

School-Based Occupational Therapist Summary Rating Form (Required)

This form is to be jointly reviewed by the occupational therapist and evaluator during the Summary Evaluation Conference conducted at the end of the year.

Name: _____
 School: _____ School Year: _____
 Evaluator: _____ District: _____
 Date Completed: _____ Evaluator's Title: _____

Standard 1 School-based occupational therapists demonstrate leadership, advocacy, and collaborative and ethical practice.		Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Element a. Leadership						
Element b. Teamwork						
Element c. Vision						
Element d. Ethics						
Element e. Advocacy						
Element f. Supervision and Oversight						
Overall Rating for Standard 1						
Comments: Recommended actions for improvement: Resources needed to complete these actions:	Evidence or documentation to support ratings: <ul style="list-style-type: none"> <input type="checkbox"/> Communications/observations of mentoring/supervisory activities <input type="checkbox"/> Reports of formal and informal peer review <input type="checkbox"/> Documentation of professional development/continuing competence activities <input type="checkbox"/> Documentation of services provided (evaluations, IEP development, intervention plans, data sheets, contact notes, progress monitoring) <input type="checkbox"/> Documentation of service on committees, work groups and special projects <input type="checkbox"/> Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) <input type="checkbox"/> Minutes, attendance logs and agendas from meetings <input type="checkbox"/> Documentation of trainings, in-services and workshop presentations; and related materials (agendas, handouts, feedback) <input type="checkbox"/> Documentation of program review and planned/implemented development activities <input type="checkbox"/> Documentation of use of professional, student, program, and school wide data in making service/intervention decisions <input type="checkbox"/> Documentation of professional certifications/ memberships / specialty certifications <input type="checkbox"/> Documentation of self-improvement plan, continuing competence activities and/or grants, aligned with professional, district/school and department's vision/mission and goals/improvement plans. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>					

Standard 2: School-based occupational therapists promote a respectful environment for diverse populations.		Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Element a. Communication						
Element b. Least Restrictive Environment						
Element c. Diversity						
Overall Rating for Standard 2						
<p>Comments:</p> <p>Recommended actions for improvement:</p> <p>Resources needed to complete these actions:</p>	<p>Evidence or documentation to support rating</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communications/observations of mentoring/supervisory activities <input type="checkbox"/> Reports of formal and informal peer review <input type="checkbox"/> Documentation of professional development/continuing competence <input type="checkbox"/> Documentation of services provided (evaluations, IEP development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.) <input type="checkbox"/> Documentation of service on committees, work groups and special projects <input type="checkbox"/> Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) <input type="checkbox"/> Minutes, attendance logs and agendas from meetings <input type="checkbox"/> Documentation of trainings, in-services and workshop presentations; and related materials (agendas, handouts, feedback) <input type="checkbox"/> Documentation of program review and planned/implemented development activities <input type="checkbox"/> Documentation of use of professional, student, program, and school wide data in making service/intervention decisions <input type="checkbox"/> Documentation of professional certifications/memberships/specialty certifications <input type="checkbox"/> Documentation of professional development/continuing competence activities on diversity, cultural attitudes and awareness <input type="checkbox"/> Service on committees, work groups and special projects to support diversity, cultural awareness and range of student environments <input type="checkbox"/> Student profiles documented in written reports <input type="checkbox"/> Documentation of collaboration/cooperation with ESL teachers <input type="checkbox"/> Documentation of activity planning/implementation to incorporate cultural awareness 					

