

Undated month calendars, a deadlines and meetings list, two weekly layouts, a daily plan, a group lesson plan, meeting-prep and data-collection weeks, to-do by category, sub notes, a month reflection, year-end hand-off notes. Fillable PDF.

EXAMPLE One Week in October, Filled In

Ms. Ortiz and her six students are invented, and so is every date. The deadlines for October and the week of the 13th *could* be off on Sunday, every meeting on the list that day on the calendar.

Deadlines and meetings list (page 9) — October, Ms. Ortiz, six students (all invented)

DATE	STUDENT	WHAT IS DUE, OR WHAT THE MEETING IS	KIND	NOTE
Oct 3	Dora	Progress report, period 1, 1st home	FRI	X
Oct 9	Ben	Data pull for the November IEP	WED	X
Oct 14	Ben	Annual review, 3:15, conference room	mtg	
Oct 15	Ava	Progress report, period 1, sent home	WED	X
Oct 16	Elena	Parent conference, 8:00 Room 12	mtg	
Oct 17	Dora	IEP — to the team for comment	THU	
Oct 22	Finn	Invitation consent: follow-up call if not back	sat	
Oct 24	Finn	Re-evaluation planning meeting, 2:30	mtg	
Oct 25	Ava	Testing accommodations confirmed with the coordinator	other	

9 meets this month, 2 already kicked. The bold rows are the week of Oct 13. 4 items, 2 of them meetings. The month has 3 meetings in all; the 13th is the week after.

Weekly plan (page 10) — week of Oct 13, copied off the list on Sunday

BLOCK	MON OCT 13	TUE OCT 14	WED OCT 15	THU OCT 16	FRI OCT 17
Morning	8:30 Reading group Ana, Cara, Finn 8:30 Math, 3:15, Dev	8:30 Reading group Ana, Cara, Finn 8:30 Math, 3:15, Dev	8:30 Reading group Ana, Cara, Finn 8:30 Math, 3:15, Dev	8:00 Parent conference — Elena (see p. 12) 8:00 Math, 3:15, Dev	8:30 Reading group Ana, Cara, Finn 8:30 Math, 3:15, Dev
	11:00 Push-in science, Ben, Elena Lunch draft	11:00 Push-in science, Ben, Elena Ana's progress report sign in page	11:00 Push-in science, Ben, Elena Ana's progress report home today	11:00 Push-in science, Ben, Elena Planning group last record	11:00 Push-in science, Ben, Elena Foster pack up (17) copied to the binder
	1:00 Writing group Ana, Ben 2:30 Ben's draft read time free	1:00 Writing group Ana, Ben 2:30 Annual review last record	1:00 Writing group Ana, Ben 2:30 Data week (18) filled through Wed	1:00 Writing group Ana, Ben 2:30 Dev's draft to the team	1:00 Writing group Ana, Ben 2:30 Test review from last (19)
Afternoon					

BRIGHT PATH SPEED

How This Planner Is Laid Out

One page per habit. The month feeds the week, the week feeds the day, and Sunday takes twenty minutes. Undated: you type the month names and the dates, so it never expires.

PAGE	WHICH PAGE	WHICH HABIT, AND WHEN
5, 6	Year at a glance; caseload snapshot	August, once; checked on the last Friday of each month
7, 8, 9	Two month calendars; deadlines and meetings list	The first of the month, from the year page (5); then the day anything is booked
10, 11	Weekly plan, blocks or hourly	Sunday, twenty minutes, from this week's rows on page 9
12, 13	Daily plan; lesson and group plan	The afternoon before, from the week; the group plan weekly, per subject
14, 15	Meeting prep week; data collection week	Sunday, in the weeks with a meeting; every Sunday for the data week
16, 17	To-do by category; communication quick log	Whenever; the to-do page takes anything on the week that has no day
18	Substitute notes for the week	Sunday, in the sub folder; rewritten when the schedule changes
19, 20	Professional learning log; supplies tracker	As it happens; both are the pages you will be asked for in May
21, 22	Month reflection; year-end hand-off	Last Friday of the month; the last week of the year
23	One week in October, filled in	Read it first

Sunday, twenty minutes

- 1 Open the calendar (7) and the list (9); tick what got done.
- 2 Copy this week's rows onto the weekly plan (10 or 11), meetings first.
- 3 Fill must-do and waiting-on; anything with no day goes to page 16.
- 4 A row on the meeting prep week (14) per meeting; the data week (15) every week; sub notes (18) if the schedule changed.

