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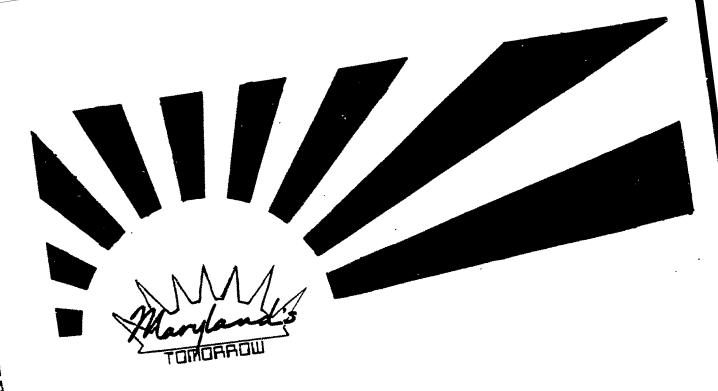
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ABSTRACT

Case management is an essential component of Maryland's Tomorrow projects. Case management is a client-centered, goal-oriented process for assessing the needs of an individual for particular services and assisting the client to obtain those services. Under Maryland's Tomorrow projects, a case manager develops a plan of service with an at-risk student, identifies the responsibilities of the student, and is responsible for finding and implementing all the resources needed to meet the training, education, support, and other needs of the student. Some of the actions required of case managers are as follows: (1) encourage parents to become involved in their children's education; (2) help students set realistic goals; (3) help students develop their own plan of action for achieving goals; (4) help students gain access to the services and resources they need to reach their goals; and (5) help students to gain access to services outside the school. The case management program can include techniques such as assessment, contracts, progress reports, weekly assignment sheets, and parental involvement. (Appendixes, which make up about two-thirds of the report, include forms for assessments, contracts, progress reports, weekly assignment sheets, and parental involvement derived from Maryland's Tommorrow projects.) (KC)

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Case Management In Maryland's Tomorrow

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Case Management In Maryland's Tomorrow

Marion W. Pines Project Director Maryland's Tomorrow

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October 1991



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William Donald Schaefer, Governor



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Case Management In Maryland's Tomorrow

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Case Management in Maryland's Tomorrow

Foreword

Case management is a requirement for Maryland's Tomorrow projects design. Case management was not operationally defined at the time Maryland's Tomorrow was initiated. Therefore, a study group of local practitioners was convened to define case management for the Maryland's Tomorrow program. This group identified services being provided by case managers; described what is being done to access services for students; what is being coordinated and with what agencies; and how case management is being monitored.

The content of this booklet draws heavily from the work group's discussion and the procedures which have been implemented across the state in various Maryland's Tomorrow programs. The work group included Nena Allevato, Governor Thomas Johnson High School, Frederick County; Deidra Bishop, Futures, Baltimore City Office of Employment Development; Nikki Coffman, Chesapeake High School, Baltimore County; B.J. Corbin, Lower Shore Private Industry Council; Joanne Fox and Sondra Mandell, Gaithersburg High School, Montgomery County; Debbie Urry, Easton High School, Talbot County; Mary E. Wagner, Glen Burnie High School, Anne Arundel County; Rosemary Bitzel and Walter E. Varner, Maryland State Department of Education. The work and contributions of each of these individuals are greatly appreciated.

Irene Penn
Branch Chief
Career and Employability Development Branch



What is Case Management?

Case management is not a new idea. It has long been a common tool in fields such as gerontology, mental health, and social work. But it has only recently begun to be applied in the field of education and youth employment. A growing challenge for individuals working with at-risk youth is how to access and manage the provision of services that students need to be successful. The challenge is to coordinate the education or training services, as well as coordinate with health, housing, public welfare and day care services. As the number of other services grows, so do the problems of determining service options, making successful referrals, and tracking student progress over extended periods of time.

