



# Summary of Performance

A Summary of Performance (SOP) is required for each student with an IEP whose eligibility for services under IDEA terminates due to graduation from secondary school with a regular high school diploma or due to exceeding the age of eligibility for free appropriate public education (FAPE) under state law. The school district must provide the student with a summary of the student's academic achievement and functional performance that includes recommendations on how to assist the student in meeting the student's postsecondary goals. The purpose of the SOP is to provide crucial information to people who may assist the student in reaching postsecondary goals in the future.

The Summary of Performance is a compilation of information and data that a school district has collected on a student and summarized into one document. The information and recommendations provided in the SOP can help students and future service providers establish eligibility for reasonable accommodations in their next environment. Students can take the SOP to adult agencies, such as Vocational Rehabilitation or Developmental Disabilities Program, college disability support services, or employers.

The MT Summary of Performance contains four sections:

1. Student Demographics
2. Measurable Postsecondary Goals from the most recent IEP
3. Summary of Student's Academic and Functional Performance
4. Recommendations for Meeting Postsecondary Goals

A keyword is "summary," and the intent is to provide the student and future service providers with an objective overview of the student's strengths, needs, interests, and goals for life after high school. It should include up-to-date information on the student's skills and needs and identify any useful strategies, helpful accommodations, and needed connections to adult agencies that are relevant to helping the student attain their postsecondary goals. Furthermore, it should assist the student and family in understanding their next steps after high school.

## Guide to the Summary of Performance

- The Summary of Performance (SOP) is NOT a part of the IEP; it falls under the section of IDEA 2004 that determines the need for reevaluation prior to exiting special education. IDEA requires a Summary of Performance instead of an exit evaluation when a student's eligibility ends due to graduating with a regular high school diploma or aging out.
- While closely tied to the information contained in the IEP, the SOP must be a stand-alone document that condenses and organizes key information that should follow the student.
- The SOP is an educational record designed for students to voluntarily share with future service providers (e.g., colleges, employers, adult services, and other agencies).
- It's required for students who graduate with a regular high school diploma or age out.
- It's recommended for students who leave high school before reaching the maximum age of eligibility, including those who drop out, to better assist the student in meeting their postsecondary goals. Note that the SOP does not end the student's eligibility for FAPE, and they may still return to continue special education.
- It must contain student demographics and current contact information.
- It must identify the student's measurable postsecondary goals.
- It must include a summary of the student's present levels of academic achievement.

- It must include a summary of the student’s present levels of functional performance.
- Note that it is not necessary to address every prompt in the sections for academic achievement and functional performance; however, it is necessary to consider the unique needs and strengths of the individual student and provide information relevant to the student’s postsecondary goals.
- The SOP must include specific recommendations to the student, the family, and future service providers who may use the SOP for information.
- A well-written SOP can assist future service providers to establish a student’s eligibility for reasonable accommodations and supports in postsecondary settings. However, the SOP must not imply that a student who received services in high school will automatically be eligible for those services after high school.
- To provide the most up-to-date information and the most relevant next steps, **the SOP should be completed upon graduating with a regular diploma or aging out.** However, there are occasions when the student may benefit from receiving the SOP sooner, for instance, if a student is meeting with disability support services or other adult agencies. Since the intent of the SOP is to provide crucial information to those who may assist the student in the future, providing that information when it is most timely makes sense. If needed prior to graduation or aging out, a best practice is to prepare the SOP for the student when needed and then give the student an updated SOP when they graduate with a regular diploma or age out.
- Students should participate in the development of their SOP.

## Developing the MT Summary of Performance

### 1. Student Demographics

This section is auto-populated in AIM. Review this section to ensure the information is accurate for use by future service providers.

### 2. Measurable Postsecondary Goals from the most recent IEP

This section is also auto-populated in AIM. Review this section to confirm that the postsecondary goals indicate the student’s ambitions. In the event a student has revised their postsecondary goals since the last IEP meeting, it is not necessary to amend the IEP to update the postsecondary goals on the SOP. Document the student’s updated postsecondary goals at the top of the summary section to guide the SOP.

### 3. Summary of Student’s Academic Achievement and Functional Performance

Complete this section to include a summary of both the student’s academic and functional present levels of performance in relation to their postsecondary goals.