How the pages feed each other

The year page (5) is filled once from the IEPs and the dates your district gives you. On the first of the month it becomes the list (9) and the calendar (7). On Sunday the list becomes the week (10 or 11); the afternoon before, the week becomes the day (12). A date lives on the list and is copied, so when it moves, it moves once.

A CASE MANAGER'S YEAR, TYPED, NOT ASSERTED: THE RIGHT COLUMN IS YOURS

MONTH	WHAT OFTEN LANDS IN A CASE MANAGER'S MONTH (YOURS MAY DIFFER)	YOUR DISTRICT'S DATES
Aug	Caseload known; schedules built; accommodations shared; year page (5) filled	
Sep	Start-of-year notes home; first data pulls; first meetings booked	
Oct	Fall meetings; first progress reports in many buildings; conferences in some	
Nov	Conferences; meetings; a short month, so the list (9) fills early	
Dec	Second reporting period in many buildings; sub notes (18) current for break	
Jan	Mid-year data; second-semester schedule changes; year page (5) re-read	
Feb	Often the heaviest meeting month; meeting prep week (14) every week	
Mar	Testing accommodations confirmed; third reporting period in many buildings	
Apr	Testing windows; transition and placement conversations for next year	
May	End-of-year meetings; final progress reports; hand-off notes (22) begun	
Jun	Files closed; hand-off finished; a blank copy Saved As for next year	
Jul	Summer programs if any; next year's year page started from this one	

Monthly Calendar

REPORTING PERIOD / THEME THIS MONTH

[illegible]

No-school days

Type the date in it (1, 2, 3 ...) and the day cell below is yours. Meetings go in as initials and a time ("JR AR 3:15"); due dates as initials and the thing ("MT PR"). The list on page 9 holds the rest, so a cell never needs a second line.

Monthly Deadlines and Meetings List

COPIED FROM THE YEAR PAGE ON

Special Education Teacher Planner

WEEK

Weekly Plan

Monday to Friday across, morning, midday and afternoon down. Students, groups, meetings and calls in the blocks; the must-do list and the waiting-on list underneath.

WEEK OF (TYPE THE DATES)

CASE MANAGER

THE ONE THING THIS WEEK

BLOCK	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Date					
Morning					
Midday					
Afternoon					

Must do this week (from the list on page 9, meetings first)

Waiting on (who, what, since when)

Meeting Prep Week View

For a week with meetings. One row per meeting: date and time, student, what to bring, who to remind, done. The agenda and notes pages live in the binder; this is the prep.

WEEK OF (TYPE THE DATES)

CASE MANAGER

MEETINGS THIS WEEK (COUNT)

DATE / TIME	STUDENT	MEETING (KIND, WHERE)	WHAT TO BRING	WHO TO REMIND (FAMILY, TEACHERS, PROVIDERS)	DONE

What to bring, every time

- ☐ The data since the last meeting, in the words the goal uses
- ☐ The draft, if there is one, and the prior plan
- ☐ The parent input that came back, and the interpreter arranged if needed
- ☐ The room booked, the sign-in page from the binder printed

Who still has not confirmed, and who is calling them

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WEEK Data Collection Week View

Twelve students down, Monday to Friday across. Which sheet each student is on this week and a tick when the data was taken. A blank cell on Friday is next week's first job.

