

Summary of Performance

Explanation, Technical Assistance, Suggested Form, & Two Examples

What:

One new transition requirement contained in IDEIA 2004 impacts special education students who are finishing their high school / secondary education. Specifically, §300.304 of IDEIA 2004 requires a summary of the child's academic achievement and functional performance, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals. "**Summary of Performance (SOP)**" is the term used to describe this new requirement.

Language from IDEIA 2004:

§300.304 Evaluation procedures.

(B) (e) Evaluations before change in placement.

- (1) Except as provided in paragraph (e)(2) of this section, a public agency must evaluate a child with a disability in accordance with §§300.304 through 300.311 before determining that the child is no longer a child with a disability.
- (2) The evaluation described in paragraph (e) (1) of this section is not required before the termination of a child's eligibility under this part due to graduation from secondary school with a regular diploma, or due to exceeding the age eligibility for FAPE under State law.
- (3) For a child whose eligibility terminates under circumstances described in paragraph (e)(2) of this section, a public agency must provide the child with a summary of the child's academic achievement and functional performance, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

Analysis:

The word "summary" provides a clue to the intent of the new requirement. Special Education professionals accumulate a wealth of information regarding their students, including: life goals, preferences and interests, functional and academic strengths and needs, needed accommodations, strategies for success, etc. In the past, much of this information simply ended up in a dead file, and even when file documents were copied for future service providers, they were not always in a useful and up-to-date format for the next provider. IDEIA 2004 requires that in lieu of an exit evaluation, a summary of performance be prepared during the student's exit year. A well-written Summary of Performance may make the reader feel like they know the student.

The Summary of Performance (SOP) is discussed as part of evaluation procedures. While the SOP is very closely tied to information contained in the IEP, it should be a separate document which condenses and organizes the key information that should follow the student.

When:

The summary document (SOP) is required upon the student's graduation with a regular diploma or age-out from special education services.

However, **as a best practice**, educators could choose to prepare an SOP earlier for students who are: transferring to another school, meeting with the Disability Coordinator at a college, applying for Vocational Rehabilitation Services, or visiting Community Support Provider. Since the intent of the SOP is to provide crucial information to those people who may assist the student in the future, providing that information when it is most timely makes sense. If an SOP is prepared for a student, it is recommended that an electronic copy be saved. If the student's contact information changes, or if there are substantial performance changes prior to graduation or age-out, the appropriate section(s) of the electronic copy can be updated easily.

COMPONENTS OF THE SUMMARY OF PERFORMANCE FORM

1. Student Information (optional):

Contains student contact and demographic information that may be helpful to future service providers.

2. Measurable Postsecondary Goals (optional):

IDEIA 2004 requires that special education students aged 16 and above have measurable postsecondary goals (based upon age-appropriate transition assessments) related to:

- Education OR Training
- Employment
and where appropriate,
- Independent living skills

Under IDEIA 2004, measurable postsecondary goals are required in three and possibly four areas. These goals, which are “the vision statements” for the student, were previously addressed under “Life Planning Outcomes” for Employment and Independent Living. To encourage the consideration of further education for students with disabilities, Congress has mandated that long-term goals in the areas of Postsecondary Training and Education be part of the transition planning process. Measurable postsecondary goals for Independent Living are now included “where appropriate.” Again, the measurable postsecondary goals are to be based on age-appropriate transition assessment.

To make the postsecondary goals more measurable, consider incorporating descriptors like those identified in the Enderle-Severson Transition Rating Scales– Appendix A, 3rd Edition when writing the student’s goals:

Employment – paid (competitive, supported, sheltered), unpaid, non-employment, etc.

Education – 4 year college or university, technical school, 2 year college, military, etc.

Training – specific vocational or career field, independent living skill training, vocational training program, apprenticeship, OJT, military, Job Corps, etc.

Independent living skills – adult living, daily living, independent living, financial, transportation, etc.

3. Summary of Performance (required):

IDEIA 2004 separates the old Present Levels of Performance concept into:

Academic Achievement – This should include reading, math, writing, and other related academic skills. What are the student’s present levels? Include: strengths, needs, necessary accommodations, modifications, assistive technology, etc. Remember that the purpose of the document is to help the next service provider to better understand how to help the student. What do you think is the most relevant information to convey?

Functional Performance – This could include present levels for general ability, problem solving skills, attention, organization, communication, social skills, behaviors, independent living skills, self-advocacy skills, career/vocational skills/experience, and any additional functional information that relates to the student’s measurable postsecondary goals.