In its "Guide to Case Management for At-Risk Youth," Brandeis University looks at case management activities at both the client level and the systems level. At the client level, case management is a client-centered, goal-oriented process for assessing the needs of an individual for particular services and assisting the client to obtain these services. Case management, based on this client-centered definition, uses a broker, the case manager, who works as a partner with at-risk youth to:

- identify and prioritize personal strengths and needs;
- encourage parent involvement
- help youth think out and set realistic, short and long-term goals;
- develop their own unique, logical plan of action for achieving goals;
- gain timely access to the unique array of services and resources needed to move toward their goals;
- successfully complete their customized set of services provided by a variety of institutions; and
- learn to access services on their own and thereby reduce dependency upon the case manager.

At the system level, case management is a strategy for coordinating the provision of services to clients within that system.

For a personalized or individualized client-centered strategy to be possible, the case management effort includes a concerted effort by a school, community, or a group of youth-serving agencies to work together as partners in a way that:

- ensures that services needed by young people are available when the young people need them;
- e empowers case managers to requisition services and resources across institutional lines;
- revises traditional modes of operation, referral procedures, capacity, and assessment methods if these modes do not work in the best interests of the young people they purport to serve.

Under Maryland's Tomorrow, a case manager is one who develops a plan of service with a student, identifies the responsibilities of the student and takes responsibility for marshalling all the resources needed to meet the training,



education, support, and other needs of the student. The most essential aspect of this process is to ensure that the case manager provides continuity of services from intake into the program to graduation and facilitates provision of services for one year after graduation to ensure successful entry into employment or entry into post-secondary education or training.

Who is The Case Manager?

Case management may be performed by someone who has teaching responsibility, a counselor or an advocate. In some cases, individuals work together as a case management team. In all cases, active planning, advocacy, marshalling of resources and monitoring of progress are the core tasks.

"The nature of the students in the Maryland's Tomorrow program requires that individual monitoring of attendance and academics is necessary on a day to day basis." Sondra Mandell, Maryland's Tomorrow Case Manager



- 3 -

Gase Management at the Student Level

Using the Brandeis University description of case management, the case manager works as a partner with at-risk students to:

Identify and prioritize personal strengths and needs

The case manager completes an initial assessment with the student prior to developing a plan of services. The assessment may include an interview, counseling, observing classroom or field trip behavior, checking student files, and a parent conference or a home visit. Included in the initial assessment may be information such as:

- student attendance
- individual education plans from middle school
- test scores
- employability skills assessments
- life skills
- social services information
- career related interests
- skills strengths

Using this information, the case manager will consider the student's need for services such as:

- advocacy
- mentoring
- counseling
- tutoring
- summer job placement
- specific career development activities

Encourage parents to become involved in their childrens' education

The invitation to parents to become involved begins at orientation meetings at the start of the program and, in some cases, during recruitment. The case manager outlines for parents and students the expectations, activities and requirements of the Maryland's Tomorrow program during a home visit, parent breakfast, evening meeting or individual conference. After orientation, regular communication and frequent invitations are the soil in which parent involvement may flourish. The case manager must also be prepared to intervene in cases of abuse, neglect, poor attendance, truancy and crisis situations. The case manager's communications, invitations and interventions with parents include:

- positive notes and phone calls home
- mid-term reports on academic progress
- signing contracts to improve grades, meet goals
- copies of progress reports and student schedules
- invitations to support student success in the program through attending parenting classes, parent support groups, reinforcing specific behavior
- referrals to family counseling or for financial



- 4 -

or medical assistancecrisis intervention, followed by referral.

Help students think out and set realistic short and long term goals

Once the initial assessment is complete, the case manager works with the student to develop short and long-term goals for the student's academic and personal life. The goals are linked to aspirations for the future after graduation. Often the student must raise personal expectations and consider career and occupational possibilities never imagined. The case manager's high expectations of the student inspire goals setting that is high, yet realistic. Some of the techniques case managers use are:

- counseling students
- modeling goal setting and attainment
- teaching time management
- teaching decision-making and conflict resolution
- organizing motivational opportunities for students such as educational, cultural and recreational field trips.

"We simply act as teacher-advocates, supporting and pushing our kids to reach their potentials." Nena Allevato

Help students develop their own logical plan of action for achieving goals.

