

Summary of Performance Completion Guidelines

Explanation, Technical Assistance, Suggested Form, & Examples

COMPONENTS OF THE SUMMARY OF PERFORMANCE FORM

This form is used to:

- Comply with the new requirement for a “Summary of Performance” in IDEA 2004, Sec. 614(c)(5)(B)(ii).
The Summary of Performance:
 - a. Provides information to students who are graduating with a regular diploma to assist them in meeting their post-secondary goals; and
 - b. Provides information to students who are leaving school because they exceed the age of eligibility for a free appropriate public education (end of school year in which they turn 21) to assist them in meeting their post-secondary goals.
- IDEA 2004 does not explicitly require a Summary of Performance for students who are leaving school before the end of their entitlement period due to graduation with a modified diploma or another diploma or certificate. CDE recommends that school districts provide a Summary of Performance for these students also.

The Law: 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:

Language from IDEIA 2004:

§300.304 Evaluation procedures.

(B) In case of a reevaluation of a child, whether the child continues to have such a disability, and the educational needs of the child;

(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 post high school 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 should 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.

For the first time, IDEIA 2004 also mandates that follow-up contacts be made with special education students one year after graduation, age-out, or dropping out of school. Since the Summary of Performance is one of the last things done with students before they leave Special Education, it should contain the up-to-date post high school goals that will be addressed (measured) during the follow-up contacts.

1. Student Information:

This section contains student contact and demographic information that may be helpful to future service providers. A school contact person is also listed. Complete and up-to-date information is crucial to the follow-up process. When completing the top section of page one, be sure to address every line, print clearly or type and ensure data is current and correct. When indicating primary and secondary disability, please use the following terminology exactly and include the appropriate numerical code with the disability.

Significant Limited Intellectual Capacity	Physical Disability
Emotional Disability	Speech Language
Perceptual/Communication	Deaf-Blind
Hearing Disability	Multiple disabilities
Visual disability	Preschooler with a disability
Infant with a disability	Autism
Traumatic Brain Injury	

2. Measurable Post High School Goals:

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

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

Under IDEIA 2004, measurable post high school 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 post high school training and education be part of the transition planning process. Measurable post high school goals for Independent Living are now included “where appropriate.” Again, the measurable post high school goals are to be based on age-appropriate transition assessment.

To help make the post high school goals 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:

Student's strengths and needs should be written in an objective manner. Assessment language (average, below average, above average, etc...) rather than value words (good, nice, significant, brilliant, slow, etc...) should be used to establish these areas. It is of utmost importance that the actual levels of performance be documented clearly and without an overly positive bias. Eligibility for most adult agency services is dependent upon a need, a deficit, and a disability. This need is the key to attaining the essential services necessary for success in the post-secondary settings indicated on the first page. Over complimentary language can falsely hinder a student's ability to gain access to certain essential services. It is important that present levels of performance are honest, objective, clear, and concise.

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

Academic Achievement & Cognitive Performance –

This should include reading, math, writing, and other related academic skills as well as general ability, problem solving skills, attention, and organization. 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 that 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 Social/Interpersonal/Behavior Skills, Independent Living Skills, Self Care/Personal Hygiene, Environmental Access/ Motor & Mobility Skills, Self-Determination/ Advocacy/Direction, Communication, Career & Vocational, Work Tolerance/Work Skills.

4. Recommendations to Assist the Student in Achieving Measurable Post high school Goals –

This section is unique to the SOP in that it provides specific recommendations to the student, the family, and post high school agencies who may utilize the SOP for information regarding specific and meaningful steps the student, family, and provider might or should do as the student exits public education. This may include specific activities, agency linkages, recommended supports for the student and contact information for further connection with post high school agencies and service providers. It should include what steps or activities still need to take place after the student leaves school to help the student to achieve the measurable post high school goals.

5. Student Input –

Asking the student which supports and services have helped them to be successful in high school, and which services or supports will be needed in the future can be very enlightening.