Standard 3: School-based occupational therapists apply the skills and knowledge of their profession within educational settings..		Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Element a. Program Administration and Management						
Element b. Policies and Laws						
Element c. Work Behaviors.						
Overall Rating for Standard 3						
<p>Comments:</p> <p>Recommended actions for improvement:</p> <p>Resources needed to complete these actions:</p>	<p>Evidence or documentation to support rating:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communications/observations of mentoring/supervisory activities <input type="checkbox"/> Reports of formal and informal peer review <input type="checkbox"/> Documentation of professional development/continuing competence activities <input type="checkbox"/> Documentation of services provided (evaluations, IEP development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.) <input type="checkbox"/> Documentation of service on committees, work groups and special projects <input type="checkbox"/> Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) <input type="checkbox"/> Minutes, attendance logs and agendas from meetings <input type="checkbox"/> Documentation of trainings, in-services and workshop presentations; and related materials (agendas, handouts, feedback) <input type="checkbox"/> Documentation of program review and planned/implemented development activities <input type="checkbox"/> Documentation of use of professional, student, program, and school wide data in making service/intervention decisions <input type="checkbox"/> Documentation of professional certifications/ memberships/ specialty certifications <input type="checkbox"/> Documentation of data collection, interventions and outcomes to guide student/program services <input type="checkbox"/> Service on committees and work groups for program and policy changes <input type="checkbox"/> Documentation of program administration and management activities (referral logs, caseloads, student files, calendars, schedules, year-end reports, equipment inventory) <input type="checkbox"/> Use of local, state and national standards and best practice guidelines in student services and documentation <input type="checkbox"/> Documentation of special awards, recognitions, letters <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 					

Standard 4: School-based occupational therapists apply the skills and knowledge of their profession within educational settings.		Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Element a. North Carolina Standard Course of Study						
Element b. Evidence-based Practice.						
Element c. Evaluation and Identification						
Element d. Planning and Intervention						
Overall Rating for Standard 4						
<p>Comments:</p> <p>Recommended actions for improvement:</p> <p>Resources needed to complete these actions:</p>	<p>Evidence or documentation to support rating:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communications/observations of mentoring/supervisory activities <input type="checkbox"/> Reports of formal and informal peer review <input type="checkbox"/> Documentation of professional development/continuing competence activities <input type="checkbox"/> Documentation of services provided (evaluations, IEP development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.) <input type="checkbox"/> Documentation of service on committees, work groups and special projects <input type="checkbox"/> Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) <input type="checkbox"/> Minutes, attendance logs and agendas from meetings <input type="checkbox"/> Documentation of trainings, in-services and workshop presentations; and related materials (agendas, handouts, feedback) <input type="checkbox"/> Documentation of program review and planned/implemented development activities <input type="checkbox"/> Documentation of use of professional, student, program, and school wide data in making service/intervention decisions <input type="checkbox"/> Documentation of professional certifications/memberships/specialty certifications <input type="checkbox"/> Documentation of professional development plan, including progress towards goals and self-assessment <input type="checkbox"/> Documentation of professional development/competence activities in use of occupations, assessment tools and educationally relevant services <input type="checkbox"/> Documentation of research activities, publications, article reviews. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 					

Standard 5: School-based occupational therapists use all available data to examine their effectiveness and to adapt and improve professional practice.		Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Element a. Professional Development.						
Element b. Outcomes						
Overall Rating for Standard 5						
<p>Comments:</p> <p>Recommended actions for improvement:</p> <p>Resources needed to complete these actions:</p>	<p>Evidence or documentation to support rating:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communications/observations of mentoring/supervisory activities <input type="checkbox"/> Reports of formal and informal peer review <input type="checkbox"/> Documentation of professional development/continuing competence activities <input type="checkbox"/> Documentation of services provided (evaluations, IEP development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.) <input type="checkbox"/> Documentation of service on committees, work groups and special projects <input type="checkbox"/> Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) <input type="checkbox"/> Minutes, attendance logs and agendas from meetings <input type="checkbox"/> Documentation of trainings, in-services and workshop presentations; and related materials (agendas, handouts, feedback) <input type="checkbox"/> Documentation of program review and planned/implemented development activities <input type="checkbox"/> Documentation of use of professional, student, program, and school wide data in making service/intervention decisions <input type="checkbox"/> Documentation of professional certifications/memberships/specialty certifications <input type="checkbox"/> Documentation of leadership activities in data collection, staff training and/or tool development <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 					

 School-Based Occupational Therapist Signature

 Date

 Principal/Evaluator Signature

 Date

Note: The school-based occupational therapist's signature on this form neither represents acceptance nor approval of the report. It does, however, indicate that the occupational therapist has reviewed the report with the evaluator and may reply in writing. The signature of the principal or evaluator verifies that the report has been reviewed and that the proper process has been followed according to the North Carolina State Board of Education Policy for the Occupational Therapists Evaluation Process.