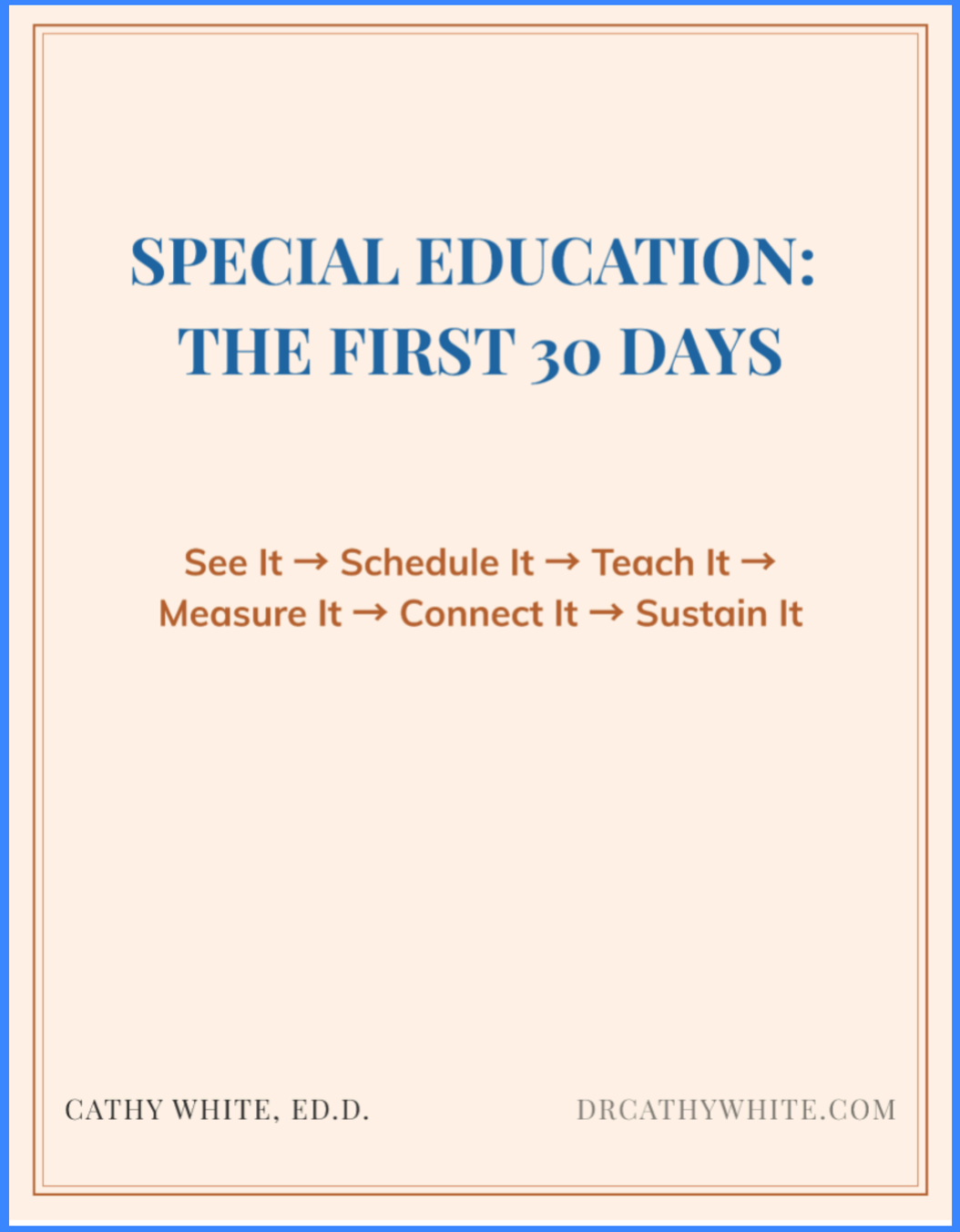


30 DAILY PLANS

14 FORMS

10-TAB SHEET

7 EMAIL TEMPLATES

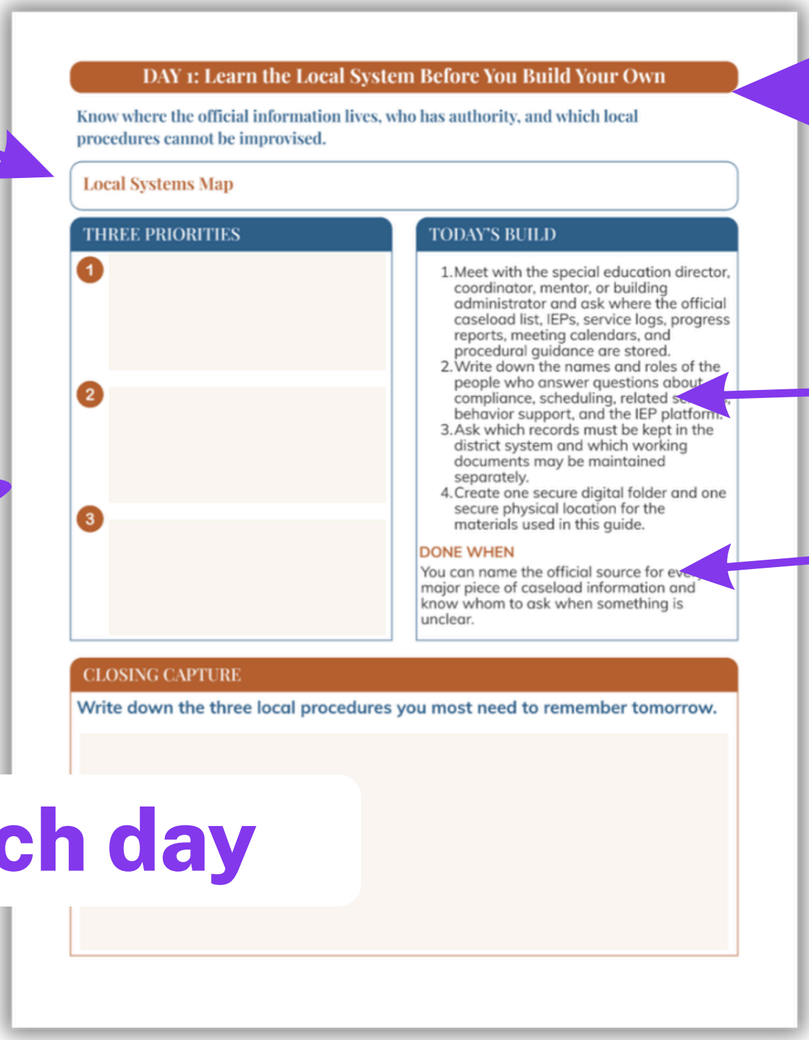
MENTOR GUIDE

