

Rubric for Evaluating North Carolina’s School-Based Occupational Therapists

Standard 1: School-based occupational therapists demonstrate leadership, advocacy, and collaborative and ethical practice.				
Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
Element a. Leadership. School-based occupational therapists support and promote high professional standards for themselves and for their colleagues. They are knowledgeable of and actively implement school, department, district, State, and professional goals and provide guidance to others in doing likewise.				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensures the safety of the occupational therapy service delivery process. <p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The scope of school-based occupational therapy practice, including philosophy, principles, theories, and practice concepts; <input type="checkbox"/> Standards, regulations, and laws that impact school-based practice; <input type="checkbox"/> Goals of the district, department, and school. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Articulates information about school-based occupational therapy practice and philosophy. <input type="checkbox"/> Participates in developing and/or implementing the goals and priorities outlined in the district and department improvement plan. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assumes leadership roles in the department. <input type="checkbox"/> Plans and implements educational programs for department and school staff. <input type="checkbox"/> Ensures the effectiveness of the occupational therapy service delivery process. <input type="checkbox"/> Participates in hiring, mentoring, and/or supporting other occupational therapists, interns, or school-based occupational therapy students. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assists other staff with understanding and applying regulations and policies that impact school-based occupational therapy. <input type="checkbox"/> Provides input into the update of state and district policies and procedures designed to help occupational therapists operationalize district, State, and federal laws and regulations. <input type="checkbox"/> Guides others to develop professional goals and skills. 	

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<p>Element b. Teamwork. School-based occupational therapists work collaboratively with school and LEA personnel to create professional learning communities that enhance student learning and create positive working environments. School-based occupational therapists provide input into the selection of professional development to build staff capacity and address the needs of students. They anticipate, problem-solve, and share the workload of the department.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Establishes professional relationships with colleagues. <input type="checkbox"/> Responds to school staff and parents' requests in a timely manner. <input type="checkbox"/> Adheres to approved procedures for communicating with school staff, parents and students. <p>Contributes to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> IEP meetings and processes; <input type="checkbox"/> Departmental and professional meetings. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contributes to a positive, productive, cooperative, and supportive work environment. <input type="checkbox"/> Collaborates with educational personnel as essential partners in implementing student plans. <input type="checkbox"/> Uses an occupation-based approach to collaborate with the team to achieve student outcomes. <input type="checkbox"/> Educates school personnel, parents, and students about occupational therapy services. <input type="checkbox"/> Maintains contact with community agencies and professionals. 	<p>and...</p> <p>The occupational therapist:</p> <p>Models positive interactions with:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Students; <input type="checkbox"/> Parents; <input type="checkbox"/> Other occupational therapists; <input type="checkbox"/> Educators; <input type="checkbox"/> Members of the school community. <ul style="list-style-type: none"> <input type="checkbox"/> Initiates new partnerships with community agencies and professionals. <input type="checkbox"/> Shares ideas to help colleagues in times of need. <input type="checkbox"/> Participates in departmental committees or work groups. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in school, community, state, and/or national committees or task forces. <input type="checkbox"/> Leads IEP meetings to resolve complex situations to meet student needs. 	

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<p>Element c. Vision. School-based occupational therapists embrace, communicate, and contribute to the strategic vision of the local district, department and assigned schools to help ensure that all students are equipped and prepared with life skills for the 21st century. School-based occupational therapists articulate core beliefs and values of the profession, department and local district. They establish standards of excellence to create a professional learning community.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Is aware of the department/school/district vision that all students are prepared for the 21st century. <input type="checkbox"/> Is aware of national professional vision, core values, and beliefs. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in implementing the department/school/district vision. <p>Articulates a vision for:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Students; <input type="checkbox"/> Occupational therapy department/program; <input type="checkbox"/> Exceptional Child department; <input type="checkbox"/> School/District. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Monitors progress toward achieving the department/school/district vision. <input type="checkbox"/> Adjusts programs in order to address local trends and issues. <p>Assists others in:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Adhering to professional standards and values; <input type="checkbox"/> Achieving professional goals. 	<p>and...</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in developing the department/school/district vision. <input type="checkbox"/> Instills in others a desire to improve student outcomes. <input type="checkbox"/> Articulates and develops goals for the department and district. <input type="checkbox"/> Anticipates and prepares for current and future professional trends on state or national level. 	

