

Metacognitive Strategy Data

SECTION 1 · MAP THE STRATEGIES

STRATEGY USE MONITORING

LOG

Strategy-Selection Observation Log

One row per task where a strategy choice was observed. This page asks whether the CHOICE fit the task, not whether the strategy was used well once picked.

STUDENT

STRATEGIES AVAILABLE (FROM THE INVENTORY)

SETTING

#	DATE	TASK / ASSIGNMENT	STRATEGY STUDENT CHOSE (OR "NONE")	FIT FOR THE TASK?	SELECTED HOW (CODE BELOW)
1				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
2				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
3				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
4				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
5				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
6				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
7				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
8				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
9				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
10				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
11				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	

SELECTION CODES

CODE	HOW THE STRATEGY WAS SELECTED (USED ON PAGES 8, 10)
I	Independent — chosen or applied without a reminder
V	After a verbal reminder
M	After the adult modeled or walked through it
X	Not observed / no clear opportunity this session

WHAT "FIT" MEANS

Good fit — the strategy actually matched what the task needed. Partial fit — a reasonable try that was not quite the best tool. Not used — no strategy was chosen for a task that called for one. This page is about the CHOICE, not how well it was carried out once picked — that is page 9.

Page 8 of 24

BRIGHT PATH SPED

AND REFLECT

STRATEGY USE MONITORING

Business Tracking Across Tasks

Page 'helpfulness': not how it FELT, but what the outcome actually was. Pick one outcome (dependence) and keep it the same across rows.

GOAL (SHORT)

OUTCOME MEASURE USED (WRITE IT ONCE)

STRATEGY USED	OUTCOME (ACCURACY, TIME, OR INDEPENDENCE — PICK ONE AND KEEP IT)	EFFECTIVE?
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO
		☐ YES ☐ SOMEWHAT ☐ NO

EFFECTIVE IS A JUDGMENT CALL, AND THAT IS FINE

Write the outcome first, then mark whether the strategy looks like the reason it went that way, in your own professional judgment. A SOMEWHAT mark is honest data, not a failed row.

Monitoring Editable

Page 12 of 24

BRIGHT PATH SPED

What Is Inside, and Where

24 pages: three sections, a worked example, and this map. No page here names a category or a label for the student; every strategy, step and scale is written in by the team, from what is actually taught.

Before you begin

PAGE 4



Start Here — Three Steps
START HERE **4**

01 Map the Strategies

PAGES 6–9



Caseload Roster
ROSTER **6**



Strategy-Use Inventory
INVENTORY **7**



Strategy-Selection Observation Log
LOG **8**



Strategy-Application Fidelity Checklist
CHECKLIST **9**

02 Rate, Track and Reflect

PAGES 11–16



Student Self-Rating of Strategy Helpfulness
LOG **11**



Effectiveness Tracking Across Tasks
LOG **12**



Metacognitive Reflection Log
NOTES **13**



Cumulative Tracker
TRACKER **14**



Progress Graph
TRACKER **15**



Quarterly Growth in Strategy Repertoire
SUMMARY **16**

03 Share and Organize

PAGES 18–23



General Education Classroom Strategy-Use Observation Form
DATA **18**



Family and Team Update
FAMILY UPDATE **19**



Reflection and Report Phrase Bank
PHRASE BANK **20**



Binder Cover and Spine Labels
ORGANIZER **21**



Divider Tab Set
ORGANIZER **22**



A Filled Example, Six Weeks of Data
EXAMPLE **23**

READING THE TAGS

Roster / Inventory — setup. **Log / Checklist** — filled around a task. **Notes** — open reflection. **Tracker / Summary** — the roll-up.

THREE DIFFERENT QUESTIONS, KEPT APART ON PURPOSE

Choice (page 8), fidelity (page 9) and result (page 12) — a strategy can be picked well and applied poorly, or applied well and still not help.

Start Here — Three Steps

Two minutes of reading. Set the roster and inventory up once; the logs are fast with a pen.



1

Set up once

List the strategies this student is taught on the inventory (page 7) and add the caseload to the roster (page 6).

Print the binder cover, spine labels (page 21) and divider tab set (page 22); slide the tabs into a folder or a binder section already in use.



2

Use it around the strategy

When a strategy choice comes up, log it (page 8). When you can watch the steps, check fidelity (page 9).

After a task, the student rates how helpful it felt (page 11); separately, log what actually happened (page 12).



3

Roll up and share

Copy ratings onto the tracker (page 14) and plot the graph (page 15); count the quarterly page (page 16) from the logs already on file.

Send the family update (page 19) and hand the classroom form (page 18) to the general education teacher when it helps.

WHAT THIS FILE IS

A fillable PDF: type into the logs and tables, or print and use a pen. The binder cover, spine labels and divider tabs print like any other page and are meant to be cut apart.

