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:									
Evaluator:	Dist	District:							
Date Completed:	Evaluator's Title:								
Standard 1 School-based occupational t leadership, advocacy, and collaborative	-		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:		activities Reports of formal and inform Documentation of profession competence activities Documentation of services p development, intervention pl Documentation of service of and special projects Communications, feedback at (parents, students, community Minutes, attendance logs and Documentation of trainings, presentations; and related may Documentation of program development activities Documentation of use of pr and school wide data in mak Documentation of profession specialty certifications Documentation of self-impre competence activities and/or	nal development/continuing provided (evaluations, IEP plans, data sheets, contact notes, progron committees, work groups and/or surveys from stakeholders (ity members, colleagues) d agendas from meetings (in-services and workshop aterials (agendas, handouts, feedback review and planned/implemented rofessional, student, program, king service/intervention decisions onal certifications/ memberships /						

Standard 2: School-based occupational therapists promote a respectful environment for diverse populations.					Proficient	Accomplished	Distinguished
Element a. Communication							
Element b. Least Restrictive Environment							
Element c. Diversity							
Overall Rating for Standard 2							
Recommended actions for improvement: Resources needed to complete these actions:		Communications/observa Reports of formal and info Documentation of profess Documentation of service development, intervention progress monitoring, prog Documentation of service special projects Communications, feedbace (parents, students, communications, students, communications, and related feedback) Documentation of training presentations; and related feedback) Documentation of program development activities Documentation of use of school wide data in making Documentation of profess specialty certifications Documentation of profess specialty certifications Documentation of profess competence activities on awareness Service on committees, w support diversity, cultural environments Student profiles document Documentation of collabor Documentation of activity	tions of formal positional design provide a plans, gress note on commercial and age gs, in-segment and age gs, in-segment and age growing services in a service of the professional dediversity ork growing awaren ted in woration/oy planning to the provided and the provided area of th	mento eer revelopided (evelopided) (evelopid	ring/sup iew ment/cor aluation neets, co vice log s, work eys from colleag om mee and wor endas, ha blanned/ tudent, p rvention tions/me ment/cor ural attitu d special d range of reports attion wit	stakehologues) tings tkshop andouts, timpleme torogram, decision embership tinuing tinuing the ESL te	es, nd ders nted and s os/
	٥	incorporate cultural awar		ng/mp	iementa	non to	

Standard 3: School-based occupational therap knowledge of their profession within education	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									
Recommended actions for improvement:	 Communications/observations of activities Reports of formal and informal Documentation of professional competence activities Documentation of services provided 	activities Reports of formal and informal peer review Documentation of professional development/continuing competence activities Documentation of services provided (evaluations, IEP							
Recommended actions for improvement:	progress monitoring, progress n ☐ Documentation of service on conspecial projects ☐ Communications, feedback and (parents, students, community n ☐ Minutes, attendance logs and ag	special projects Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues) Minutes, attendance logs and agendas from meetings							
Resources needed to complete these actions:	development activities Documentation of use of professchool wide data in making service. Documentation of professional specialty certifications Documentation of data collection to guide student/program service.	erials (agendas, handouts, eview and planned/implemented fessional, student, program, and ervice/intervention decisions al certifications/ memberships/ tion, interventions and outcomes ices ork groups for program and policy dministration and management ads, student files, calendars, quipment inventory) I standards and best practice and documentation							

Standard 4: School-based occupational therapists apply the skills and knowledge of their profession within educational settings.					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									
Comments:		lence or documentation to sup							
		Communications/observations of mentoring/supervisory activities Reports of formal and informal peer review Documentation of professional development/continuing competence activities Documentation of services provided (evaluations, IEP							
Recommended actions for improvement:		progress monitoring, progress Documentation of service on of special projects Communications, feedback and	rention plans, data sheets, contact note g, progress notes, service logs, etc.) ervice on committees, work groups an eedback and/or surveys from stakehold community members, colleagues)						
Resources needed to complete these actions:		feedback) Documentation of program redevelopment activities Documentation of use of profeschool wide data in making se Documentation of professional specialty certifications Documentation of professional progress towards goals and se Documentation of professional activities in use of occupation educationally relevant services	as, in-services and workshop materials (agendas, handouts, in review and planned/implemented professional, student, program, and g service/intervention decisions ional certifications/memberships/ ional development plan, including d self-assessment ional development/competence tions, assessment tools and						

Standard 5: School-based occupational the examine their effectiveness and to adapt a practice.	Not Demonstrated	Developing	Proficient	Accomplished	Distinguished						
Element a. Professional Development.											
Element b. Outcomes											
Overall Rating for Standard 5 Comments:	Evid	lence or documentation to support	rating								
Recommended actions for improvement:		Reports of formal and informal peer review Documentation of professional development/continuing compete activities Documentation of services provided (evaluations, IEP development intervention plans, data sheets, contact notes, progress monitoring progress notes, service logs, etc.) Documentation of service on committees, work groups and speci projects Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues)									
Resources needed to complete these actions:		Documentation of trainings, in-services and workshop presentations and related materials (agendas, handouts, feedback) Documentation of program review and planned/implemented development activities Documentation of use of professional, student, program, and school wide data in making service/intervention decisions Documentation of professional certifications/memberships/specialty certifications Documentation of leadership activities in data collection, staff training and/or tool development									
School-Based Occupational Therapist Signat Principal/Evaluator Signature	ure	Date 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.