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<p>Element d. Ethics. School-based occupational therapists exhibit high ethical standards. School-based occupational therapists demonstrate honesty, integrity, fair treatment, and respect for others. They uphold relevant codes of ethics and standards of professional practice.</p>				
<p>The occupational therapist:</p> <p>Abides by:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The <i>Code of Ethics for North Carolina Educators</i>; <input type="checkbox"/> Code of <i>Professional Practice and Conduct for North Carolina Educators</i>. <input type="checkbox"/> <i>American Occupational Therapy Association Code of Ethics</i>; <input type="checkbox"/> <i>American Occupational Therapy Association Standards of Practice</i>; <p>(See Appendix A).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Accepts responsibility for actions and decisions that affect student outcomes. <input type="checkbox"/> Respects the dignity, privacy, and confidentiality of students, families, and other professionals. <input type="checkbox"/> Participates in ethics training and/or education. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> References applicable local, state, and professional standards to guide ethical decision making in school-based practice. <input type="checkbox"/> Reports unsafe or unethical situations to appropriate entity. <input type="checkbox"/> Consults with supervisor or ethics committee to resolve ethical issues. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Encourages colleagues to uphold high ethical standards. <input type="checkbox"/> Models respect for the dignity, privacy, and confidentiality of others within the work environment. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Models the profession's ethical principles and core values when assessing, clarifying, and resolving potential ethical and/or regulatory conflicts. <input type="checkbox"/> Contributes to the development of departmental policies and protocols related to ethics. <input type="checkbox"/> Provides professional development on ethics. 	

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<p>Element e. Advocacy. School-based occupational therapists advocate for positive changes in policies and practices affecting student learning and occupational therapy programs and service delivery. They participate in the implementation of initiatives designed to improve educational and support services to promote positive student outcomes, particularly through promoting disability awareness in the school and district. They advocate for research-based, policy-compliant services to address student needs.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Knows about policies and practices affecting student learning. <input type="checkbox"/> Knows about policies and practices affecting occupational therapy programs and service delivery. <input type="checkbox"/> Knows about disability awareness at the school and district level. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Supports policies and practices affecting student learning. <input type="checkbox"/> Supports policies and practices affecting occupational therapy programs and service delivery. <input type="checkbox"/> Supports disability awareness at the school and district level.. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in developing policies and practices affecting student learning. <input type="checkbox"/> Participates in developing policies and practices affecting occupational therapy programs and service delivery. <input type="checkbox"/> Participates in developing policies and practices regarding disability awareness at the school and district level. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Actively participates, promotes, and provides strong supporting evidence for implementation of initiatives to improve education. <input type="checkbox"/> Actively participates, promotes, and provides strong supporting evidence for implementation of initiatives to improve occupational therapy programs and service delivery. <input type="checkbox"/> Actively participates, promotes, and provides strong supporting evidence for implementation of initiatives to improve disability awareness at the school and district level. 	