TAKE MEANINGFUL & REALISTIC STEPS EACH DAY

Resources needed

Daily priorities

Close out each day



Daily goal

What to build each day

What "done" looks like

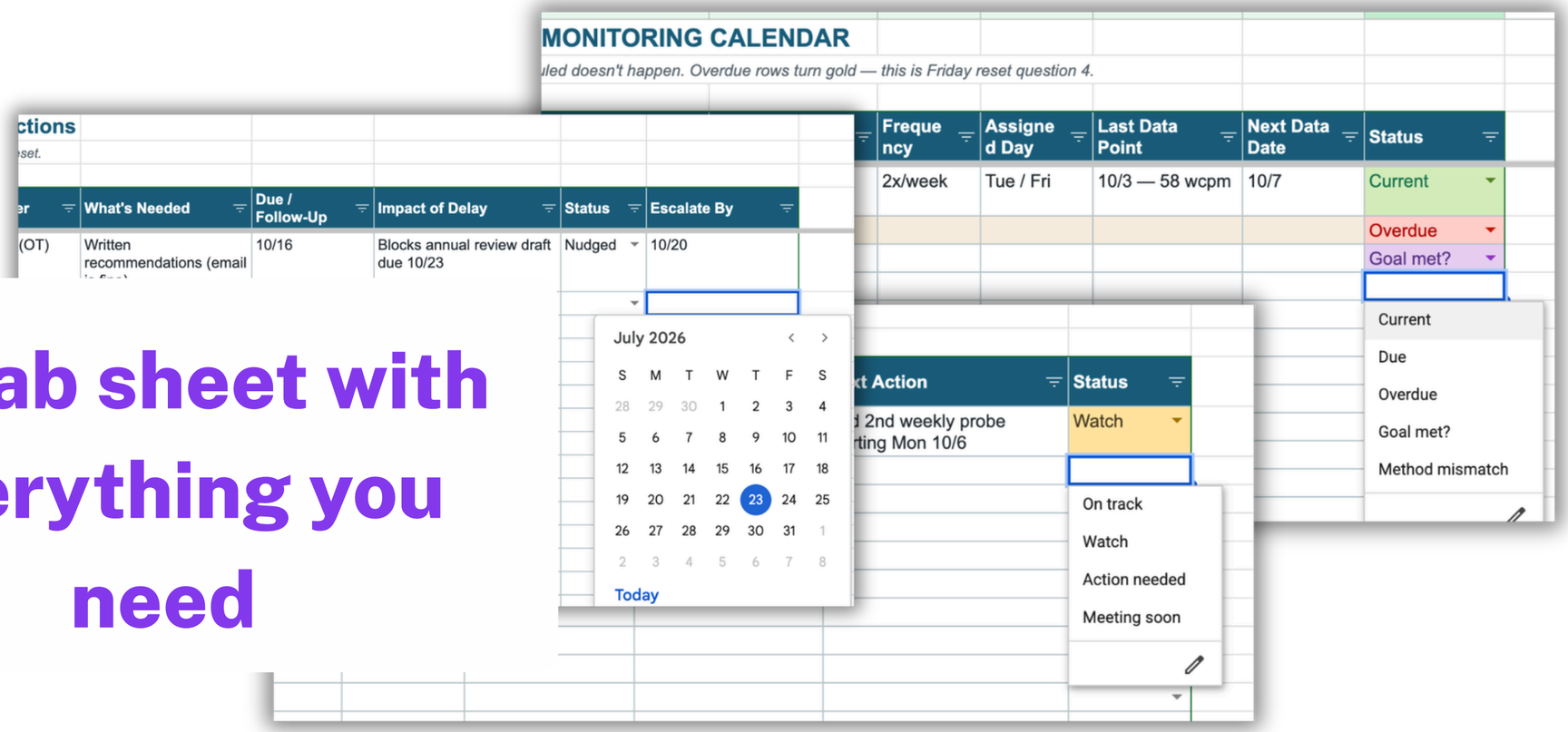
