

CONFERENCE NOTES LOG

A running log of every conference and contact across the school year. Eight one-per-page notes entries, a caseload directory, a running index and summary, conversation starters and topics, a family update and quick-contact note, a second-audience page, and a filled example.

CONFERENCE LOG: How This Log Works and What This Is Not

A one-page form repeated for each conference or contact across the year. Everything on the same format so the year's conversations stay in one place.

This log holds one conference notes entry per page, repeated as many times as you need across the school year. One page for the parent phone call in September, one for the October classroom conference, one for the November IEP annual review, one for the January check-in—every contact on the same form so the whole year of conversations stays in one place.

How this log differs from the conference forms product

PRODUCT	WHAT IT DOES
Parent Teacher Conference Forms Editable product (18029915)	A one-time-use prep sheet, agenda page, discussion notes, action items, and follow-up letter for ONE conference—for the formal IEP meeting or the one classroom check-in where you need all five pages together.
This Conference Notes Log	A running log of every conference and contact across the whole year—one notes-entry page repeated for each contact, plus a year-at-a-glance summary of who has been contacted and when.

The conference notes entry (pages 6-13)

Every entry asks for the same information: date, who was there, what you discussed (topics and concerns), what the family shared, what will change, when the next check-in is, and the follow-up contact information. Write it the same day so the details are fresh.

Print the pages again when you run out of entries (might fit most years with monthly conferences). File one copy in the student's folder and send a copy home to the family if the conference was formal.

What the blank lines are for

SETUP: Caseload Contact Directory

The whole caseload on one page: guardian, phone, email, language preference, and the date of the last contact so nobody goes a month unheard from.

TEACHER / CASE MANAGER		YEAR	CASELOAD SIZE		SCHOOL YEAR DATES	
STUDENT	PARENT / GUARDIAN	PHONE	EMAIL	LANGUAGE & BEST TIME	LAST CONTACT	
Student 1	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 2	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 3	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 4	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 5	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 6	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 7	Parent / Guardian	Phone	Email	Language & best time	Last contact	
Student 8	Parent / Guardian	Phone	Email	Language & best time	Last contact	

CONFERENCE LOG: Conference Notes A

Entry 1: date, who was there, what was discussed, what will change, and the next check-in.

STUDENT	DATE OF THIS CONFERENCE	ATTENDEES	TIME
PARENT / GUARDIAN NAME	PHONE / EMAIL	CONFERENCE TYPE (IEP MEETING, CLASSROOM CHECK-IN, PHONE CALL, ETC.)	
What was discussed (topics, concerns, progress, observations, family input)			
What will change (agreements, action items, new strategies, next steps)			

TRACKING: Running Index and Summary

One line per student per year. Track the date of each conference, who attended, and the main outcome so you can see at a glance who has been contacted and when to follow up.

One line per student per conference. As you add notes entries through the year, write a quick summary here so you can see at a glance who has been contacted and when to check in next. Copy the main outcome from each conference notes page.

ENTRY	DATE	STUDENT	ATTENDEES	MAIN TOPIC / OUTCOME	NEXT CHECK-IN
Entry 1	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 2	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 3	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 4	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 5	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 6	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 7	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 8	Date	Student	Attendees	Main topic / outcome	Next check-in

EXAMPLE: One Conference Notes Entry, Filled In

An invented student and family, Marcus and his mother, with a complete notes entry so you can see how one real conference turns into one finished page.

Example: One conference notes entry
Student: Marcus, grade 4. Date: October 8. Attendees: Teacher (Sarah), mother. Type: Classroom check-in. Next contact planned: December 14.

What was discussed (from the conference notes entry)
Marcus's strengths: Reads grade-level text fluently when he previews it first. Peer interactions are improving: he asked a neighbor for help yesterday instead of getting frustrated. Progress on math: Solves one-step word problems independently; multi-step problems still need a prompt to re-read. What the family shared: Marcus says math homework "takes forever" some nights. Mother wonders if extended time on tests is actually helping or if he is just rushing through.

What will change
1. Teacher will add a visual checklist for multi-step problems and let Marcus check off each step as he goes. 2. Family will time homework for two weeks and share notes about what they notice. 3. At the next check-in, we will talk about whether the timing practice helped.

Next check-in
Date: December 14 (two months, before end-of-quarter). How: 15-minute classroom conference after school; mother will bring the homework timing notes.

Why this checks out
The entry names specific observations (reads fluently when he previews; rushes on multi-step problems).

How This Log Works and What This Is Not

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This log holds one conference notes entry per page, repeated as many times as you need across the school year. One page for the parent phone call in September, one for the October classroom conference, one for the November IEP annual review, one for the January check-in — every contact on the same form so the whole year of conversations stays in one place.