Once the student has set short and long-term goals, a logical plan of action for achieving them is needed. The case manager helps the student to select the services and activities which will lead to the attainment of individualized goals. This plan of action reflects individual learning and support needs. Some of the means which the case manager and student use to develop a plan of action are:

- establishing learning goals related to career goals
- understanding how grades are configured
- modifying behavior which defeats attainment of goals
- organizing community service opportunities
- advising student about courses and vocational and work study programs.

"The support that case management provides is 60% of the strength of the Maryland's Tomorrow program. Otherwise, we would just be assigning students to classes." Debbie Urry

Help students gain access to the services and resources they need to reach their goals.

It is also important for case managers, program coordinators or advocates to be aware of services that exist within the local school or school system and to use them to full advantage. This could include access to services such as:

• a mentoring program



- group and individual counseling
- peer counseling
- appropriate assistance for passing functional tests
- a reading specialist
- computer-aided instruction
- special scheduling
- career education.

Effective case management does not fit into one service strategy, such as counseling, teaching, advocacy or coordination but overlaps several. The full range of support which the case manager organizes is determined by the needs of the individual student. The case manager does not just refer the student to services; they tailor them to the student's needs. The case manager also is the student's advocate in resolving problems and obtaining services. In order to do this, the case manager must:

- link with existing programs in the school
- establish business partnerships to recruit for mentors, incentive awards, and career exploration opportunities
- intervene with non-cooperating teachers
- intervene with problems that involve other school staff
- facilitate team building among school staff
- conduct a study skills class
- convene a group of teachers for team teaching.

"The most important aspect of our program is trying to meet the needs of the students so that the student can experience success." Nikki Coffman

Helps student to gain access to services outside the school and benefit from them.

It is sometimes necessary to refer students to outside agencies for problems which cannot be addressed in school. Once services have been identified, referred to, selected and acquired, the case manager monitors the service to ensure delivery. Periodic reviews of service delivery will assist the youth in reassessing planned services or to changing the service or provider to help students gain access to outside services. The case manager would:

- attend staff development and information and referral workshops to keep informed of community resources
- work with parents through meetings and telephone contacts to gain support for outside services in the home
- maintain contact with service providers to monitor student progress.

"The case manager should plan, coordinate, integrate and link \underline{all} services that relate to the at-risk youth. Wow! What a Job!" B.J. Corbin



Help students learn to access services on their own and thereby reduce dependency upon the case manager.

Assisting students to plan, to set goals and to undertake a process of reaching and completing goals, helps them to learn that they can make choices. They begin to see now their actions lead to outcomes. Case management in these instances empowers students to take control of their lives.



- / -

Planning Services Delivery and Monitoring Student Progress

Several Maryland's Tomorrow programs have developed and implemented techniques and formats to assist in case management. These techniques and formats have helped case managers monitor service delivery, provide information and feedback to other staff working with students and teachers in the program. When these techniques have been used, case managers have reported changes in attitudes relating to academic achievment. Some of these techniques are:

- 1. Assessment: The case manager assists in gaining information to plan services needed to help the youth be successful in school. The assessment process can be accomplished through a variety of techniques including interviewing, review of records, consultations with parents and teachers, using commercially as well as local designed tests, interest surveys, and aptitude assessments and by observing the youth in the classroom. Assessment should be accomplished over the life of the Maryland's Tomorrow program. Examples of locally designed assessment processes are included in Appendix A.
- 2. <u>Contracts:</u> Student contracts or agreements have been instituted in some programs based on the premise that students can be successful if they have self-discipline or management skills. With these skills students appear to have the strength and perseverance to pursue and achieve goals. Examples of student contracts or agreements are included in Appendix B. These examples include contracts among the student, parent, and teacher, peer support teams and contracts where incentives have been included if the student achieves outcome stated in the agreement.
- 3. Progress Reports: Students identified as underachievers often need a blend of services to support their academic achievement and achievement achievement and achievement achievement achievement and achievement. Appendix C has several examples of progress reports.
- 4. Weekly Assignment Sheets: Students are faced with deciding how to spend daily time in school, out of school, with their families, peers, personal time, time for schoolwork and assignments and extra curricular activities. Time management is essential if the student is to be successful. Assignment sheets are designed to cover weekly and monthly assignments, and ways to monitor marking periods have been developed to assist students in scheduling, studying for exams, and gaining control over their time. Appendix D has several formats created locally which have proven helpful to students.
- 5. <u>Parental Involvement:</u> Special efforts are necessary to involve parents in the education of their children. Approaches to linking the home and the school are essential to the case management process. Appendix E includes examples of these approaches.