**ACADEMIC ACHIEVEMENT** includes information on the student’s present levels of performance in reading, math, written language, and other related academic skills to identify where the student is functioning concerning their postsecondary goals. Use assessment language (e.g., average, below average, above average) and not value words (e.g., good, nice, slow, brilliant, significant) to establish these areas. Include the student’s strengths and needs, and indicate any essential accommodations, modifications, assistive technology, etc., used in high school to assist the student in achieving progress. Considering the document’s purpose is to help the next service provider understand how to help the student, what information can the school district provide to assist them?

Informational prompts for this section may include but are not limited to:

READING: Basic reading and decoding, reading comprehension, reading speed

MATH: Calculation skills, math problem solving

WRITTEN LANGUAGE: Written composition, written expression, spelling

LEARNING SKILLS: Class participation, note-taking, keyboarding, organization, homework management, time management, study skills, and test-taking skills.

**FUNCTIONAL PERFORMANCE** includes information on how the student demonstrates skills and behaviors in cognition, communication, motor, social/emotional, and other areas to identify present levels of functional performance and supports needed in relation to their postsecondary goals.

Informational prompts for this section may include but are not limited to:

GENERAL ABILITY & PROBLEM SOLVING: Reasoning and processing.

ATTENTION & EXECUTIVE FUNCTIONING: Energy level, sustained attention, memory, processing speed.

SOCIAL SKILLS AND BEHAVIOR: Interactions with teachers and peers, responsiveness to services and accommodations, involvement in extracurricular activities, confidence, and persistence as a learner.

COMMUNICATION: Speech language, assisted communication.

INDEPENDENT LIVING SKILLS: Self-care, leisure skills, personal safety, transportation, banking, budgeting.

ENVIRONMENTAL ACCESS & MOBILITY: Assistive technology, mobility, transportation needs.

SELF-DETERMINATION & SELF-ADVOCACY SKILLS: Ability to identify and articulate postsecondary goals, ability to ask for help, follow directions, use feedback to improve or correct work performance, initiate work activity, and make decisions independent of others.

CAREER, VOCATIONAL, TRANSITION, & EMPLOYMENT: Career interests, career exploration opportunities, job training opportunities, employment experiences, and any needed support.

#### **4. Recommendations for Meeting Postsecondary Goals**

Complete this section to provide recommendations and a next step plan of tasks or activities to assist the student in meeting their goals in the postsecondary environment.

Education/Training: Write recommendations for accommodations, modifications, and assistive technology needed for the student to be successful in the postsecondary educational setting or vocational training.

Employment: Write recommendations for accommodating the student's disability in the workplace and any modifications or assistive technology necessary for successful employment.

Independent Living (if needed): Write any recommendations for accommodating the student's disability for independent living situations and any modifications or assistive technology essential for the student to succeed in an independent living environment or within the community.

Next Steps: Include recommendations for a student's next steps to attaining postsecondary goals, such as attending a college orientation session, meeting with college disability support services, completing employment applications, contacting job service, and applying for VR Services or housing. Indicate the appropriate agency contact information when possible.

**Student involvement in the Summary of Performance process makes the SOP a more meaningful document as they move to postsecondary environments.**

It is not necessary to conduct an IEP meeting to develop the SOP; however, a best practice is to complete the SOP with the student to ensure they understand the purpose of the document and how to use it. Involving students in developing the SOP can foster greater self-determination about their disabilities and postsecondary goals.

To make the SOP more meaningful, ensure the student understands the recommendations and the next steps they will take to make each goal happen. Asking students to articulate what supports and services have helped them succeed in high school and to consider what services or supports they may need in the future can help students better understand their strengths and needs, develop skills for self-advocacy, and become more confident to address the challenges of navigating their new postsecondary settings.

Example questions to guide discussion and student participation:

1. How does your disability affect your schoolwork and school activities, such as grades, relationships, assignments, projects, communication, test time, mobility, and extracurricular activities?
2. Which supports are helpful at school, work, or within the community? What aids, adaptive equipment, physical accommodations, or other services do you use?
3. What supports or accommodations would you like to continue to help you to achieve your postsecondary goals?
4. What factors don't work for you at school, work, or within the community? Do you avoid any environments or settings (e.g., loud rooms, steep stairs, crowded seating, flickering lights, or certain smells)?
5. What adult agencies or providers are you already linked with (e.g., Vocational Rehabilitation, College Disability Services, Community Support Provider, etc.)?
6. Will you need help connecting with any identified post-school services, agencies, supports, or accommodations?