Write directly on Slide

*Slide background is not editable

BUILD YOUR FULL COMMAND CENTER PIECE-BY-PIECE

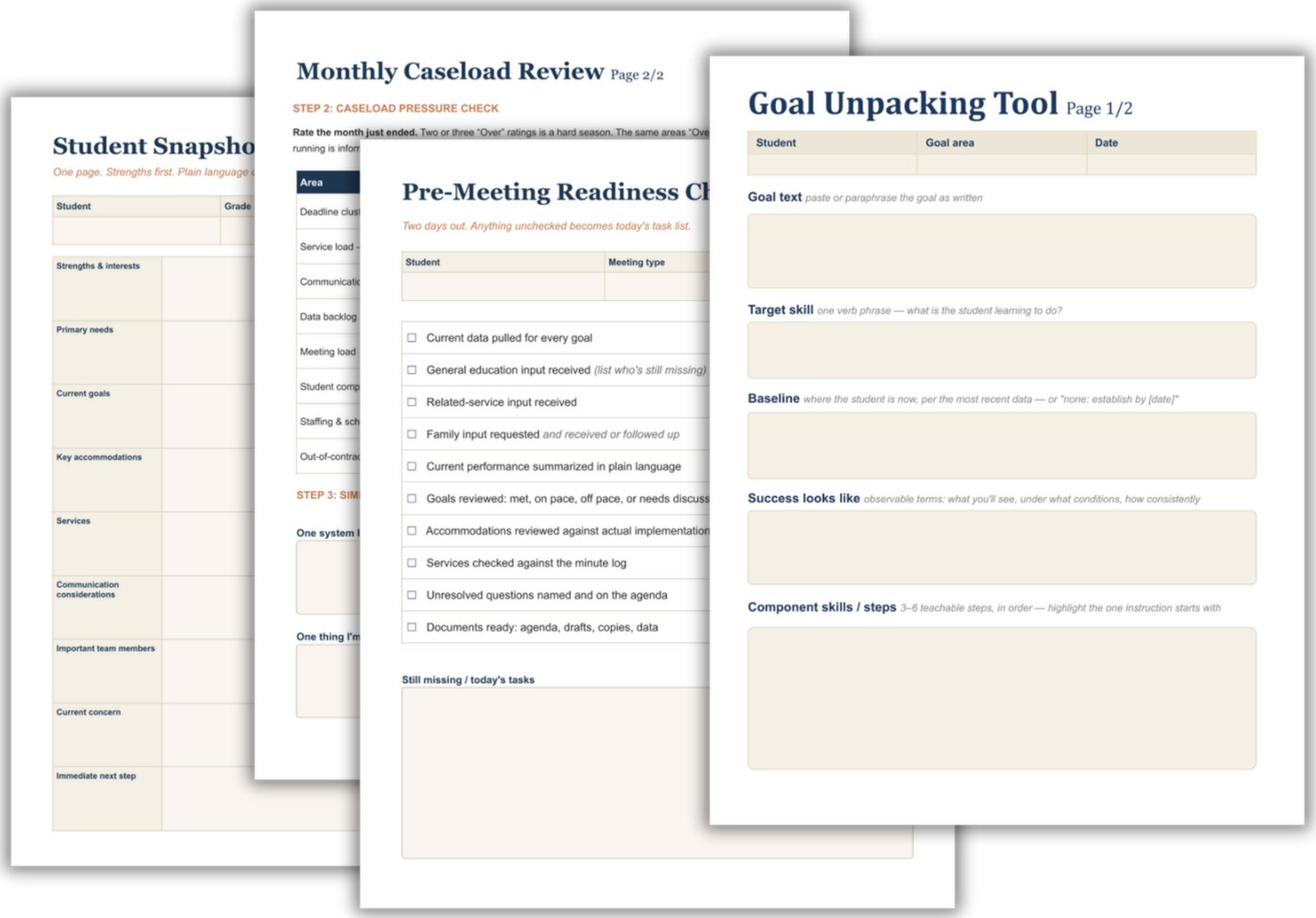
- Map
- Caseload Dashboard
- Follow-Through
- Weekly Service Schedule
- Service & Disruption Log
- Grouping Planner
- PM Calendar
- Communication Tracker
- Team Responsibility Matrix
- Accommodation Matrix