APPENDIXES

<u>Assessments</u>	A
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Progress Reports	С
Maryland's Tomorrow Weekly Progress Report Maryland's Tomorrow Progress Report Maryland's Tomorrow Progress Report Staff Feedback Sheet Maryland's Tomorrow Students Cumulative Report	C1 C2 C3 C4 C5
Weekly Assignment Sheets	D
Maryland's Tomorrow Weekly Student Progress Grade Configuration Table for 9 Week Marking Period Maryland's Tomorrow Student Progress Report Assignment Sheets - Weekly Assignment Sheet The Monthly Calendar	D1 D2 D3 D4 D5
Parental Involvement	E
Student's Schedule with Parent Signature The Telephone Log	E1 E2



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PERSONAL EDUCATIONAL PLAN

Student's Name

Planning For My Success

MARYLAND'S TOMORROW/SUCCESS



Enrollment Date: _____

End Date: _____

Prince George's County



Student Name	
Last First	(END OF YEAR LABELS)
Parent Name	
Street Address	
City,State,Zip Code	
Student I.D.#	
Student D.O.B.	
Race SSN	
Sex	
Telephone(h) (w)	
ENROLLMENT CRITERIA	
CTBS	
Total Rdg	
Total Math	
Pre Functional Test Results 7th Grade	
Math Reading	
Other Test Scores:	
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Days Absent	
Attendance:	
School year - 7th School year - 8th	
Suspensions:	
School year - 7th	
School year - 8th	FINAL GPA
Discipline Referrals 0 1 2 3 4 or more	School year - 7th
Previous Placements Indications:	School year - <u>8th</u>
YES NO Explain	
	



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	1st Year
	2nd Year
	3rd Year
	4th Year
	5th Year
College	Career 1st Year
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	2nd Year
	3rd Year
	4th Year
	5th Year



Student	
Parent(s)	Phone
	Home
	Work
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Positive plan of action	Positive plan of action
Conference suggestions date	Conference suggestions date
Positive plan of action	Positive plan of action
Conference suggestions date	Conference suggestions date
Positive plan of action	Positive plan of action
Conference suggestions date	Conference suggestions
Positive plan of action	Positive plan of action



TO BE COMPLETED BY ADVOCATE WITH ENTRY INTO FUTURES. REVISIT AS NECESSARY FOR INFORMATION UPDATE.

