

Twice-Exceptional Progress Monitoring

SECTION 1 · SET UP THE CASE FILE 2E PROGRESS MONITORING

PROFILE Dual Profile Card — Strengths and Challenges

The strength cluster and the challenge cluster, side by side, so neither one gets lost behind the other.

STUDENT **GRADE** **UPDATED**

STRENGTH CLUSTER — ADVANCED ABILITY OR GIFTED DOMAIN

AREA OF ADVANCED ABILITY (AS YOUR TEAM NAMES IT)

EVIDENCE AND ITS SOURCE (ASSESSMENT, WORK SAMPLE, OBSERVATION, DATE)

HOW IT IS CURRENTLY ENRICHED OR ACCELERATED

ADULTS WHO SEE THIS MOST OFTEN

CHALLENGE CLUSTER — IDENTIFIED AREA OF NEED

AREA OF IDENTIFIED NEED (AS YOUR TEAM NAMES IT)

EVIDENCE AND ITS SOURCE (ASSESSMENT, WORK SAMPLE, OBSERVATION, DATE)

ACCOMMODATION OR SUPPORT CURRENTLY IN PLACE

ADULTS WHO SEE THIS MOST OFTEN

WHERE THE TWO CLUSTERS INTERACT

WHERE THE STRENGTH OFFSETS THE CHALLENGE

WHERE EITHER CAN HIDE THE OTHER

SOURCES THIS PROFILE DRAWS FROM (CHECK WHAT APPLIES)

- ☐ A formal assessment or evaluation report (name it and date it below)
- ☐ Classroom work samples or a portfolio
- ☐ Structured observation, by whom
- ☐ Family input or a family interview
- ☐ Student input, in the student's own words
- ☐ A prior IEP, 504 plan, or gifted service plan

NAMED AND DATED HERE

READ BEFORE FILLING THIS IN

This file does not determine whether a student is gifted or whether a student qualifies for a disability label — both are your team's own determination, made on your district's own paperwork and criteria. Every mark, rating and word on these pages is the team's own data entry, entered after that determination, never a scoring instrument that makes it.

Twice-Exceptional (2e) Progress Monitoring Data Sheets Editable Page 7 of 24 + BRIGHT PATH SPED

SHARE 2E PROGRESS MONITORING

Summary — Both Clusters

separately, then one line on how they interacted this quarter. Nothing here averages a strength into a single number.

REPORTING PERIOD **WRITTEN BY / DATE**

LEVEL	TARGET	CHALLENGE CLUSTER GOAL (SHORT)
		BASELINE CURRENT LEVEL CRITERION
		STATUS (MASTERED / SUFFICIENT PROGRESS / INSUFFICIENT PROGRESS / NOT YET ADDRESSED)

CTED THIS QUARTER

what the other needed? Write it in one or two sentences, each with a

WHAT CHANGES NEXT PERIOD, IN EITHER CLUSTER

Stable Page 19 of 24 + BRIGHT PATH SPED

What Is Inside, and Where

24 pages: three sections and a worked example. Nothing here decides whether a student is gifted or eligible for a disability label; every one of those calls stays with your team.

01 Set Up the Case File

PAGES 4–9

 Start Here — Three Steps START HERE 4	 Binder Cover and Divider Labels SETUP 6	 Dual Profile Card — Strengths and Challenges PROFILE 7
 School-Context Profile PROFILE 8	 Which Tracker Matches Which Goal SETUP 9	

02 Track Both Clusters

PAGES 11–16

 Strength-Area Goal Tracker SETUP 11	 Strength-Area Data Log DATA 12	 Challenge-Area Goal Tracker SETUP 13
 Challenge-Area Data Log DATA 14	 Quick Daily Dual Check-In DATA 15	 2e Caseload Roster CASELOAD 16

03 Report and Share

PAGES 18–23

 Dual-Cluster Progress Graph TRACKER 18	 Quarterly Summary — Both Clusters REPORT 19	 General Education Classroom Observation Form DATA 20
 Family Update — Strengths and Challenges REPORT 21	 Observable-Language Phrase Bank REFERENCE 22	 Goal Trackers and Summary, Filled In EXAMPLE 23

WHAT THE PAGE TAGS MEAN

Setup	Fill once, from the team's own records — a goal, a profile, or a chooser.	Tracker	Where a weekly number turns into a trend line.
Data	A log filled in every session or every day.	Report	A quarterly summary or a family update, ready to send.
Profile	The dual profile and school-context pages.	Reference	The phrase bank — nothing here is filled in per student.
Caseload	The whole caseload on one page.	Example	The invented worked example, at the end of the file.