4. Recommendations to Assist the Student in Achieving Measurable Postsecondary Goals (required):

This section is similar to the activity/service recommendation page of the Individual Education Program. What steps or activities still need to take place after the student leaves school to help the student to achieve the measurable postsecondary goals? Please include any applicable agency linkages or programs.

5. Student Input (optional): Asking the student about what supports and services have helped them to be successful in high school, and also about what services or supports will be needed in the future, may help the student to understand his/her strengths and needs.

Summary of Performance

Date _____

Part 1: Student Information (optional):

Student Name _____ Date of Birth _____ Gender _____ Race _____

Permanent Address _____

E-mail _____ Permanent Phone # _____ Cell Phone _____

Contact Person/Relationship _____ Contact's Phone Number _____

Disability _____ Manner of Exit _____ Date of Graduation/Exit _____

District/School _____ Staff Person _____ Phone # _____ Date _____

Part 2: Student's Measurable Postsecondary Goals (optional):

Employment: _____

Education: _____

Training: _____

Independent Living (where appropriate): _____

Part 3: Summary of Performance (required): (Based on assessment & tied to the student's postsecondary goals.)

A. ACADEMIC ACHIEVEMENT - For each applicable content area, include a brief Present Level of Performance (grade level, strengths, needs), and then indicate any essential accommodations, modifications, or assistive technology utilized in high school.

Reading -

Math -

Writing -

Learning Styles / Other -

B. FUNCTIONAL PERFORMANCE - For each applicable area, include a brief Present Level of Performance (strengths & needs), and other pertinent information that may help future service providers.

General Ability and Problem Solving -

Attention and Organization -

Communication -

Social Skills and Behavior -

Independent Living Skills -

Self-Advocacy Skills -

Career/Vocational -

Any Additional Functional Performance Areas -

Part 4: Recommendations to Assist the Student in Achieving Measurable Postsecondary Goals (required):

(Please include any applicable linkages to post-secondary agencies!)

Employment:

Recommendations:

Education:

Recommendations:

Training:

Recommendations:

Independent Living (where appropriate):

Recommendations:

Part 5: Student Input (optional):

- A. What supports or accommodations have helped you to succeed in school? (aids, adaptive equipment, other services)**
- B. What supports or accommodations do you feel you will need to continue for you to achieve your postsecondary goals (remember that modified content or tests are typically not offered)?**
- C. If you believe that you will need future services, supports, programs, or accommodations:**

Are you linked with the appropriate post-school supports or programs, or will you need help to get connected with the supports that you may need in the future?

I have reviewed this document with my teacher/case manager and was provided with a copy.

Student Signature _____ Date _____

Summary of Performance Example #1

Part 1: Student Information (optional):

Student Name Gerald Jensen Date of Birth 3/4/2004 Gender M Race White
Permanent Address 20222 Bear Butte Valley Road, Sturgis, SD 57785
E-mail GerJen01@stumidco.net Permanent Phone # (605)347-9999 Cell Phone (605)555-2121
Contact Person/Relationship Jens Jensen/Grandfather Contact's Phone # (605)555-9911
Disability SLD Reading and Writing Manner of Exit HS Diploma Date of Graduation/Exit 5/14/2022
District/School Meade/Brown HS Staff Tom Transition Phone # (605)347-2686 Date: 11/15/2021

Part 2: Student's Postsecondary Goal(s) (optional):

Employment: Gerald will be employed as a Diesel Mechanic.
Education: Gerald will attend Western Dakota Technical College's 2 Year Diesel Program.
Training: Gerald will obtain a Commercial Drivers License to operate 18-wheelers.
Independent Living (Where appropriate): N/A

Part 3: Summary of Performance (required): (Based on prior assessment, tied to Part 2 as much as possible)

A. ACADEMIC ACHIEVEMENT - For each applicable content area, include a brief Present Level of Performance (grade level, strengths, needs), and then indicate any essential accommodations, modifications, or assistive technology utilized in high school.

Reading – Gerald's recent achievement testing showed that he is reading at approximately the 7th grade level. Gerald's comprehension is stronger than his decoding skills. Gerald's test performance in Social Studies and English coursework has improved greatly when tests are read to him and when he has more time to complete the tests. Gerald has used Books on Tape in American Lit and the Kurzweil in American History. He reads slowly, and teachers report that these technologies have helped him to improve speed and comprehension.

Math – Gerald tested at grade level on his most recent achievement battery. He has completed Algebra I and Geometry, earning low B's, without any modifications or accommodations. He tends to do best on computation problems, and he does sometimes struggle with multiple-step story problems.

