


SUMMARY OF PERFORMANCE (SOP)

Guidance for Developing the SOP

Purpose

The Summary of Performance (SOP) is required under the reauthorization of the Individuals with Disabilities Education Act of 2004. The language as stated in IDEA 2004 regarding the SOP is as follows

 For a child whose eligibility under special education terminates due to graduation with a regular diploma, or due to exceeding the age of eligibility, the local education agency “shall 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” §Sec. 300.305(e)(3).

The Summary of Performance, with the accompanying documentation, is important to assist the student in the transition from high school to higher education, training and/or employment. This information is necessary under Section 504 of the Rehabilitation Act and the Americans with Disabilities Act to help establish a student’s eligibility for reasonable accommodations and supports in *postsecondary* settings. It is also useful for the Vocational Rehabilitation Comprehensive Assessment process. The information about students’ current level of functioning is intended to help postsecondary institutions consider accommodations for access. *These recommendations should not imply that any individual who qualified for special education in high school will automatically qualify for services in the postsecondary education or the employment setting. Postsecondary settings will continue to make eligibility decisions on a case-by-case basis.*

The SOP is most useful when **linked with the IEP process** and the student has the opportunity to actively participate in the development of this document. During the high school years the student will work on ways to address gaps between skill levels and the chosen career path or specific job. Many of these gaps will be addressed through instruction, work experiences, and accommodations. **The SOP needs to articulate the degree to which these gaps still exist for the student upon exiting from high school and the accommodations that narrow or close the gaps.**

The SOP **must** be completed during the final year of a student’s high school education. However, the SOP may be part of a portfolio process that begins at age 14 or before. The timing of completion of the SOP may vary depending on the student’s postsecondary goals. If a student is transitioning to higher education, the SOP, with additional documentation, may be necessary as the student applies to a college or university. Likewise, this information may be necessary as a student applies for services from state agencies such as vocational rehabilitation. In some instances, it may be most appropriate to wait until the spring of a student’s final year to provide an agency or employer the most updated information on the performance of the student.

 = legal requirement to be included in the SOP

Part 1: Student Information


This section contains student contact and demographic information that will be helpful to future service providers and to post-school surveyors who will contact students after graduation. A school contact person is also listed. Complete and up-to-date information is crucial to the follow-up process.

The completion of the Summary of Performance may require the input from a number of school personnel including the special education teacher, regular education teacher, school psychologist or related services personnel.

Part 2: Student's Measurable Postsecondary Goals and Recommendations to Assist the Student in Meeting his/her Postsecondary Goals:


Students aged 14 and above (or younger, when deemed appropriate by the IEP team) have measurable postsecondary goals (based upon age appropriate transition assessments) related to education or training, employment, and where appropriate, independent living skills.

These goals are the desired postsecondary outcomes of the student. This section should be completed using information from the student's recent transition IEP as well as updated information provided by the student. The information may be filled out independently by the student or completed with the student through an interview.

 **Recommendations to assist the student in meeting postsecondary goals** – This section should present suggestions for accommodations, adaptive devices, assistive services, compensatory strategies, and/or collateral support services, to enhance access in a post-high school environment, including higher education, training, employment, independent living and/or community participation. The recommendations can relate to the student's educational goals, community participation, employment, and/or independent living. Words of caution when filling out this section, employers and colleges have different expectations and obligations. Do not recommend things in the SOP that colleges and employers aren't required to provide. Post-secondary providers will continue to make eligibility decisions on a case by case basis and the recommendations do not imply that the service a student qualified for in high school would automatically be the rule in post-secondary services.

Part 3: Academic Achievement and Functional Performance

The Present Level of Academic Achievement and Functional Performance section of the IEP offers a chance to integrate data to provide a current picture of the student's strengths and needs. This section includes academic and functional levels of performance. Next to each specified area, please complete the student's present level of performance, for example, grade level, standard scores, strengths and needs, and the accommodations, modifications and assistive technology that were **essential** in high school to assist the student in achieving progress and why they are needed. Please leave blank any section that is not applicable.

 **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. Multiple sources of assessment data must be considered to develop a complete picture of a student's academic ability, such as CBM, district or state assessments, teacher made assessments or standardized assessments. For a student with significant needs, this information should reflect his or her

performance on functional academic tasks, which may include recognition of safety signs for reading, next-dollar strategy for math, and production of a signature for written language. **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? How does the student's disability affect his/her performance in academic activities?**



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. **How does the student's disability affect their performance in daily activities?**

The functional area of **social skills and behavior** should include data-based statements about the student's adaptive and problematic behaviors, including information from standardized tests, and data based on direct observations of the student. Scores on any formal social skills curriculum the student participated in.

The area of **independent living skills** includes self-care, leisure skills, personal safety, transportation, banking, and budgeting. Information for this area will come from evaluation data or anecdotal information provided by the student, and by service providers who have supported the student if life skills instruction or supervised the student in living experiences.

The area of **environmental access/mobility** addresses students with physical challenges. Information could come from recent assistive technology assessments in school and at work, anecdotal data from observations, feedback from employer, etc. Develop a statement highlighting the ideal physical access environment for living, school, and work.

The area of **self-determination and self-advocacy** is a key component for successful transition. This is the ability to identify and articulate postsecondary goals, learning strengths and needs; independence and ability to ask for assistance with meeting needs. Data can be collected through formal assessments and/or demonstration of skills through student led IEPs and student presentation of information to employers, etc.