Start Here — Three Steps

Ninety seconds of reading before the first entry. The two clusters stay on their own pages start to finish.



1

Set up the case file once

Print the binder cover and divider labels (page 6) for the student. Fill the Dual Profile Card and the School-Context Profile once, from the team's own records.

Use the chooser (page 9) to match each of the student's goals to a strength-cluster or challenge-cluster tracker.



2

Track both clusters as the term runs

Log the strength cluster on its own data log and the challenge cluster on its own — the two never share a row, so neither one is read into the other.

Short on time some weeks? The quick dual check-in (page 15) covers both clusters on one page in about two minutes a day.



3

Roll up and share

Plot both lines on the graph (page 18) and write the quarterly summary (page 19) from it.

The family update (page 21) and the classroom observation form (page 20) are ready to send as soon as the logs are filled — no separate write-up.

WHAT THIS FILE IS

A fillable PDF. The fields are built into the document itself, so it works offline with no account or subscription and looks the same on every machine that opens it.

WHAT THIS FILE IS NOT

It is not a Google Sheets file, a Google Doc, or an Excel workbook, and it does not calculate a rating or plot a point for you. You can type in it and print it; you cannot drag the boxes around or restyle the page.

THE RULE EVERY PAGE IN THIS FILE FOLLOWS

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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.

A cell will not take a rating and a note. Use the evidence column next to it; the rating is meant to be short.

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.

WHY TWO DATA LOGS INSTEAD OF ONE

A shared log tends to quietly become whichever cluster the adult in the room is more comfortable talking about. Two logs keep both clusters visible on their own terms, all year.

FIRST TIME THROUGH THE FILE

1. Binder and tabs (page 6).
2. Profile pages (pages 7–8), from the team's own records.
3. One goal tracker per cluster (pages 11 and 13).
4. Graph, quarterly summary, family note, once data exists.

PROFILE

Dual Profile Card — Strengths and Challenges

The strength cluster and the challenge cluster, side by side, so neither one gets lost behind the other.

STUDENT

GRADE

UPDATED

STRENGTH CLUSTER — ADVANCED ABILITY OR GIFTED DOMAIN

AREA OF ADVANCED ABILITY (AS YOUR TEAM NAMES IT)

EVIDENCE AND ITS SOURCE (ASSESSMENT, WORK SAMPLE, OBSERVATION, DATE)

HOW IT IS CURRENTLY ENRICHED OR ACCELERATED

ADULTS WHO SEE THIS MOST OFTEN

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02

Track Both Clusters

A goal tracker and a data log for the strength cluster, a goal tracker and a data log for the challenge cluster, a two-minute check-in that covers both in one sitting, and a whole-caseload roster.

IN THIS SECTION

Strength-Area Goal Tracker	11
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Challenge-Area Data Log	14
Quick Daily Dual Check-In	15
2e Caseload Roster	16



REPORT

Quarterly Summary – Both Clusters

Two clusters, reported separately, then one line on how they interacted this quarter. Nothing here averages a strength score and a challenge score into a single number.

STUDENT

REPORTING PERIOD

WRITTEN BY / DATE

STRENGTH CLUSTER

GOAL (SHORT)

BASELINE

CURRENT LEVEL

TARGET

STATUS (MAINTAINED / ADVANCING / PLATEAUED / NOT YET ADDRESSED)

CHALLENGE CLUSTER

GOAL (SHORT)

BASELINE

CURRENT LEVEL

CRITERION

STATUS (MASTERED / SUFFICIENT PROGRESS / INSUFFICIENT PROGRESS / NOT YET ADDRESSED)

HOW THE TWO CLUSTERS INTERACTED THIS QUARTER

Did progress in one cluster change what the other needed? Write it in one or two sentences, each with a number and a date.

