fields of interest aligned with the goal. Student must score 2 or higher on "Know yourself" and "Know your options". *AND* The explanation is strong and demonstrates clear connections.
Decide on a next step	Student has not identified an immediate next step after graduation, or they have identified a next step but there is no evidence that it connects to their preliminary career goal.	Student has identified an immediate next step that connects to their preliminary career goal, but there is no evidence that their next step is informed by their research into pathways (i.e., *Explore your path*).	Student has identified an immediate next step that connects to their preliminary career goal, and there is some evidence that it was informed by their research into pathways (i.e., *Explore your path*). *BUT* The student has not articulated how the next step was informed by their fit factors.	Student has identified an immediate next step that connects to their preliminary career goal, and there is some evidence that it was informed by their research into pathways (i.e., *Explore your path*). *AND* The student has articulated how the next step was informed by their fit factors.

Prepare

	Level 1 *Extremely limited or no evidence*	Level 2 *Partial evidence*	Level 3 *Sufficient evidence*	Level 4 *Exemplary evidence*
Self-marketing	Portfolio is missing a resume, or the resume is incomplete.	Portfolio includes a completed resume, but it does not meet minimum quality requirements.	Portfolio includes a resume that meets minimum quality requirements.	Portfolio includes a resume that meets minimum quality requirements and one or more of the following: • Personal statement or cover letter • LinkedIn/Indeed profile • Letter(s) of recommendation
Action steps	Student has completed fewer than half of the necessary senior-year action steps.	Student has completed half or more but not all of the necessary senior-year action steps (see A–D in Appendix A).	Student has completed all necessary senior-year action steps but has not created a timeline of action steps that will need to take place over the summer (as applicable; see A–D in Appendix A).	Student has completed all necessary senior-year action steps and has created a timeline of action steps that will need to take place over the summer (as applicable; see A–D in Appendix A).

Appendix A

Additional Scoring Guidance

Explore your path

A. For careers that require an associate degree, bachelor's degree, or higher:

- **Thoroughly:** Researched more than one postsecondary institution or major/program, including at least six of the following:
  - Availability and/or quality of program aligned to desired career
  - Cost
  - Net price
  - Completion rates
  - Location
  - Options for financing (including military options if interested—e.g., National Guard, Army Reserve)
    Note: *If student is planning to join the National Guard/Army Reserve as a way to pay for college, they need to have met requirements for thorough research into military as well.*
  - Demographics
  - Affinity/support groups/summer bridge programs/tutoring/counseling
  - Housing options/housing gaps
  - Application/admission requirements
  - Options for transferring from 2-year to 4-year institution, including transfer requirements, articulation agreements
- **Partially:** Researched at least six of the above for only one institution or at least three of the above for more than one institution.
- **Relevant experiential activities:** College visit or dual enrollment course at college under consideration.

B. For careers that require more than a high school degree but do not require an associate or bachelor's degree:

- Researched pathways to career, including:
  - Certificates (**partially:** at least three; **thoroughly:** at least six)
    - Whether it is industry-recognized
    - Whether it is stackable
    - Cost
    - Net price
    - Financing options
    - Location
    - Time commitment
    - Application/eligibility requirements

        - Apprenticeships (**partially:** at least three; **thoroughly:** all five)
            - Is it a registered apprenticeship?
            - Compensation
            - Location
            - Time commitment
            - Eligibility requirements
    - **Relevant experiential activity:** Work-based learning experience in relevant field.

C. For careers that do not require more than a high school degree:

- **For civilian careers:** (**partially:** at least two; **thoroughly:** all four)
    - Evidence student has researched preferred skills, eligibility requirements, compensation, and benefits.
    - **Relevant experiential activity:** Work-based learning experience in relevant field.
- **For military careers:** (**partially:** at least three; **thoroughly:** all five)
    - Evidence student has researched specific branch, eligibility requirements, compensation, benefits, and commitment.
    - **Relevant experiential activity:** Spoken to a recruiter or completed an informational interview.

Self-marketing

Resume minimum quality criteria: Resume clearly communicates skills, education, and prior work experience with only minor lapses in spelling, grammar, or formatting.

Action steps

A. If student's next step is to go to a 4-year college/university:

a. Submitted applications to reach, safety, and fit institutions
b. Completed ACT or SAT
c. Completed a financial aid application (FAFSA, CSS Profile, or state grant application) (If this is the only missing step, the student can get credit for meeting all.)
d. Sent transcripts
e. Submitted intent to register and paid required deposits by May 1
f. First-year budget
g. (Level 4) Timeline for summer (e.g., submit final transcript, apply for on campus housing [if applicable], sign up/attend orientation, register for classes, complete financial aid entrance counseling, take placement tests [if applicable], arrange transportation to campus for fall semester)

B. If student's next step is to go to a 2-year college:

a. Completed application
b. Completed a financial aid application (FAFSA, CSS Profile, or state grant application) (If this is the only missing step, the student can get credit for meeting all.)
c. Sent transcripts
d. Completed placement exams or has plan to take placement exams over summer
e. First-year budget
f. (Level 4) Summer timeline of final steps (e.g., submit final transcript, sign up/attend orientation, register for classes, complete financial aid entrance counseling, take placement tests [if applicable])

C. If student's next step is to earn a certificate:

a. Completed application
b. Completed FAFSA (If this is the only missing step, the student can get credit for meeting all.)
c. First-year budget

D. If student's next step is to work:

a. **If student's next step is to work in a civilian job:**
    i. Completed applications to potential employers/apprenticeships
    ii. First-year budget
    iii. If working is part of a plan to delay a 4-year degree, evidence student has identified reach, safety, and fit institutions and taken SAT
    iv. If working is part of plan to delay a 2-year degree, evidence student has identified target institution and program and completed a draft application
    v. If plan is to work and join the National Guard or Army Reserve, evidence student has completed the steps below as well
b. **If student's next step is to enlist in the military:**
    i. Contacted a recruiter
    ii. Scheduled day at a Military Entrance Processing Station (MEPS)
    iii. Took Armed Service Vocational Aptitude Battery (ASVAB)
    iv. Completed military application
    v. Completed or has a timeline that includes completing required physical exam
    vi. First-year budget

Appendix B

References and Additional Resources

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Endnotes

[i] (Duffy, 2020).

[ii] (Carnevale et al., 2023; National Center for Education Statistics, 2023)

[iii] (Nguyen et al., 2023)

[iv] (Center on Education and the Workforce, 2022; Lee & Shapiro, 2023; Webber, 2018)

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