10-tab sheet with everything you need



Follow the guide to build 1 piece at a time = no overwhelm

FORMS FOR AN EFFECTIVE CASELOAD

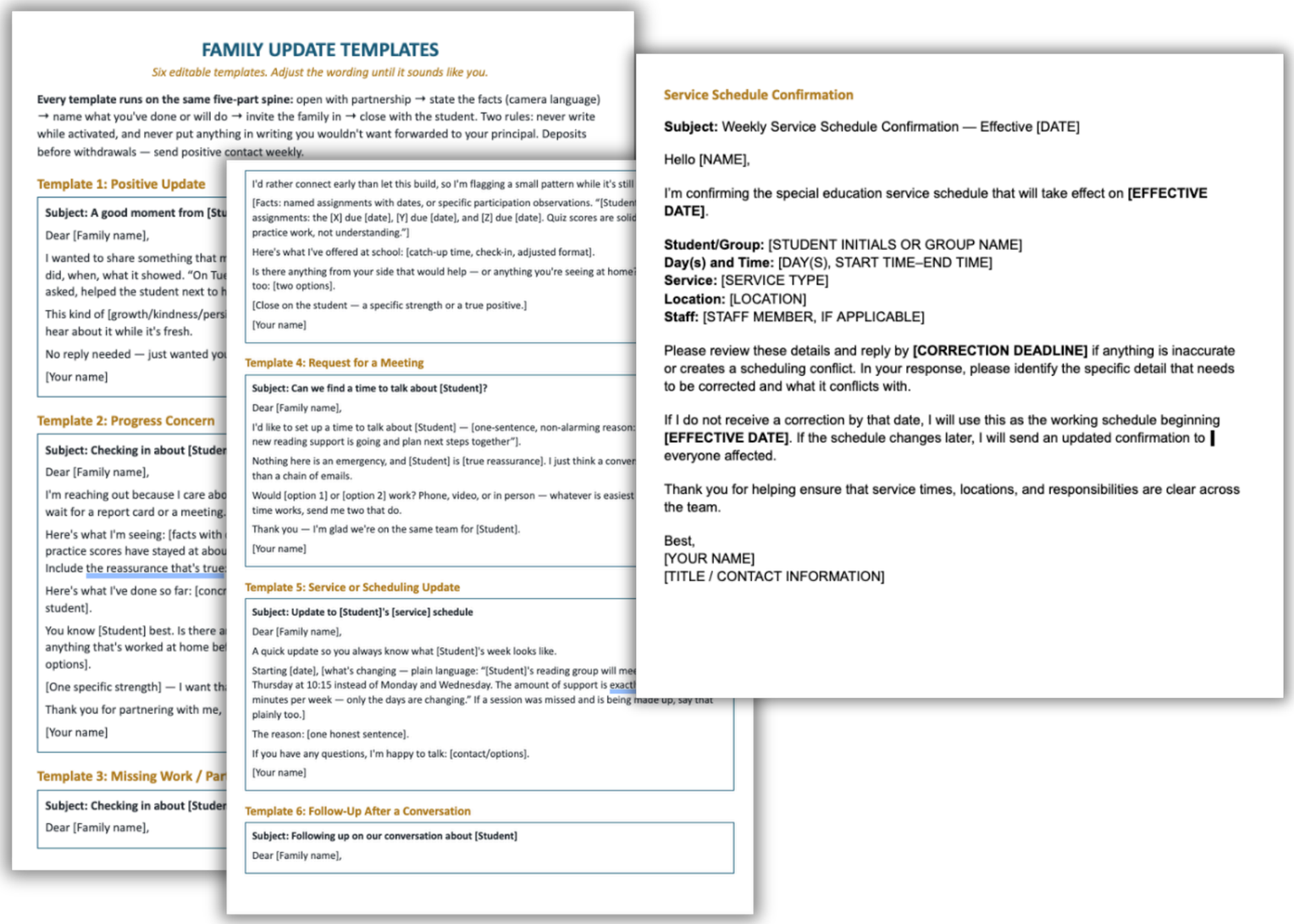


13 forms in Slides

1 Doc

All editable & aligned with daily guide

EMAIL TEMPLATES



FAMILY UPDATE TEMPLATES

Six editable templates. Adjust the wording until it sounds like you.

Every template runs on the same five-part spine: open with partnership → state the facts (camera language) → name what you've done or will do → invite the family in → close with the student. Two rules: never write while activated, and never put anything in writing you wouldn't want forwarded to your principal. Deposits before withdrawals — send positive contact weekly.

Template 1: Positive Update

Subject: A good moment from [Stu

Dear [Family name],

I wanted to share something that m
did, when, what it showed. "On Tue
asked, helped the student next to h

This kind of [growth/kindness/pers
hear about it while it's fresh.

No reply needed — just wanted yo

[Your name]

Template 2: Progress Concern

Subject: Checking in about [Studer

Dear [Family name],

I'm reaching out because I care abo
wait for a report card or a meeting.

Here's what I'm seeing: [facts with
practice scores have stayed at abou
Include the reassurance that's true

Here's what I've done so far: [concr
student].

