
Appendix B

Initial Case Management Meeting Template, Facilitator's Script,
and Follow-Up Case Management Meeting Template

B1: Initial Student Case Management Meeting Template

Can be adapted for district, network, diocese, or school use

Articulate Agreed-Upon Operating Norms: _____

Student's Name: _____

Grade: _____ **Date:** _____

Teacher's Name: _____

Focus of Teacher's Request for Support: _____

Student's Background Information:
Interests:
Strengths:
Identifications/Accommodations/Modifications:

Other Important Learning Info:

Observation:

Background Info (Understanding of Learning Intentions and Success Criteria; teacher observations, assessments administered):

Analysis of current work sample:

What are the strengths of this student?	What are the areas of need for this student?

Which area is critical to this student's growth and achievement?

How can we build on this student's strengths?

What instructional approaches/strategies has teacher already tried?

Plan:

What is a reasonable next short-term goal for this student? Why?

What instruction approaches/strategies will you try and WHY do you think they will work?

Strategy/Rationale	Modeled	Shared	Guided	Independent	Application

Group suggests various approaches/strategies not tried using above grid

Teacher selects one from above and determines how long it will take to use the strategy with student before determining if successful or not.

What resources would you need to implement this plan?

Evidence and Follow Up:

What kind of work samples from this student will you bring to the next meeting?

Next Meeting Date:

THINK ABOUT: What other instructional practices from our Responsive Literacy Program might this student respond to?				
READING				
MODELED ☐ Read-Aloud ☐ Think-Aloud ☐ Different Genre/Reading ☐ Whole Class ☐ Broaden Interests ☐ Thinking and Problem Solving ☐ Student Engagement/Motivate ☐ Students Develop Appreciations	SHARED ☐ Book Talks ☐ Story Theatre ☐ Reader's Theater ☐ Paired Reading ☐ Choral Reading/Speaking ☐ Whole Class (same reading material) ☐ Build Skills and Strategies ☐ Framing Questions ☐ Student Engagement/Motivation	GUIDED ☐ Instructional Level Reading ☐ Focus: Comprehension ☐ Before Reading ☐ During Reading ☐ After Reading ☐ Small Flexible Groups ☐ Groups Based on Needs ☐ Reinforce Strategies Taught	INDEPENDENT ☐ Self-Selected ☐ Literature Circle ☐ Reading Workshop ☐ Conferencing ☐ Buddy/Partner Reading ☐ Book Club ☐ Pursue Areas of Interest ☐ Books Easily Accessible ☐ Diversity	APPLICATION ✓ Can read other texts of increasing difficulty ✓ Can read other genre with fluency and comprehension ✓ Can read and interpret accurately other subject area texts, information
WRITING				
MODELED ☐ Teacher Write-Aloud ☐ Show process in mini lesson ☐ Thinking/ ☐ Problem Solving ☐ Whole Class ☐ FOCUS (week, month, term) ☐ Use of Resources	SHARED ☐ Teacher and students write story together with the teacher as scribe ☐ Students share the pen to complete a story after talking about a shared event	GUIDED ☐ Focused Mini-Lessons ☐ Small Flexible Groups (needs) ☐ Reinforce Strategies Taught ☐ Groups Based on Needs	INDEPENDENT ☐ Journal ☐ Constructed Response ☐ Writing Workshop ☐ Conferencing ☐ Process Writing ☐ Flexibility of Topic ☐ Pursuit of Interests	APPLICATION ✓ Can write using a variety of genres for a variety of purposes in every subject area ✓ Can co-construct Bump-It-Up Walls with teacher and peers

THINK ABOUT:

Application of the GRR Model above

DECONSTRUCTED LEARNING INTENTIONS

CO-CONSTRUCTED SUCCESS CRITERIA

DIAGNOSTIC, FORMATIVE, and/or SUMMATIVE ASSESSMENT

DESCRIPTIVE FEEDBACK

PEER- AND SELF-ASSESSMENT

INDIVIDUAL GOAL-SETTING

CO-CONSTRUCTED ANCHOR CHARTS

EXEMPLARS

RICH TASKS

OTHER

Source: Adapted from York Region District School Board (2011).