FUTURES STUDENT PROFILE

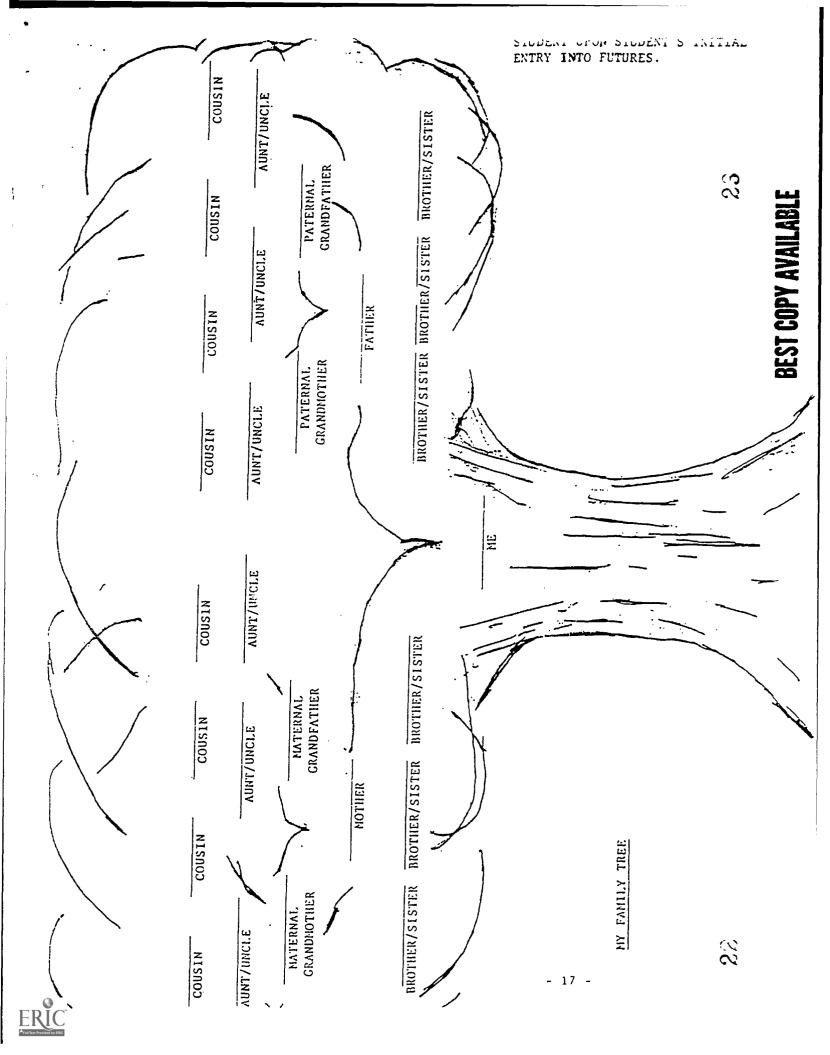
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Address/Zip (if different):		
Phone (if different):		
Employment Address/Zip/Phone:		
Father's Name:		
Address/Zip (if different):		
Phone (if different):		
Employment Address/Zip/Phone:		
Emergency Contact:		
(name and phone)		
Others Living in Home:	Relationship	
Name/Age/Sex	to Student_	School or Employment
FUTURES Sta	ff Signature:	



STUDENT INFORMATION

Student's Name:	Date:
Three hobbies or special interests:	
Student's favorite school subject(s):	
Does student plan on attending college?	
Student's career goals:	
Comments or other information: ANTICIPATED SE (Use to develop goal)	
Attendance	Medical Services
Academics/Grades	Mentoring
Career Counseling	Personal Counseling
Employability Skills	Social Services Info.
Financial Assistance	Parent Conference
Job Placement Service	Tutoring
Advocacy & Legal Services	Transportation
Other, please define:	





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FUTURES GOAL STATMENTS

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FUTURES REFERRAL FORM

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Student's Name:		
Referral Agency Name/Address/Zip:		
Referral Contact Name/Phone:		
Referred By:		
Referral Reason:		
:		
FUTURES Staff Signature:		
/		





REPORT CARD CONTRACT

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HIGH SCHOOL	., DO HEREBY	CONTRACT FOR TE	E FOLLOWING GRADES	ON MY REPOR	T CARD.
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WILL BE PROVIDED
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SIGNATURE OF 10TH GRADE STUDE
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Peer Support Team Goal Sheet and Incentive Contract
This goal setting format is designed for a peer group
or team of two students who will work together to
achieve a goal. The student determines when the goal
has been achieved through feedback from the teacher
and administrator. This contract also has a space
for an incentive prize to be recorded on the form.
This format also links the freshman with a sophomore
and the Maryland's Tomorrow staff.

MONTGOMERY COUNTY



MARYLAND'S TOMORROW INCENTIVE PROGRAM

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when the	e above contract is	fulfilled by the end o	of the marking period.
Mid-Mark	cing Period Reward=		Other Gift Certificate
	*Tea	acner, Counselor, Case	Manager

SOMERSET COUNTY

Incentive for Grade Point Increases
This contract provides an incentive for grade point average increases. It also establishes a timeline to include a marking period. A mid-marking period reward is also a feature. The teacher, counselor, or case manager enters into this agreement.



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PLEASE RETURN BY:

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* These students are participating in an incentive performance contract. A mid-marking grade point average will be necessary to provide appropriate awards. Thank You.