You know [Student] best. Is there a
anything that's worked at home be
options].

[One specific strength] — I want th

Thank you for partnering with me,

[Your name]

Template 3: Missing Work / Par

Subject: Checking in about [Studer

Dear [Family name],

I'd rather connect early than let this build, so I'm flagging a small pattern while it's still

[Facts: named assignments with dates, or specific participation observations. "[Student
assignments: the [X] due [date], [Y] due [date], and [Z] due [date]. Quiz scores are solid
practice work, not understanding."]

Here's what I've offered at school: [catch-up time, check-in, adjusted format].

Is there anything from your side that would help — or anything you're seeing at home
too: [two options].

[Close on the student — a specific strength or a true positive.]

[Your name]

Template 4: Request for a Meeting

Subject: Can we find a time to talk about [Student]?

Dear [Family name],

I'd like to set up a time to talk about [Student] — [one-sentence, non-alarming reason:
new reading support is going and plan next steps together"].

Nothing here is an emergency, and [Student] is [true reassurance]. I just think a conver
than a chain of emails.

Would [option 1] or [option 2] work? Phone, video, or in person — whatever is easiest
time works, send me two that do.

Thank you — I'm glad we're on the same team for [Student].

[Your name]

Template 5: Service or Scheduling Update

Subject: Update to [Student]'s [service] schedule

Dear [Family name],

A quick update so you always know what [Student]'s week looks like.

Starting [date], [what's changing — plain language: "[Student]'s reading group will me
Thursday at 10:15 instead of Monday and Wednesday. The amount of support is exactl
minutes per week — only the days are changing." If a session was missed and is being made up, say that
plainly too.]

The reason: [one honest sentence].

If you have any questions, I'm happy to talk: [contact/options].

[Your name]

Template 6: Follow-Up After a Conversation

Subject: Following up on our conversation about [Student]

Dear [Family name],

Service Schedule Confirmation

Subject: Weekly Service Schedule Confirmation — Effective [DATE]

Hello [NAME],

I'm confirming the special education service schedule that will take effect on **[EFFECTIVE DATE]**.

Student/Group: [STUDENT INITIALS OR GROUP NAME]
Day(s) and Time: [DAY(S), START TIME–END TIME]
Service: [SERVICE TYPE]
Location: [LOCATION]
Staff: [STAFF MEMBER, IF APPLICABLE]

Please review these details and reply by **[CORRECTION DEADLINE]** if anything is inaccurate or creates a scheduling conflict. In your response, please identify the specific detail that needs to be corrected and what it conflicts with.

If I do not receive a correction by that date, I will use this as the working schedule beginning **[EFFECTIVE DATE]**. If the schedule changes later, I will send an updated confirmation to everyone affected.