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<p>Element f. Supervision and Oversight. School-based occupational therapists value supervision that provides support, education, monitoring of service delivery, and creates a safe forum to reflect on professional practice to positively impact student learning outcomes.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Understands the importance of the supervision process. <input type="checkbox"/> Seeks feedback from supervisors and colleagues. <input type="checkbox"/> Modifies behavior based on supervisory feedback. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in the supervisory process to increase professional knowledge and skills. <input type="checkbox"/> Supervises and provides feedback to assigned staff, fieldwork students, and volunteers. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provides education and training of staff, fieldwork students, and volunteers. <input type="checkbox"/> Positively impacts the work of colleagues by sharing best practice strategies. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develops and oversees fieldwork student and/or mentoring program. <input type="checkbox"/> Supervises/oversees occupational therapy-generated programs. <input type="checkbox"/> Assists other staff in identifying professional goals. 	
<p>Examples of artifacts that may be used to demonstrate performance:</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 self-improvement plan, continuing competence activities and/or grants, aligned with professional, district/school and department's vision/mission and goals/ improvement plans 				
<p>Evaluator Comments: (Required for all "Not Demonstrated" ratings, recommended for all ratings.)</p>				
<p>Comments of Person Being Evaluated: (Optional)</p>				

Standard 2: School-based occupational therapists promote a respectful environment for diverse populations.				
Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
Element a. Communication. School-based occupational therapists use language that is appropriate and easily understood by the listener, and they adapt their communication for their audiences. They are active listeners, respect cultural differences, and assist others in communicating effectively.				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Uses active listening strategies. <p>Expresses self clearly and accurately:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Orally; <input type="checkbox"/> In writing. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Adapts communication to the unique characteristics and backgrounds of the audience. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Facilitates effective communication between and among students, families, educators, and other professionals. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communicates persuasively to a variety of audiences. <input type="checkbox"/> Provides a range of resources and services that address student, family, and community needs. 	
Element b. Least Restrictive Environment. School-based occupational therapists help to ensure that every student receives services in the least restrictive environment. They continually monitor service delivery to reflect the least restrictive environment for the students they serve. They actively assist other school personnel to develop and implement appropriate contexts and strategies for students with differing needs.				
<p>The occupational therapist:</p> <p>Articulates the:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Range of environments in which students may be served; <input type="checkbox"/> Dynamic nature of occupation in the least restrictive environment. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provides services in the least restrictive environments. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Encourages and supports team members to serve every student in the least restrictive environment. <input type="checkbox"/> Actively engages others in work that supports students' unique learning and developmental needs. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Trains families and other professionals to understand the range of learning environments available for students. <input type="checkbox"/> Expands and enhances knowledge and awareness of the full range of support least restrictive environments at the department, school, and district levels. 	

Standard 2: School-based occupational therapists promote a respectful environment for diverse populations.				
Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
Element c. Diversity. School-based occupational therapists recognize the influence of race, ethnicity, gender, religion, health, culture, ability, and other factors on development and personality. They adapt professional activities to reflect these differences among the students, families, and staff they serve. School-based occupational therapists create and encourage an environment that is inviting, respectful, supportive, inclusive, and flexible for every student.				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Acknowledges the influence of race, ethnicity, gender, religion, socio-economics, and culture on students' development and attitudes. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Respects and embraces diversity/perspectives of others. <input type="checkbox"/> Understands own position on matters of diversity and reflects on and changes position as appropriate. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Models understanding and respect for cultural differences. <input type="checkbox"/> Creates situations in which students may demonstrate understanding of and respect for diversity. <input type="checkbox"/> Encourages others to understand and respect students' diversity. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Promotes a deep understanding of diversity through the integration of culturally sensitive materials. <input type="checkbox"/> Participates in the development of department, school, and/or district policies to promote respect and understanding of diversity. <input type="checkbox"/> Works at the state and national level to promote engagement of individuals from diverse backgrounds in the profession. 	

Examples of artifacts that may be used to demonstrate performance:

- 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 development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.)
- Documentation of service on committees, work groups and special projects
- Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues)
- Minutes, attendance logs and agendas from meetings
- 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 professional development/continuing competence activities on diversity, cultural attitudes and awareness
- Service on committees, work groups and special projects to support diversity, cultural awareness and range of student environments
- Student profiles documented in written reports
- Documentation of collaboration/cooperation with ESL teachers
- Documentation of activity planning /implementation to incorporate cultural awareness

Evaluator Comments: (Required for all “Not Demonstrated” ratings, recommended for all ratings.)