Writing – Gerald's recent assessments show that he is functioning at about an 8th grade level. His spelling and content are relative strengths, while his mechanics, punctuation, & handwriting are need areas. Gerald has learned to utilize spelling and grammar correction features in Microsoft Word. He enjoys working with computers and has started using the computer for more of his written assignments.

Learning Styles/Other – Gerald seems to learn best when he hears things or is shown examples.

B. FUNCTIONAL PERFORMANCE - For each applicable area, include a brief Present Level of Performance (strengths and needs), & other pertinent information that may help future service providers.

General Ability and Problem Solving – Gerald has a full-scale IQ score in the average range. His Industrial Tech instructors report that he seems to have a “knack” for troubleshooting and fixing things.

Attention and Organization – Gerald has become better at using an assignment notebook. He always turns his work in on time.

Communication – Gerald has started asking for clarification of written instructions. He easily converses with instructors and peers. He listens well in class and retains what he hears.

Social Skills and Behavior – Gerald is well-liked by school staff and peers. He is generally polite and was captain of the Rodeo team.

Independent Living Skills – Gerald drives, prepares his own meals; manages a checking account, payments on his truck, and insurance.

Self-Advocacy Skills – Gerald struggles to admit that he has a reading and writing learning disabilities. Last spring, his welding instructor thought that Gerald was being insubordinate, when the real issue was that Gerald misunderstood some written instructions.

Career/Vocational – Gerald has held various part-time jobs since he was 14. He completed an unpaid internship at the City’s Mechanical shop last spring and worked full-time at an Oil Change shop this past summer.

Any Additional Concerns – Gerald had perfect attendance last semester. He did not qualify for Vocational Rehabilitation.

Part 4: Recommendations to Assist the Student in Meeting Postsecondary Goals (required):

Employment:

1. Gerald should qualify for some financial aid, but the school counselor says he may have to work part-time while attending technical school to make ends meet.
2. Another “mechanic-related” job, while Gerald studies Diesel Mechanics, may be beneficial. Gerald should be careful not to work too many hours while attending technical school.
3. Gerald should talk with the Diesel Instructor at Western Dakota Technical College about part-time job leads for students.

Education:

1. Gerald should meet with the Disability Coordinator at Western Dakota Technical College as soon as possible to request accommodations, assistive technology, and possibly tutoring. E-books, speech to text on his computer, and extra time have been critical to Gerald’s academic success.
2. Gerald should do fine in the “Mechanics” coursework, but he may struggle with some of the core courses. The Psychology and English Composition courses will likely be very challenging. Gerald may want to look into taking some of his core courses during the summer to reduce his course load during the year.
3. Gerald should plan to maintain regular contact, possibly weekly, with the Disability Coordinator and improve his self-advocacy skills on a continuing basis.

Training:

Gerald should continue studying for the CDL written exam and confirm with his uncle that he can use one of his semi trucks for the driving portion of the exam. He may want to take the 5-day CDL prep course this summer.

Independent Living: N/A

Part 5: Student Input (optional):

A. What supports or accommodations have helped you to succeed in school? (aids, adaptive equipment, other services)

Extra time helps. It seems like I am always the last person to finish assignments. Sometimes I get frustrated with tests when I don't understand the questions. Oral tests, speech to text, and the use of a smart pen have all seemed to help. Having tests read to me has made the difference between failing and passing some of my classes. This lets me show what I know instead of showing that I don't read test questions very well – I already know that!

B. What supports or accommodations do you feel you will need to continue for you to achieve your postsecondary goals?

Extra time on writing assignments and having tests read to me are the main ones.

C. If you believe that you will need services, supports, programs, and/or accommodations:

Are you linked with the appropriate post-school supports or program?

Not yet. I have my testing that show I have learning disabilities, but I haven't turned it in to WDT yet.

Will you need help to obtain any needed post-school services, supports, program, and/or accommodation?

Yes, my teacher said that I need to find out who can help me at the Technical College.

Summary of Performance Example #2

Part 1: Student Information (optional):

Student Name Angela Zimmerman Date of Birth 7/6/2000 Gender F Race White
Permanent Address 121 West Main, Westfield, SD 57777
E-mail AtoZ2000@Yahoo.com Permanent Phone Number (605)555-2323 Cell Phone (605)555-2424
Name/Relationship of Contact Person Rex Anderson/Uncle Contact's Phone # (605)444-2222
Disability Cognitive Disability Manner of Exit Age Out Date of Graduation/Exit 7/1/2022
District/School Westfield HS Staff Person Casey Manager Phone # (605)555-2525 Date 12/15/2021

Part 2: Student's Measurable Postsecondary Goals (optional):

Employment: Angela will work part-time as a residential assistant or as a sacker/stocker at a grocery store.