WHO TAKES THE DATA (INITIALS)

[illegible]

A tick, an initial, or a dash

A tick means the sheet was filled that day; an initial means someone else took it; a dash means no session was scheduled. A blank is the thing that did not happen. The sheet column names the data sheet from the group plan (13).

Sheets that were not taken this week, and why

EXAMPLE

One Week in October, Filled In

Ms. Ortiz and her six students are invented, and so is every date. The deadlines list for October and the week of the 13th copied off it on Sunday; every meeting on the list that week is on the plan.

Deadlines and meetings list (page 9) — October, Ms. Ortiz, six students (all invented)

DATE	STUDENT	WHAT IS DUE, OR WHAT THE MEETING IS	KIND	DONE
Oct 3	Cora	Progress report, period 1, sent home	PR	X
Oct 8	Dev	Data pull for the November IEP	IEP	X
Oct 14	Ben	Annual review, 3:15, conference room	mtg	—
Oct 15	Ava	Progress report, period 1, sent home	PR	—
Oct 16	Elena	Parent conference, 8:00, Room 12	mtg	—
Oct 17	Dev	Draft IEP to the team for comment	IEP	—
Oct 22	Finn	Evaluation consent: follow-up call if not back	eval	—
Oct 24	Finn	Re-evaluation planning meeting, 2:30	mtg	—
Oct 29	Ava	Testing accommodations confirmed with the coordinator	other	—

9 rows this month, 2 already ticked. The bold rows are the week of Oct 13: 4 items, 2 of them meetings. The month has 3 meetings in all; the third is the week after.

Weekly plan (page 10) — week of Oct 13, copied off the list on Sunday

BLOCK	MON OCT 13	TUE OCT 14	WED OCT 15	THU OCT 16	FRI OCT 17
Morning	8:30 Reading group: Ava, Cora, Finn 9:30 Math 1:1: Dev	8:30 Reading group: Ava, Cora, Finn 9:30 Math 1:1: Dev	8:30 Reading group: Ava, Cora, Finn 9:30 Math 1:1: Dev	8:00 Parent conference: Elena (Rm 12) 9:30 Math 1:1: Dev	8:30 Reading group: Ava, Cora, Finn 9:30 Math 1:1: Dev
Midday	11:00 Push-in science: Ben, Elena Lunch duty	11:00 Push-in science: Ben, Elena 12:00 Print Ben's sign-in page	11:00 Push-in science: Ben, Elena Ava's progress report home today	11:00 Push-in science: Ben, Elena Planning: Dev's draft, last read	11:00 Push-in science: Ben, Elena Friday: quick log (17) copied to the binder
Afternoon	1:00 Writing group: Ava, Ben 2:15 Ben's draft read once more	1:00 Writing group: Ava, Ben 3:15 Annual review: Ben (conf. room)	1:00 Writing group: Ava, Ben 2:15 Data week (15) ticked through Wed	1:00 Writing group: Ava, Ben 2:30 Dev's draft to the team	1:00 Writing group: Ava, Ben 2:30 Next week's rows from the list (9)

Must do this week

- ☐ Ben's annual review Tue 3:15: data, draft, sign-in page, interpreter confirmed
- ☐ Elena's parent conference Thu 8:00: work samples, the reading graph
- ☐ Ava's progress report home Wed; Dev's draft to the team Fri
- ☐ Three from the to-do page: Finn's consent envelope, para schedule reprint, order the timers

Waiting on

- ☐ Finn's evaluation consent (sent Oct 6; call Oct 22 if not back)
- ☐ Gen-ed math teacher: Dev's work samples for the draft (asked Oct 9)
- ☐ Office: conference room for Oct 24, 2:30 (asked Oct 10)

Ben's annual review and Elena's conference are the 2 meetings on the list that week, and both sit in their day's block with a time. Ava's progress report and Dev's draft are the other 2 dated items, and they are there too. The reading group did not run Thursday morning because the conference is in that block; that is what the plan is for.