Comments of Person Being Evaluated: (Optional)

Standard 3: School-based occupational therapists apply the skills and knowledge of their profession within educational settings.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element a. Program Administration and Management. School-based occupational therapists effectively structure work tasks in accordance with local, state, and federal requirements and best practice guidelines. School-based occupational therapists assume professional responsibility for safe, effective, and timely delivery of occupational therapy (OT) services; and the oversight and/or improvement of occupational therapy systems and services.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prioritizes and schedules work tasks. <input type="checkbox"/> Maintains current student files for use by authorized school personnel. <input type="checkbox"/> Seeks information about best practice guidelines which impact program administration. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Manages inventory of therapeutic equipment and assessments. <input type="checkbox"/> Contributes data for budget planning. <input type="checkbox"/> Submits administrative reports as required. 	<p>... and</p> <p>The occupational therapist:</p> <p>Ensures that workloads are:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reasonable. <input type="checkbox"/> Evenly distributed. <ul style="list-style-type: none"> <input type="checkbox"/> Makes appropriate materials and assessments available for use. <input type="checkbox"/> Collects and analyzes data to improve the occupational therapy program. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Shares effective work place processes and materials with other districts or states. <input type="checkbox"/> Consistently collects and uses data to make decisions regarding administration and management of the occupational therapy program. 	
<p>Element b. Policies and Laws. School-based occupational therapists are knowledgeable and skillful regarding state and federal legislation, professional standards, best practice guidelines, and local policy.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Abides by all NCBOT, AOTA, IDEA, DPI, and local policies, standards, and best practice guidelines 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensures program compliance with NCBOT, AOTA, IDEA, DPI, and local policies, standards, and best practice guidelines. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Shares knowledge of current legislative and procedural issues that affect students and school-based practice. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates on state or national task forces to develop best practice guidelines for school-based occupational therapy. <input type="checkbox"/> Participates in policy revision and/or development at local, state, or federal level. 	

Standard 3: School-based occupational therapists apply the skills and knowledge of their profession within educational settings.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element c. Work behaviors. School-based occupational therapists are flexible, efficient, timely, reliable, and competent. They are engaged and responsive team members, as evidenced by adhering to deadlines, setting priorities, and setting appropriate limits. They are productive and complete assigned work with a positive attitude. They demonstrate safe, healthy, and ergonomically correct work practices.</p>				
<p>The occupational therapist:</p> <p>Demonstrates:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Safe work practices; <input type="checkbox"/> A positive professional approach to the work; <input type="checkbox"/> Healthy and ergonomically correct work practices; <input type="checkbox"/> Eagerness to learn. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Completes assigned work with a positive attitude. <input type="checkbox"/> Is self-directed. <input type="checkbox"/> Uses time and resources efficiently. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates flexibility, adaptability and agility in approach. <input type="checkbox"/> Promotes a positive attitude in colleagues 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Is viewed by peers, colleagues, and leadership as being an example of excellence with respect to attitude, skills, and professionalism. 	
<p>Examples of artifacts that may be used to demonstrate performance:</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"/> 				

Evaluator Comments: (Required for all “Not Demonstrated” ratings, recommended for all ratings.)

Comments of Person Being Evaluated: (Optional)