Education: N/A (Angela does not plan to attend a college or technical school)

Training: Angela will receive on the job training as a residential assistant or stocker.

Independent Living: After living with her parents for two more years, Angela will live in an apartment in Westfield with a roommate with supports for money management.

Part 3: Summary of Performance (required): (Based on previous assessment and tied to student's postsecondary goals.)

A. ACADEMIC ACHIEVEMENT - For each applicable content area, include a brief Present Level of Performance (grade level, strengths, needs), and then indicate any essential accommodations, modifications, or assistive technology utilized in high school.

Reading – Angela comprehends well below grade level. Decoding and safety sight words are strengths, but Angela struggles with retaining information from passages of 5 sentences or more. She enjoys researching different breeds of cats and dogs on the Internet.

Math – Angela can add, subtract, multiply, and divide decimal/currency figures using a calculator. Story problems, checkbook balancing, and budgeting have been taught for several years, but continue to be areas of emergent skills.

Writing – Angela enjoys using her computer to write letters and e-mail messages to friends and acquaintances. Filling out forms, including job applications, is a challenge.

Learning Styles/Other – Angela benefits from repeated instructions and demonstrations. She benefits from oral testing.

B. FUNCTIONAL PERFORMANCE - For each applicable area, include a brief Present Level of Performance (strengths & needs), and other pertinent information that may help future service providers.

General Ability and Problem Solving – A Nov 2020 psych evaluation showed a full-scale ability score of 68. New situations are challenging.

Attention and Organization – Angela effectively uses her day planner and accurately tells time to keep track of assignments and medical appointments. Angela has greatly reduced her distractibility and off-task time at her work experience sites.

Communication – A relative strength with supervisors, co-workers, and customers, but Angela sometimes interrupts people.

Social Skills and Behavior – Angela gets along well with adults, but sometimes she is immature with her peers, especially males.

Independent Living Skills – Angela receives SSI. She lives in the basement of her parents' home and does her laundry and cleaning independently. Her mom helps Angela with shopping, cooking, waking up in the morning, and budgeting. Angela completed driver education, but she is afraid to drive on busy roads. She has a dual signature checking account. Angela eats healthy meals.

Self-Advocacy Skills – Angela explains her strengths and accommodation needs, and usually does this in a positive and assertive manner.

Career/Vocational – Angela has participated in several volunteer, program-paid, and employer-paid work experiences. She enjoyed working at the nursing home, the daycare kitchen, and Wal-Mart. She disliked working with the school custodian (she dislikes cleaning) and the animal shelter. Angela has required some limited job coaching and follow-along services to be successful. Angela currently works about 12 hours per week at the nursing home, on their payroll. Her duties include helping with set-up, serving, and clean-up for evening meals. Her employment teacher checks with employer weekly to monitor progress and to deal with any issues.

Additional Functional Performance Areas – Angela is very dependable & takes pride in her work. She accepts constructive criticism. Angela exercises regularly at the YMCA and is in good physical condition.

Part 4: Recommendations to Assist the Student in Achieving Measurable Postsecondary Goals (required):

Employment:

Recommendations:

1. Stay in touch with VR Counselor to obtain help with new or additional employment
2. Meet with supervisor at nursing home to discuss how to get more hours
3. Meet with Benefit Specialist to plan for impact of earnings on SSI benefits

Education:

Recommendations:

1. N/A

Training:

Recommendations:

1. Consider completing Certified Nursing Assistant training at nursing home
2. Complete Customer Service course offered through Community Education program
3. Complete a situational assessment funded by Voc Rehab at Safeway

Independent Living (where appropriate):

Recommendations:

1. Meet with PLANS representative from the Division of Developmental Disabilities
2. Visit LifeScape and sign up for their housing waiting list
3. Attend Independent Living Center's monthly support group for recent high school graduates
4. Continue to improve budgeting skills and pay bills with parental assistance
5. Work on driving skills several times per week to improve skills and confidence

Part 5: Student Input (optional):

A. What supports or accommodations have helped you to succeed in school? (aids, adaptive equipment, other services)

I sometimes need help understanding tests and forms.

B. What supports or accommodations do you feel you will need to continue for you to achieve your postsecondary goals?

Help to get a better job and to keep track of my money.

C. If you believe that you will need services, supports, programs, and/or accommodations:

Are you linked with the appropriate post-school supports or program?

Voc Rehab, SSI, Job Coach

Will you need help to obtain any needed post-school services, supports, program, and/or accommodation?

If I do, my mom can help.