B2: Facilitator's/Chair's Script for System Case Management Meeting

Can be adapted for district, network, diocese, school, or student levels

Date: _____ **Time (30 minutes max)** _____

Recorder: _____

School & "The Presenter": _____

Members Present: _____

NORMS:

Before we start I would like to **remind** you of the **Norms**:

- attentive listening
- hear every voice
- open to new ideas
- ego-free leadership
- equal participation
- learn together & build confidence in each other's ability

INTRODUCE SCHOOL/STUDENT:

_____ can you introduce the school/student to us by telling us a little bit of the background information that you think will help us understand this school's/student's under/slow (etc.) performance.

INTRODUCE PERFORMANCE EVIDENCE:

_____ as "the presenter" is now going to give us the **background on the data/evidence that we are going to be analyzing**. _____ will then articulate what help s/he is seeking.

OBSERVATION:

Now we are going to take a little bit of time to **individually review** this evidence on our own/in pairs and make notes. We are now in the **OBSERVATION PHASE** where we are going to talk about the **strengths** that we see in this evidence. **What is the student/school doing well?** Thank you for pointing out those strengths. What area(s) can we suggest to build on? Go around the table and "the presenter" listens. Group may ask "the presenter" clarifying questions.

ANALYSIS PHASE:

Now we are going to the **ANALYSIS PHASE** where we are going to **brainstorm the things that are missing** from this evidence that would make it a high-achieving school/student. Hear each voice around the table and “the presenter” listens.

PLAN PHASE:

We have a list of things that we are going to target with this school/student. What we need to do now in the **PLAN PHASE** is **decide, together, which one specific area/strategy** that “the presenter,” with the Principal and leadership team, is going to target **first** to help the school/student improve.

FEEDBACK PHASE:

Now we are going to move on to the **FEEDBACK PHASE**. In the observation phase, we brainstormed some strong positive feedback that you can share with the Principal and school staff or classroom teacher. Review the next level of work/one strategy needed at this school or in this classroom that “the presenter” will communicate, and clarify “how” to do that. Elicit the Learning Intention and Success Criteria to be reported back at next meeting of this forum. Clarify how the Principal and Leadership Team or teacher will communicate the improvement strategy to the school staff members/parents ensuring that we are building on their strengths. What evidence of improvement will be brought back to this table? How will this table support “the presenter” in the meantime (as we all own the improvement of all schools)?

The next meeting will be _____

Who will attend _____

Actions to be taken _____

What evidence of improvement (or not) will be presented?

B3: Case Management Follow-Up Meeting Template

Review co-constructed Operating Norms before meeting begins.

Student's Name: _____

Grade: _____ Date: _____

Teacher's Name: _____

ACHIEVEMENT STANDARD

Learning Intention:

Success Criteria:

Evidence Brought Forward From Previous Case Management (CM) Meeting

Hear teacher's voice as teacher presents the evidence.

Scrutiny of New Student Work Sample(s)

What teaching approaches and strategies have been used?

What can this student do?

What progress has this student made?

Plan

What is the short-term goal now for this student? Why?

Where do we need to provide ongoing support for this student?

What pedagogical strategies will you use next?

Modeled:

Shared:

Guided:

Independent:

Application:

Evidence and Follow-up

What are the Next Steps in support of this student?

If unsuccessful, what other approaches are recommended? What will be the evidence brought back to next meeting? We are not giving up!

How can we support you (the classroom teacher) until the next meeting?

Is there any external support that we all need?

Is there any current research that we all need to read?

If this case is successful, which other students in your class might benefit from this strategy? ("Necessary for some – good for all," says Lyn.)

On what date will we all return?