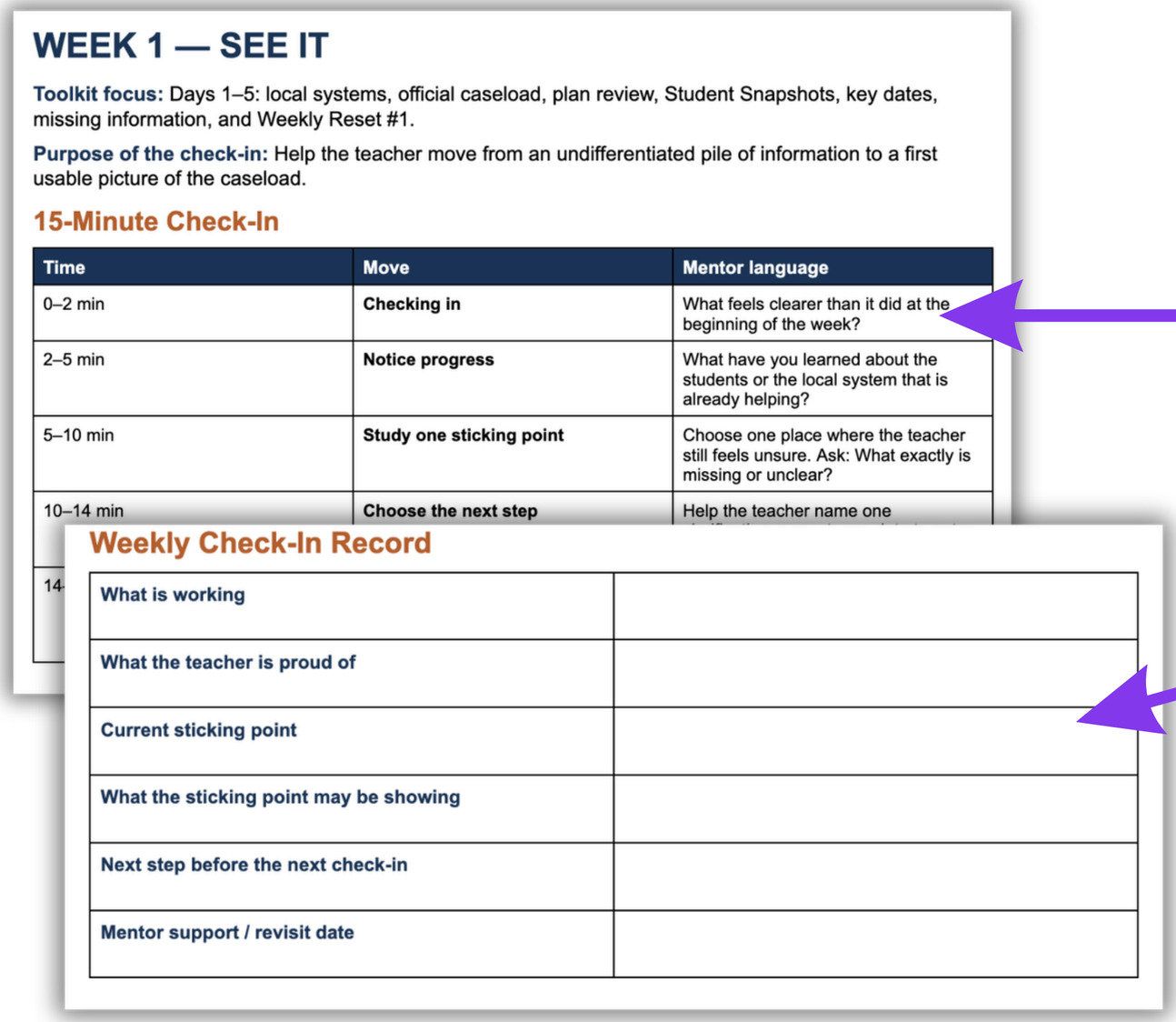
Thank you for helping ensure that service times, locations, and responsibilities are clear across the team.

Best,
[YOUR NAME]
[TITLE / CONTACT INFORMATION]

6 family email templates

Service time confirmation template

MENTOR GUIDE



WEEK 1 — SEE IT

Toolkit focus: Days 1–5: local systems, official caseload, plan review, Student Snapshots, key dates, missing information, and Weekly Reset #1.

Purpose of the check-in: Help the teacher move from an undifferentiated pile of information to a first usable picture of the caseload.

15-Minute Check-In

Time	Move	Mentor language
0–2 min	**Checking in**	What feels clearer than it did at the beginning of the week?
2–5 min	**Notice progress**	What have you learned about the students or the local system that is already helping?
5–10 min	**Study one sticking point**	Choose one place where the teacher still feels unsure. Ask: What exactly is missing or unclear?
10–14 min	**Choose the next step**	Help the teacher name one
14-		

Weekly Check-In Record

What is working	
What the teacher is proud of	
Current sticking point	
What the sticking point may be showing	
Next step before the next check-in	
Mentor support / revisit date	

15 minutes each week

Full plan for each meeting: questions, next steps & more

Notes record

Purchase is for 2 licenses. Share folder with mentor or 1 peer.



My name is Cathy White, Ed.D., and I'm the creator behind Pathwise Works. I've spent 25+ years in education, and I build frameworks and systems to help educators have **more time** to actually teach.

Work smarter, not harder!

PATHWISE WORKS

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