WHAT THIS FILE IS NOT

The Self-Monitoring/EF sheets already have a general strategy log and their own “Metacognitive Reflection Log.” This file is dedicated to strategy use alone: which strategies the student KNOWS, whether the RIGHT one was CHOSEN, fidelity to its steps, and repertoire growth over a quarter. Also not the Goal Progress self-assessment file. Not a Google Sheets, Doc, or word-processed file, and not a curriculum that teaches strategies.

THE RULE EVERY PAGE IN THIS FILE FOLLOWS

A rating describes how a strategy felt or worked for THIS task — nothing else. No page here sets a passing score, names a category for the student, or decides whether a goal is met; those calls stay with the team, using its own judgment.

IF SOMETHING DOES NOT WORK

The text disappears when I close it. It was opened in something that fills fields but does not save them.

Open it in Acrobat Reader and use Save As.

I need more rows than a table holds. Print the sheet twice and number the pages; the tracker (page 14) only needs the totals.

A tri-mark cell only takes one mark. On purpose. Whole sentences go in the notes column beside it, or on the reflection log (page 13).

Anything else — the Ask a Question tab on the product page. Every question is read, and a fix to the file is a free update.

INVENTORY

Strategy-Use Inventory

A working list of 12 common learning strategies. Mark what is taught and how independently the student already uses it; add rows for a strategy this list does not name.

STUDENT

SETTING / SUBJECT

DATE COMPLETED

#	STRATEGY	WHAT IT LOOKS LIKE WHEN IT IS USED	TAUGHT?	USES IT IN A REAL TASK?
1	Graphic organizer	Uses an organizer or concept map before starting a task	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
2	Breaking a task into steps (chunking)	Lists or numbers the parts of a task before beginning	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
3	Self-questioning while reading or working	Pauses to ask "does this make sense?" or a similar question	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
4	Checking work against a model or checklist	Compares finished work to an example or a rubric before turning it in	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
5	Mnemonic device or memory cue	Uses a made-up phrase, acronym or picture cue to remember steps or facts	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
6	Highlighting or annotating text	Marks up a text — underline, highlight, margin note — while reading	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
7	Retelling or summarizing in own words	Restates what was read or done without looking back at the source	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
8	Rehearsal or practice retrieval (self-testing)	Quizzes self on material instead of only re-reading it	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
9	Planning or pacing a task	Estimates how long a task will take and checks progress partway through	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
10	Asking for help at the right moment	Requests help after trying, not long before or long after getting stuck	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
11	Using a visual schedule or planner	Checks a written or pictured schedule to decide what comes next	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
12	Talking through steps out loud (verbal mediation)	Narrates the steps of a task while doing it	☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
13			☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET
14			☐ TAUGHT ☐ NOT YET ☐ N/A	☐ INDEPENDENT ☐ WITH A PROMPT ☐ NOT YET

A STARTING POINT, NOT THE ONLY STRATEGIES

Add one not named here in a blank row above. Not every student needs all 12, and a student can use a strategy this list does not name at all.



Strategy-Selection Observation Log

One row per task where a strategy choice was observed. This page asks whether the CHOICE fit the task, not whether the strategy was used well once picked.

STUDENT

STRATEGIES AVAILABLE (FROM THE INVENTORY)

SETTING

#	DATE	TASK / ASSIGNMENT	STRATEGY STUDENT CHOSE (OR "NONE")	FIT FOR THE TASK?	SELECTED HOW (CODE BELOW)
1				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
2				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
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8				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
9				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
10				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	
11				☐ GOOD FIT ☐ PARTIAL FIT ☐ NOT USED	

SELECTION CODES

CODE	HOW THE STRATEGY WAS SELECTED (USED ON PAGES 8, 18)
I	Independent — chosen or applied without a reminder
V	After a verbal reminder
M	After the adult modeled or walked through it
X	Not observed / no clear opportunity this session

WHAT "FIT" MEANS

Good fit — the strategy actually matched what the task needed. **Partial fit** — a reasonable try that was not quite the best tool. **Not used** — no strategy was chosen for a task that called for one. This page is about the CHOICE, not how well it was carried out once picked — that is page 9.



Effectiveness Tracking Across Tasks

A different question from page ‘helpfulness’: not how it FELT, but what the outcome actually was. Pick one outcome measure (accuracy, time, independence) and keep it the same across rows.