SOMERSET COUNTY

TEACHER:

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DORCHESTER COUNTY

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MARYLAND'S TOHORROW PROGRESS

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COMPLETING DAILY CLASSWORK			
COMPLETING HOMEWORK			
ARRIVING TO CLASS ON TIME			
APPROPRIATE CLASS BEHAVIOR			

SPECIFIC RECOMMENDATIONS FOR IMPROVEMENT/COMMENTS:

Staff Feedback Sheet

This form provides a means for staff feedback to the case manager or person responsible for monitoring the activities of students. Note the section which includes specific recommendations for improvements.

Montgomery County

CRISFIELD HIGH SCHOOL MARYLAND'S TOMORROW STUDENTS CHAULATIVE REPORT 1989 - 1990

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SOMERSET COUNTY					Mar	yland's To	morrow Stude	ents Cumulat	ive Renor	
57 PP 18 20 A					For The	the Maryl	vides, at a	This form provides, at a glance, grade point averages for the Maryland's Tomorrow period of intervention.	de point f interve	averages ntion.
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MARYLAND'S TOMORROW WEEKLY STUDENT PROCRESS

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SCHEDULE					 		
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Maryland's Tomorrow Weekly Student Progress
This is a student's record form. The student
makes the chart up to fit his schedule.

MONTGOMERY COUNTY



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GRADE CONFIGURATION TABLE FOR 9-WEEK MARKING PERIODS WITH EXAM (FINAL EXAM = 25%)

AAA=A AAB=A AAC=A AAD=B AAE=B	BAA=A BAB=B BAC=B BAD=B BAE=B	CAA=B CAB=B CAC=B CAD=B CAE=C	DAA=B DAB=B DAC=C DAD=C DAE=C	EAA=B EAB=C EAC=C EAD=C EAE=C	PPF=P PPF=P PPF=P	PPP=P PPP=P PPP=P
ABA=A ABB=B ABC=B ABD=B ABE=B	BBA=B BBB=B BBC=B BBD=B BBE=C	CBA=B CBB=B CBC=C CBD=C CBE=C	DBA=B DBB=C DBC=C DBD=C DBE=C	EBA=C EBB=C EBC=C EBD=D EBE=D		
ACA=B ACB=B ACC=B ACD=B ACE=C	BCA=B BCB=B BCC=C BCD=C BCE=C	CCA=B CCB=C CCC=C CCD=C CCD=C	DCA=C DCB=C DCC=C DCD=D DCE=D	ECA=C ECB=D ECC=D ECD=D ECE=D		
ADA=B ADB=B ADC=C ADD=C ADE=C	BDA=B BDB=C BDC=C BDD=C BDE=C	CDA=C CDB=C CDC=C. CDD=D CDE=D	DDA=C DDB=C DDC=D DDD=D DDE=D	EDA=D EDB=D EDC=D EDD=D EDE=E		
AEA=B AEB=C AEC=C AED=C AEE=C	BEA=C BEB=C BEC=C BED=D BEE=D	CEA=C CEB=C CEC=D CED=D CEE=D	DEA=C DEB=D DEC=D DED=D DEE=E	EEA=D EEB=D EEC=D EED=E		

GRADE CONFIGURATION FOR 9-WEEK MARKING PERIODS WITHOUT EXAM

																						_				
AA	=	A	1	BA		· A	1	CA		В	1	DA	=	В	1	EA	=	C	- 1	PP	=	P	1	PP	-	P
				BB																						
AC	_	n	i	20	_	7	i	CC	_	ī	i	DC	-	~	i	PC	_	ň	Ĺ			•				-
AD																			Γ		_					
																			- 1							
AB	=	C	1	BE	-	C	1	CE	-	Ð		DE	=	5	1	EB	=	8								

HONTEOMERY COUNTY

Grade Configuration Table for 9-week Marking Period Students usually do not understand how grades are determined. These configurations provide examples for students to follow. Teachers need to apply these to their own situation.



