Summary of Performance Template Completion Guidelines
Explanation, Technical Assistance, Suggested Form, & Examples

COMPONENTS OF THE SUMMARY OF PERFORMANCE FORM
This form is used to:

- Comply with the 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 postsecondary 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 semester in which they turn 21) to assist them in meeting their postsecondary goals.
    c. For students with an active IEP leaving high school for any reason other than the attainment of a regular diploma or through exceeding the age of eligibility, an eligibility review must be completed. Although not explicitly required by IDEA, if the review determines the student will exit, CDE recommends that a Summary of Performance be completed and provided to the student.

The Law: One requirement contained in IDEA 2004 impacts special education students who are finishing their high school / secondary education. Specifically, §300.304 of IDEA.

Language from IDEA 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 eligibility.

(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 <u>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</u>.

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. IDEA 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 [34 CFR 300.305(e)(2)(3)]. 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.

IDEA 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 postsecondary 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.

Intellectual Disability	Physical Disability
Serious Emotional Disability	Speech Language Impairment
Specific Learning Disability	Deaf-Blind
Hearing Disability	Multiple Disabilities
Visual disability	Autism Spectrum Disorder
Traumatic Brain Injury	

2. Measurable Postsecondary Goals:

IDEA 2004 requires that special education students aged 16 and above (ECEA indicates age 15 or no later than the end of 9th grade) have measurable postsecondary goals based upon <u>age-appropriate transition assessments</u> related to:

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

Under IDEA 2004, measurable postsecondary goals are required in two and possibly three areas. These goals, which are "the identified outcomes" 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 postsecondary goals for Independent Living are now included "where appropriate." Again, the measurable postsecondary goals are to be based on <u>age-appropriate transition assessment</u>:

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

- Education/Training - 4-year college or university, technical school, 2-year college,   specific vocational or career 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 functional performance and academic achievement are honest, objective, clear, and concise.

IDEA 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 should 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 and Vocational, Work Tolerance/Work Skills.

4. Recommendations to Assist the Student in Achieving Measurable Postsecondary 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 take as the student exits public education. This may include specific activities, agency linkages, and recommended supports for the student as well as 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 postsecondary 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.