

LEGALLY AND PROFESSIONALLY DEFENSIBLE EVALUATION REPORT CHECKLIST

The Evaluation Report Checklist has two intended purposes: (1) a tool to guide a discussion between evaluators and administrators regarding the preferred contents of evaluation reports and (2) a tool to provide formative feedback to report writers. Evaluators can self-rate their progress during the writing phase. They can also use the checklist to identify weaknesses or areas that need to be addressed in their evaluation report(s). When two or more persons work on the same report, the checklist can serve as a tool to delegate, coordinate, and monitor progress among the contributors.

Instructions: Rate each component of the report using the following rubrics. Fill in the circle or place a check mark in the cell that corresponds to your rating on each checkpoint. If the item or checkpoint is not applicable to the report, indicate the "NA" cell to the far right. Additional checkpoints may be added as agreed upon by those using the checklist.

1=Not addressed, 2=Partially addressed, 3=Fully addressed, NA=Not applicable

	1	2	3	NA
1. Reasons for Referral				
A. Rationale for evaluation is provided, including concerns, recent history and behaviors that lead to referral	①	②	③	○
B. Clear statement of the areas or domains to be assessed	①	②	③	○
C. A statement of what disabilities are suspected	①	②	③	○
Comments:				

	1	2	3	NA
2. Evaluation Questions				
A. The report includes current levels of functioning questions.	①	②	③	○
B. The report includes disability category questions	①	②	③	○
C. The report includes "what do we need to do differently?" questions	①	②	③	○
Comments:				

	1	2	3	NA
3. Background/History				
A. There is sufficient information to situate the student in a developmental, social and educational context	①	②	③	○
B. Discusses factors that might play a role in explaining the concerns raised by the referring team	①	②	③	○
Comments:				

	1	2	3	NA
4. Evaluation Results				
A. Assessment data interpreted from multiple sources in the context of the referral questions	①	②	③	○
B. Evaluation results are presented using themes as headings or thematic statements to answer each evaluation questions.	①	②	③	○
C. The interpretation and integration of assessment data are not left to the Conclusion or Summary section, but rather, are ongoing and explicit throughout the report	①	②	③	○
D. Information regarding the student's strengths as well as needs are clearly included	①	②	③	○
E. The referral questions are restated and clearly answered	①	②	③	○
Comments:				

5. Recommendations				
A. Recommendations are directly tied to the assessment results.	①	②	③	○
B. The recommendations are specific to this student and not generic.	①	②	③	○
C. The recommendations are explained insufficient detail so that a teacher or school team can carry them out.	①	②	③	○
D. The recommendation reflect an understanding of the classroom environment and the curriculum.	①	②	③	○
Comments:				

6. Writing Strategies				
A. The report documents how legal guidelines were met rather than simply stating that they were met.	①	②	③	○
B. Professional jargon is minimized and clear behavioral examples are provided for technical terms used	①	②	③	○
C. Generic statements, redundancies and excessive wordiness are absent.	①	②	③	○
D. The active rather than passive voice is used as much as possible	①	②	③	○
E. Referral questions and themes are used to integrate data and highlight relevant evaluation findings	①	②	③	○
Comments:				

1 2 3 NA

7. General Report Components				
A. There is a logical connection between each aspect of the evaluation, including, a) the reason for referral, b) evaluation questions, c) procedures used to conduct the evaluation, d) the recommendations.	①	②	③	○
B. All the areas of suspected disability are assessed but not areas irrelevant to suspected disability	①	②	③	○
C. All areas of suspected need are assessed	①	②	③	○
D. The reasons for a disability classification are explained in understandable terms.	①	②	③	○
E. The evaluation provides information that helps school team work more effectively with the student	①	②	③	○
F. The evaluation includes functional information grounded in real-life contexts	①	②	③	○
J. The evaluation provides information leading directly to interventions and/or accommodations	①	②	③	○
Comments:				

8. Evaluation Plan				
A. Consultation with referring parties (parent & teachers) identified areas of concern and referral questions	①	②	③	○
B. From the concerns clear evaluation questions were identified	①	②	③	○
C. The assessment plan was developed to directly answer the referral questions	①	②	③	○
D. A variety of evaluation tools were chosen (i.e., RIOT)	①	②	③	○
E. The evaluation tools provide data that will help parents and teachers who work with students.	①	②	③	○
F. The tools and procedures were reliable and valid	①	②	③	○
G. The evaluation tools collect functional data grounded in real life	①	②	③	○
Comments:				