STUDENT

GOAL (SHORT)

OUTCOME MEASURE USED (WRITE IT ONCE)

#	DATE	TASK / SETTING	STRATEGY USED	OUTCOME (ACCURACY, TIME, OR INDEPENDENCE — PICK ONE AND KEEP IT)	EFFECTIVE?
1					☐ YES ☐ SOMEWHAT ☐ NO
2					☐ YES ☐ SOMEWHAT ☐ NO
3					☐ YES ☐ SOMEWHAT ☐ NO
4					☐ YES ☐ SOMEWHAT ☐ NO
5					☐ YES ☐ SOMEWHAT ☐ NO
6					☐ YES ☐ SOMEWHAT ☐ NO
7					☐ YES ☐ SOMEWHAT ☐ NO
8					☐ YES ☐ SOMEWHAT ☐ NO
9					☐ YES ☐ SOMEWHAT ☐ NO
10					☐ YES ☐ SOMEWHAT ☐ NO
11					☐ YES ☐ SOMEWHAT ☐ NO

PICK ONE OUTCOME MEASURE AND KEEP IT

Accuracy (“4 of 5 correct”), time (“finished in 8 minutes”), or independence (“no prompts needed”) all work; switching measures row to row makes the trend impossible to read later.

EFFECTIVE IS A JUDGMENT CALL, AND THAT IS FINE

Write the outcome first, then mark whether the strategy looks like the reason it went that way, in your own professional judgment. A SOMEWHAT mark is honest data, not a failed row.

SUMMARY

Quarterly Growth in Strategy Repertoire

Count from the inventory (page 7) and the effectiveness log already on file; this page only counts, it does not decide whether a goal is met.

STUDENT

REPORTING PERIOD

COMPLETED BY

#	STRATEGY (SHORT)	INDEPENDENT AT START OF QUARTER?	INDEPENDENT NOW?	TIMES RATED EFFECTIVE THIS QUARTER	NOTES
1					
2					
3					
4					
5					
6					
7					
8					

GROWTH IN THE STRATEGY REPERTOIRE

Count from the inventory (page 7): how many of the 12 tracked strategies moved from “not yet independent” to “independent” this quarter.

INDEPENDENT AT START OF QUARTER (OF 12)

INDEPENDENT NOW (OF 12)

NEWLY INDEPENDENT THIS QUARTER (NAME THEM)

WHAT THIS PAGE DOES NOT DO

It does not decide whether a strategy goal is met — that stays with the team, using the goal’s own wording and the data already on file, not a count on this page alone.

USING IT BEFORE A MEETING

Pair a row here with the matching reflection (page 13) entry to bring one real quote in the student’s own words, not just a count.

EXAMPLE

A Filled Example, Six Weeks of Data

SAMPLE · INVENTED STUDENT

Elena is invented, grade 8, and so is every mark on this page. Every count in the summary can be re-counted from the rows above it.

SELECTION LOG EXCERPT (PAGE 8) — ELENA V., GRADE 8 (INVENTED), STRATEGY: SELF-QUESTIONING WHILE READING

#	DATE	TASK	FIT	SELECTED
1	9/8	Reading passage	GOOD FIT	I
2	9/10	Reading passage	GOOD FIT	I
3	9/12	Math word problem	NOT USED	X
4	9/15	Reading passage	PARTIAL FIT	V
5	9/17	Reading passage	GOOD FIT	I
6	9/19	Science article	GOOD FIT	I

EFFECTIVENESS LOG EXCERPT (PAGE 12)

#	DATE	OUTCOME (COMPREHENSION CHECK)	EFFECTIVE?
1	9/8	3 of 5 comprehension check items correct	SOMEWHAT
2	9/10	4 of 5 correct	YES
3	9/15	3 of 5 correct	SOMEWHAT
4	9/17	5 of 5 correct	YES
5	9/19	4 of 5 correct	YES

SELF-RATING LOG EXCERPT (PAGE 11) — TOTAL 18 OVER 5 USES, AVERAGE 3.6

#	DATE	HELPLESSNESS RATING (1-4)
1	9/8	3
2	9/10	4
3	9/15	3
4	9/17	4
5	9/19	4

REFLECTION, 9/19 (PAGE 13)

Why did it help? Stopping to ask myself a question kept me from just reading past the confusing part.

When else could I use it? Science readings, and directions for a lab.

What would I try differently? Write the question down instead of just thinking it, so I remember to check the answer.

QUARTERLY GROWTH LINE (PAGE 16)

#	STRATEGY	INDEPENDENT AT START	INDEPENDENT NOW	TIMES RATED EFFECTIVE	NOTES
1	Self-questioning while reading	No (needed a prompt)	Yes, most sessions	3 of 5	Moved from "with a prompt" to mostly independent this quarter

Strategies independent at start of quarter: 3 of 12 tracked on the inventory.
Strategies independent now: 5 of 12 — self-questioning (above) and checking work against a model are the two newly independent this quarter.

READING ELENA'S EXAMPLE

Six selection rows split 4 GOOD FIT, 1 PARTIAL FIT, 1 NOT USED (a math task where no strategy was chosen). Of the five reading and science tasks where self-questioning was actually used, 3 were rated effective and 2 somewhat — the two SOMEWHAT rows (9/8, 9/15) are also Elena's lower helpfulness ratings (3, not 4), the same pattern showing on two different pages. The 9/12 math task has no effectiveness or rating row at all, because no strategy was selected for it — a blank row is honest, not a missing one. No category or label is named anywhere.