Standard 4: School-based occupational therapists facilitate student learning for optimal student performance and functional independence.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element a. North Carolina Standard Course of Study. School-based occupational therapists ground their practice in school-related occupations and support student progress in the North Carolina Standard Course of Study (Common Core and Essential Standards).</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Articulates school-related occupations across grade levels. <input type="checkbox"/> References the <i>North Carolina Standard Course of Study</i> in occupational therapy practices and processes. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Uses the <i>North Carolina Standard Course of Study</i> to facilitate student progress in school-related occupations. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Guides others in using the <i>North Carolina Standard Course of Study</i> to facilitate student progress in school-related occupations. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develops and presents workshops, in-services, or presentations on using the <i>North Carolina Standard Course of Study</i> to facilitate student progress in school-related occupations. 	
<p>Element b. Evidence-based Practice. School-based occupational therapists plan, deliver, and revise appropriate interventions based on evaluation data. They review current occupational therapy and other pertinent professional literature; use reliable, valid assessments; plan interventions based on research; build and work from their own clinical knowledge and expertise; and evaluate the effectiveness of their work based on analysis of evidence.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Defines evidence-based practice. <input type="checkbox"/> Locates evidence resources. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provides evidence-based occupational therapy services. <input type="checkbox"/> Uses professional literature, continuing education content, client evidence, and clinical experience to make decisions. <input type="checkbox"/> Modifies interventions based on evidence. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Investigates and selects alternative research-based approaches to develop and revise plans of care. <input type="checkbox"/> Participates in research activities. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provides training regarding evidence-based practice. <input type="checkbox"/> Contributes to the professional evidence base by presenting/publishing findings. 	

Standard 4: School-based occupational therapists facilitate student learning for optimal student performance and functional independence.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element c. Evaluation and Identification. School-based occupational therapists gather student performance data using contextual observation, standardized assessments, interviews, file reviews, student work samples, and other inquiry methods as deemed appropriate. They interpret evaluation data for the student’s team to assist with decisions regarding special education eligibility, goals, placement, accommodations, supports, and services. School-based occupational therapists serve on student intervention teams as appropriate, consult on classroom interventions, and provide strategies to build teacher capacity for instructing a variety of learners.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Completes and documents occupational therapy evaluation results. <input type="checkbox"/> Adheres to data collection time lines, formats, and standards, required by local, state, and federal policies. <input type="checkbox"/> Gathers data from teachers and parents. <input type="checkbox"/> Actively pursues competence in administration of standardized assessments. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Evaluates student’s ability to participate in life at school. <input type="checkbox"/> Identifies and analyzes school-based occupations the student wants and needs to perform. <input type="checkbox"/> Assesses environments in which student occupations occur. <input type="checkbox"/> Shares and interprets relevant evaluation data with team members. <input type="checkbox"/> Demonstrates competence in selection and use of standardized assessments. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates keen, insightful evaluation and reporting skills. <input type="checkbox"/> Mentors and educates team members on applicability of technical evaluation data to school context. <input type="checkbox"/> Educates current and potential referral sources about the scope of occupational therapy services and the process of initiating occupational therapy evaluation. <input type="checkbox"/> Promotes the acquisition and use of current assessment tools and processes. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Holds specialty certification in particular assessment types. <input type="checkbox"/> Develops data collection tools and trains others in their use. 	

Standard 4: School-based occupational therapists facilitate student learning for optimal student performance and functional independence.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element d. Planning and Intervention. School-based occupational therapists carefully consider evaluation data, IEP goals, ongoing progress monitoring data, and the least restrictive environment in planning services that meet the needs of students. They intervene in the context in which the student routinely performs the targeted skill or ability, in collaboration with instructional staff. Interventions are connected to student participation in learning the curriculum, demonstration of knowledge, life a career skills, socialization, and transition.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Uses interventions that are appropriate for student’s age, grade, cognitive level, interests, and aptitudes. <input type="checkbox"/> Expands repertoire of intervention ideas/options. <input type="checkbox"/> Delivers occupation-based, educationally relevant occupational therapy services. <input type="checkbox"/> Adheres to IEP in planning and providing interventions. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Examines intervention effectiveness. <input type="checkbox"/> Modifies the intervention plan based on changes in the student’s needs, goals, and performance. <input type="checkbox"/> Facilitates the transition or exit process in collaboration with IEP team. <input type="checkbox"/> Adapts, accommodates, and modifies environment, including assistive technology and training instructional staff. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates innovative and unique occupation-based intervention planning. <input type="checkbox"/> Demonstrates consistent energy and enthusiasm for providing intervention. <input type="checkbox"/> Leads collaborative, long-term, and/or project-based interventions at the classroom and school level. <input type="checkbox"/> Describes/explains instances of therapeutic use of self. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Presents at state or national conferences on innovative interventions. 	