In the area of **career/vocational/transition/employment** it may be helpful to begin with a brief summary of information about the student's career interests, work values, and temperaments that can be gleaned by reviewing results from career and transition assessments. Include career development milestones, such as career exploration, work history, job shadowing, or internships, etc.; courses that targeted the development of career and vocational skills. How do the student's experiences, skills and assessment results relate to the post-school outcomes?

Part 4: OPTIONAL

A description of the student's disability and the assessments used to diagnose the disability will be helpful to the next provider and may eliminate the need for additional assessments to confirm the diagnoses for eligibility determination for services.

Information about the student's experiences in school, the community and work will be helpful to determine the student's capabilities, skills and needs.

Criteria for Content in the Summary of Performance

1. Information facilitates the transfer of critical information that leads to effective and successful participation in all postsecondary settings/domains: work, education, community, and home.
2. Information incorporates achievements and up-to-date academic, personal, career, and employment levels of performance.
3. Student goals are included and are provided as much as possible in the student's own language or terms (so that he or she will recognize and remember) and are based on current or recent assessment findings.
4. Information is based on direct, firsthand input from the student and other transition team members and stakeholders: teachers, parents, siblings, adult service providers, etc.
5. Data and information, including disabilities, are written in functional terms rather than school system jargon.
6. Accommodations are presented in functional terms, preferably in the student's own language
7. Content includes information specifically requested by (or which typically is required or used by) the student, adult service providers, postsecondary education and training personnel.
8. Information is written and/or presented (in some cases, it could include photographs or illustrations) in ways that are easily understood and are immediately useful for students, adult service providers, postsecondary education personnel, and/or employers.
9. Artifacts, documentation, and other items that are attached are identified within the SOP content, preferably in a highly visible space.
10. Signatures by the student and other team members verify that the contents have been explained and agreed upon.
11. Information presents an accurate depiction of the student, even if additional space is needed—the form should fit the student, not the other way around.

(Leconte, P.J. (2006). The evolution of career, vocational, and transition assessment: Implications for the Summary of Performance. *Career Development for Exceptional Individuals*. Vol. 29, Number 2, Fall 2006, pp. 114-124.)

My Summary of Performance

Name: _____ Date of Birth: _____

Address: _____
(Street) (Town, state) (Zip code)

Telephone Number: _____ Year of Graduation/Exit: _____

Current School: _____ City: _____

Primary Language or mode of communication: _____

School Representative Contact: Name: _____ Title: _____

School: _____ E-mail: _____ Telephone Number: _____

My Goals for one year after high school:

Learning	Goal:
	Recommendations to assist me in meeting my goal:
Working	Goal:
	Recommendations to assist me in meeting my goal:
Living	Goal:
	Recommendations to assist me in meeting my goal:

My performance in academic content areas:

Academic Content Area	Present Level of Performance (grade level, standard scores, strengths, needs)	Essential accommodations, assistive technology, or modifications utilized in high school, and why needed.
Reading (Basic reading/decoding; reading comprehension; reading speed)		
Math (Calculation skills, algebraic problem solving; quantitative reasoning)		
Language (written expression, speaking, spelling)		
Learning Skills (class participation, note taking, keyboarding, organization, homework management, time management, study skills, test-taking skills)		
Other Academic Areas (Science, social studies, etc.)		

My performance in functional areas:

Functional Areas	Present Level of Performance (grade level, standard scores, strengths, needs)	Essential accommodations, assistive technology, or modifications utilized in high school, and why needed.
Social Skills and Behavior (Interactions with teachers/peers, level of initiation in asking for assistance, responsiveness to services and accommodations, degree of involvement in extracurricular activities, confidence and persistence as a learner,)		

Independent Living Skills (Self-care, leisure skills, personal safety, transportation, banking, budgeting)		
Environmental Access/Mobility (assistive technology, mobility, transportation)		
Self-Determination/Self-Advocacy Skills (Ability to identify and articulate postsecondary goals, learning strengths and needs;		
Career-Vocational/Transition/Employment (Career interests, career exploration, job training, employment experiences and supports)		
Additional important considerations that can assist in making decisions about disability determination and needed accommodations (e.g., medical problems, family concerns, sleep disturbance)		

Date this Summary was completed: _____

Team participants providing input into the Summary of Performance

Name	Title	Name	Title
	Student		Parent(s)
	Teacher		Teacher
	Other Service Provider		Other Service Provider

OPTIONAL

Documentation of special needs:

The most recent copy of assessment reports that diagnose and clearly identify my special needs and/or that will assist in postsecondary planning are identified and attached.

Type of Documentation	Assessment Name	Dates Administered
Psychological/Cognitive		
Neuropsychological		
Medical/Physical		
Communication		
Adaptive Behavior		
Social/Interpersonal		
Communication/Speech/ Language		
Multi-Tiered System of Supports (MTSS/RTI)		
Career/Vocational/ Transition		
Community-based assessments		
Self-determination assessments		
Assistive technology		
Classroom observations		
Other		

Additional information about my strengths, interests, preferences, or needs to support a successful transition to postsecondary services (e.g.: work experiences, on-the-job experiences, school experiences such as extra-curricular activities, community experiences, etc).

(Modified from a template developed by the National Transition Documentation Summit (2005). Retrieved on June 27, 2008 from <http://www.unr.edu/educ/ceds/sop.template.pdf> ; and the Oklahoma State Department of Education (OSDE Form 15)).