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MARYLAND'S TOMORROW STUDENT PROGRESS REPORT

1989 - 1990

SUBJECTS	GI	RADE	S PE	R M/	ARKII	NG P	ERIOD		P.A.	COMMENTS
		1	2	3	4	5	6	FY89	FY90	

				<u> </u>	1	ļ	<u> </u>	1	<u> </u>		_	
	7475	LACENT	250	МАВ	KING	pro	ממני	VEADLY	Y TOTALS	- -		
	5A13 .	-336141	:	···				1 57:12	· · · · · · · · · · · · · · · · · · · ·			
	77.13	1	2	3	1	5	<u> </u>	FY89	FY90			
VERIFIED	<i>3R</i> 13	1	1]	1	<u> </u>	<u> </u>	i				

Maryland's Tomorrow Student Progress Report This form provides student and teacher with a means to track grades over the six marking periods of the school year. If students are working toward the goal of improving their current grades versus what they accomplished the year before, then a column is added for the current year's grades and last year's grade. Note also the section for attendance.

SOMERSET COUNTY

STUDENT

MATHEMATICS

SOCIAL STUDIES

MD. TOMORROW

SCIENCE

TYPING

MUSIC



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MONDAY

		U812
	Class	Assignment
1 -		
2 _		
3 _		
_		
4 -		
5 -		·
6 _		
7 _		
		TUESDAY
		Date
	Class	Assignment
	_ ·	-
1 -		
2 _		
3 _		
٠,		
5.		
ô.		
7.		
		WEDNESDAY
		Date
	Class	Assignment
1		
2.		ment Sheets - Weekly
3 .	These	pages help the student keep track of class assignments.
4.		ment sheets also serve to reinforce being prepared asses. Note also the space for special assignments.
5		
•		
6		
7		

MONTGOMERY COUNTY

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THURSUAY

	Date
Class	Assignment
1	
2	
4	
5	
6	
7	
	FRIDAY
	Date
Class	Assignment
1	
2	
3	
4	
5	
ô	

Special Projects or Assignments

To Do	Date Due

DATE	SUBJECT	ASSIGNMENT	COMPLETE
	⋖		
	Assignment Sheet. This form is another was imments. It can be	way to accomplish keeping track of class be used as a daily class assignment sheet	
	also.	i	
		SOMERSET COUNTY	
		- ³³ 4 2	05

JANUARY 1990

Saturday		ii ii	2	Ø	agement devise useful to r tests and to remember Time management is an nts to begin using.
frkday	LO	27	18 EXIII 19 PERIOD 4 - 8:15	NO 26 \$	
thursday	4		18 8:15 2:00	-up 15	The Monthly Calendar This is another time man helping students plan fo other importent events. excellent tool for stude
wednesday	ಣ	G	REVIEW 17 FOR EXAMS	23 Keyla's 24 8-8 Phke-UP 8:15 E XANIS 8:00	
tuesday	N	C.	91	EXAM PERIOD 2-8	Geaterawn Basketball
monday		8	14 School 15	21 EXAM 22 PERIOD 3-8:15 6-12:00	STIRT OF SECOND SEVENTER
sunday		L	14	21	28

NAME		
MAGE _		
SCHEDULE		

	SUBJECT	TEACHER	ROOM
1.			
2.			
3.			
4.			
5.			
6.	•		
7.			
8.		ì	

	FATHER'S NAME	PHONE
PARENT'S WORK NUMBERS	MOTHERS'S NAME	PHONE
HOME ADDRESS		
HOME PHONE		

Student's Schedule with Parent Signature This form provides a ready reference for students, parents and the school on courses, teachers and rooms of classes. When parents are involved, grades tend to be impacted.

MONTGOMERY COUNTY



STUDENT'S	MAME	*	•.	THE PROPERTY.
GRADE:				HOME:
			MOTHER'S	WORK:
			FATHER'S	
DATE	TIME	REASON FOR CALL	LING	RESPONSE
	,	1.		
				
				
			· 	
	·			
·				
				
				
				
				
		The Telephon	e Log	
		managers and	others to	an excellent form for case use when there is a need to
	-	. verify phone the case man	calls. The	is is also used to remind need to call for problems as
		well as succ	8550E.	