Examples of artifacts that may be used to demonstrate performance:

- 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 development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.)
- Documentation of service on committees, work groups and special projects
- Communications, feedback and/or surveys from stakeholders (parents, students, community members, colleagues)
- Minutes, attendance logs and agendas from meetings
- 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 professional development plan, including progress towards goals and self-assessment
- Documentation of professional development/competence activities in use of occupations, assessment tools and educationally relevant services
- Documentation of research activities, publications, article review

Evaluator Comments: (Required for all “Not Demonstrated” ratings, recommended for all ratings.)

Comments of Person Being Evaluated: (Optional)

Standard 5: School-based occupational therapists use all available data to examine their effectiveness and to adapt and improve professional practice.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
<p>Element a. Professional Development. School-based occupational therapists continually participate in high quality professional development specific to school-based occupational therapy practice that reflects a global view of educational practices, includes 21st century skills and knowledge, and aligns with the State Board of Education priorities and initiatives. They use input from stakeholders, to continually assess, maintain, expand, and document their competence in school-based practice.</p>				
<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identifies strengths and needs drawing from multiple data sources. <input type="checkbox"/> Adheres to the approved professional development plan. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participates in relevant continuing competence activities to improve school-based practice. <input type="checkbox"/> Completes formal self-assessment. <input type="checkbox"/> Participates in peer-review. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Presents at local, regional or state, professional conferences. <input type="checkbox"/> Routinely shares new knowledge with others. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Earns a specialty certification relevant to school-based practice. <input type="checkbox"/> Presents at state or national professional conferences. <input type="checkbox"/> Participates as an occupational therapy representative on state or national committees and organizations. 	

Standard 5: School-based occupational therapists use all available data to examine their effectiveness and to adapt and improve professional practice.

Developing	Proficient	Accomplished	Distinguished	Not Demonstrated (Comment Required)
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Element b. Outcomes. School-based occupational therapists systematically and critically evaluate the effectiveness of comprehensive occupational therapy services on student performance. They collect and interpret data from a variety of sources to assess student response to intervention and progress, plan future services, and adapt practice to best meet the needs of students, staff, and families.

<p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Monitors and documents student progress. <input type="checkbox"/> Reports student progress to team members. 	<p>... and</p> <p>The occupational therapist:</p> <p>Evaluates effectiveness of occupational therapy services using:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Multiple methods; and <input type="checkbox"/> Multiple data sources. <input type="checkbox"/> Selects outcome measures related to the student's ability to engage in occupations at school. <input type="checkbox"/> Identifies and uses progress monitoring tools. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Leads the collection, interpretation, and reporting of student outcome data within multi-disciplinary teams. <input type="checkbox"/> Synthesizes data on student progress and current research to design and inform future actions. 	<p>... and</p> <p>The occupational therapist:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Creates innovative progress monitoring tools <input type="checkbox"/> Publishes or presents an efficacy study or case study in an occupational therapy text or journal. 	
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Examples of artifacts that may be used to demonstrate performance:

- 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 development, intervention plans, data sheets, contact notes, progress monitoring, progress notes, service logs, etc.)
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- 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
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Evaluator Comments: (Required for all “Not Demonstrated” ratings, recommended for all ratings.)

Comments of Person Being Evaluated: (Optional)

Rubric Signature Page

Occupational Therapist Signature

Date

Principal/Evaluator Signature

Date

Principal/Evaluator Signature

(Signature indicates question above regarding comments has been addressed)

Date

Note: The occupational therapist’s signature on this form represents neither 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 School-Based Occupational Therapist Evaluation Process.