ATTENDING THIS MEETING

WHAT CHANGES NEXT PERIOD, IN EITHER CLUSTER

REPORT

Family Update — Strengths and Challenges

Goes home once a month, ready to send as printed or typed. No ratings, no scores — the data logs already have those.

STUDENT	DATE	FROM

WHAT WE ARE BUILDING ON (STRENGTH CLUSTER)
In plain words, no ratings or scores.

WHAT WE ARE SUPPORTING (CHALLENGE CLUSTER)
In plain words, no scores.

HOW THE TWO CONNECT THIS MONTH

ONE WAY TO NURTURE THE STRENGTH AT HOME

ONE WAY TO SUPPORT THE CHALLENGE AT HOME

A QUESTION FOR YOU

QUESTIONS? BEST WAY TO REACH ME	SIGNATURE (FAMILY), IF YOUR SCHOOL ASKS FOR IT

 **EXAMPLE**

Goal Trackers and Summary, Filled In

 **SAMPLE · INVENTED STUDENT**

Simone is invented, and so is every mark on this page. Every number in the quarterly note below can be re-counted from the rows above it.

STRENGTH-AREA GOAL TRACKER — SIMONE T., GRADE 6 (INVENTED)

ADVANCED-ABILITY AREA
Reading comprehension and verbal reasoning

BASELINE
Reads and discusses grade 9-level text independently (Fall benchmark, Aug 28)

TARGET
Sustains discussion-level engagement in a weekly advanced text circle through the year, with one independent project each quarter

MEASURED AS
Facilitator engagement rating 1–5 per session, plus a project count

CHALLENGE-AREA GOAL TRACKER — SIMONE T. (INVENTED)

AREA OF NEED
Written expression — organizing a multi-step writing task

BASELINE
1 of 5 process steps (brainstorm, outline, draft, revise, edit) completed independently, Aug 28

CRITERION
4 of 5 process steps completed independently on 3 consecutive assignments

MEASURED AS
Steps independent out of 5, per assignment

DATE	ACTIVITY	ENGAGEMENT (1–5)
Sept 4	Text circle — grade 10 short story	4
Sept 11	Text circle — grade 10 short story	5
Sept 18	Independent project: poetry anthology analysis	4
Sept 25	Text circle — grade 11 essay excerpt	5
Oct 2	Text circle — grade 11 essay excerpt	5

Average engagement across the 5 logged sessions is 4.6 of 5 (4+5+4+5+5 = 23, divided by 5 sessions). One independent project completed. Status: advancing.

DATE	SESSION / TASK	STEPS INDEPENDENT (OF 5)	SUPPORT LEVEL USED
Aug 28	Personal narrative draft	1	Model + verbal prompt each step
Sept 11	Compare/contrast paragraph	1	Model + verbal prompt each step
Sept 25	Opinion paragraph	2	Verbal prompt on 3 steps
Oct 9	How-to paragraph	3	Verbal prompt on 2 steps
Oct 23	Persuasive paragraph	4	Verbal prompt on 1 step

Independent steps rose from 1 of 5 (Aug 28) to 4 of 5 (Oct 23), a gain of 3 of 5 steps across the 5 logged sessions. The criterion (4 of 5) was met once; two more assignments at 4 of 5 or better close the goal. Status: sufficient progress.

QUARTERLY SUMMARY SENTENCE, BOTH CLUSTERS

Strength cluster: average engagement 4.6 of 5 across 5 sessions, with 1 independent project completed. Challenge cluster: independent steps rose from 1 of 5 to 4 of 5 across 5 sessions, a gain of 3 of 5. This quarter, scheduling the writing task right after the text circle corresponded with the two highest-support sessions; moving it to the morning is the change noted on the tracker for next quarter.

Every number above can be re-counted from the two tables on this page.