Example Summary of Performance

### **Student Demographics**

Student Name: Cheyenne (information auto-populates in AIM)

### **Measurable Postsecondary Goals from most recent IEP:**

Education/Training: After high school, Cheyenne will participate in on-the-job training at a restaurant.

Employment: After high school, Cheyenne will work part-time as a server in a restaurant.

Independent Living: After high school, Cheyenne will use public transportation to travel to and from work, recreation, and social activities.

## **Summary of Student's Academic and Functional Performance**

**Reading:** One of Cheyenne's strengths is reading. On the Woodcock-Johnson, she scored 88 in reading, placing her in the low average range when compared to her peers. Cheyenne may need help with comprehension when reading longer documents; discussion after she reads is beneficial.

**Math:** On the MAPS test, Cheyenne scored 204 in math. The average score of her peers is 228, placing her skills below average. Cheyenne has increased her functional math skills. When given a purchase price and amount paid up to \$100, she uses a calculator, and she can count back change with accuracy. Cheyenne needs assistance to count larger sums of money. She can read and understand checks.

**Written Language:** Cheyenne's handwriting is neat and legible. On the Woodcock-Johnson, she scored an 81 in written expression, placing her in the low average range when compared to her peers. Using a computer with grammar and spellcheck, she can draft and send emails with little to no errors. She performs best when writing in a quiet environment with no distractions.

**Learning Skills:** Cheyenne participates in class, and she gets along well with others. She learns best by watching someone demonstrate a skill. Cheyenne took a keyboarding class, and she can type 23 words per minute with accuracy. She can navigate Google Suite, and she learns routine procedures on the computer quickly. She takes her tests in an alternate setting to minimize distractions.

**General Ability and Problem Solving:** Cheyenne has a full-scale IQ score in the average range. New situations are challenging to her, and she needs time to adjust and prepare for change.

**Independent Living:** Cheyenne can prepare meals and shop for some groceries. She is learning to manage her own money, and she has a bank account. She still requires some support and guidance with her budgeting, shopping, and money management. Cheyenne does not have her driver's license, but she has learned to independently navigate public transit. She tends to call ahead to arrive at her destinations early. She is mindful to call and report that the bus is late. She does best when she is given a paper copy of the schedule or an appointment card so that she can take her time when entering the information into her calendar. She keeps the hard copy to periodically verify the information. The use of technology with a work schedule/task schedule app on her cell phone will be helpful for her independence on the job. She said she is thinking about getting her own apartment next year.

**Self-Determination/Self-Advocacy Skills:** Cheyenne is quick to get on task and complete routine activities. She can follow directions, but she does not always stop to ask for help when she needs it. She gets nervous in new environments, and she benefits from checking in with someone to confirm she is correct or provide guidance as needed.

**Employment:** Cheyenne completed a 4-month job shadow and work experience at Dairy Queen. In that work setting, she greeted customers, served food, and cleaned tables. With guided assistance, she was learning to enter customer orders into the Point-of-Sale (POS) system, and she was able to ring up orders and provide change. She did not gain experience running debit or credit cards. Cheyenne has not practiced how to search for job openings, but she can complete a job application. She applied and was determined eligible for Vocational Rehabilitation services.

**Social Skills and Behavior:** Cheyenne is well-liked by school staff and peers. She is generally polite, and she makes conversation. This year, she was a member of Key Club. She attended a conference, helped sell concessions, and went door-to-door with peers collecting canned goods for the food drive.

## **Recommendations for Meeting Postsecondary Goals**

**Training:** Cheyenne learns best by observing, and she learns quickly when given the opportunity to job shadow. A support person or a job coach would be helpful to model tasks and procedures and check in with her as she is learning.

**Employment:** Cheyenne needs step-by-step written instructions or a task list. When appropriate, the use of technology with a work schedule/task schedule app on her cell phone could be helpful for her independence on the job. She should be given specific information on who to contact in the event of illness or other unforeseen events. She requires a standard calculator or the calculator on her cell phone to complete math equations.

**Independent Living Skills:** Cheyenne continues to require support and guidance with budgeting, shopping, and money management. She will need assistance to learn about housing options in the future.

### **Next Steps:**

1. Meet with your VR Counselor to obtain assistance with new employment and on-the-job training.
2. Continue to improve budgeting skills and pay bills with parental assistance.
3. Complete the free course on Personal Finance through Khan Academy.
4. To learn more about subsidized housing and the application process, visit the Public Housing Authority.