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The conference notes entry (pages 6-13)

Every entry asks for the same information: date, who was there, what you discussed (topics and concerns), what the family shared, what will change, when the next check-in is, and the follow-up contact information. Write it the same day so the details are fresh.

Print the pages again when you run out of entries (eight fits most years with monthly conferences). File one copy in the student's folder and send a copy home to the family if the conference was formal.

What the blank lines are for

- ☐ Every blank is for what is true, not what feels true. Write what you saw and heard, not your judgment.
- ☐ A filled notes entry is a student record the moment it is written. Keep it with your case files, not on a desk, and follow your district's records policy and FERPA guidance.
- ☐ Nothing on this form decides anything on its own. The parent's words stay the parent's own words. Nobody becomes a label from these notes.

If eight entries is not enough this year

Print extra copies of a blank entry page (page 6) and add them to the same folder, in date order, with the running index on page 14 updated to match. A caseload of students who conference often may need two or three printed sets a year — the entry page is the same form every time.

Conference Notes A

Entry 1: date, who was there, what was discussed, what will change, and the next check-in.

STUDENT	DATE OF THIS CONFERENCE	ATTENDEES	TIME
PARENT / GUARDIAN NAME	PHONE / EMAIL	CONFERENCE TYPE (IEP MEETING, CLASSROOM CHECK-IN, PHONE CALL, ETC.)	

What was discussed (topics, concerns, progress, observations, family input)

What will change (agreements, action items, new strategies, next steps)

Next check-in: when and how

Date of next contact:

How we will communicate:

(CALL, EMAIL, QUICK NOTE, IN-PERSON, TEXT)

Entry 2: date, who was there, what was discussed, what will change, and the next check-in.

STUDENT	DATE OF THIS CONFERENCE	ATTENDEES	TIME
PARENT / GUARDIAN NAME	PHONE / EMAIL	CONFERENCE TYPE (IEP MEETING, CLASSROOM CHECK-IN, PHONE CALL, ETC.)	

What was discussed (topics, concerns, progress, observations, family input)

What will change (agreements, action items, new strategies, next steps)

Next check-in: when and how

Date of next contact:

How we will communicate:

(CALL, EMAIL, QUICK NOTE, IN-PERSON, TEXT)

Running Index and Summary

One line per student per year. Track the date of each conference, who attended, and the main outcome so you can see at a glance who has been contacted and when to follow up.

One line per student per conference. As you add notes entries through the year, write a quick summary here so you can see at a glance who has been contacted and when to check in next. Copy the main outcome from each conference notes page.

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Entry 7	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 8	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 9	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 10	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 11	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 12	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 13	Date	Student	Attendees	Main topic / outcome	Next check-in
Entry 14	Date	Student	Attendees	Main topic / outcome	Next check-in

EXAMPLE

One Conference Notes Entry, Filled In

An invented student and family, Marcus and his mother, with a complete notes entry so you can see how one real conference turns into one finished page.

Example: One conference notes entry

Student: Marcus, grade 4. **Date:** October 8. **Attendees:** Teacher (Sarah), mother. **Type:** Classroom check-in. **Next contact planned:** December 14.

What was discussed (from the conference notes entry)

Marcus's strengths: Reads grade-level text fluently when he previews it first. Peer interactions are improving; he asked a neighbor for help yesterday instead of getting frustrated. **Progress on math:** Solves one-step word problems independently; multi-step problems still need a prompt to re-read. **What the family shared:** Marcus says math homework "takes forever" some nights. Mother wonders if extended time on tests is actually helping or if he is just rushing through.

What will change

1. Teacher will add a visual checklist for multi-step problems and let Marcus check off each step as he goes. 2. Family will time homework for two weeks and share notes about what they notice. 3. At the next check-in, we will talk about whether the timing practice helped.

Next check-in

Date: December 14 (two months, before end-of-quarter). **How:** 15-minute classroom conference after school; mother will bring the homework timing notes.

Why this checks out

The entry names specific observations (reads fluently when he previews; rushes on multi-step problems), captures what the family said (homework time concern), and lists two concrete agreements (visual checklist for teacher, two-week homework timing for family). The follow-up is specific (two weeks, what to watch for) so at the next check-in you can say, "The checklist seemed to help last month. What did you notice at home?"

The entry does NOT make a judgment ("Marcus is lazy"), does NOT introduce a new concern that was not discussed, and does NOT promise something nobody agreed to.

Using this example with your own entries

One observation per topic, one thing the family said, one agreement per decision. A short entry like this is easier for a family to understand and easier for you to check at the next meeting: Did the checklist happen? Did the two-week timing happen? What did they show?