

THE SCHOOL MEETING DOCUMENTATION TEMPLATE

Document the Pattern, Change the Outcome

by KidStart Pediatric Therapy

This guide was created to help you walk into your next school meeting prepared, confident, and equipped with the kind of specific, pattern-based documentation that moves conversations from vague concerns to concrete action. When you document what you actually observe – with dates, details, and context – you become your child's most powerful advocate.

📄 🖨️ **Print this guide and bring it to your next school meeting.** Each section is designed to be filled in by hand. Start documenting at least two weeks before your scheduled meeting for best results.

Inside this template, you will find five structured sections: a Trigger Log to capture patterns over time, a Skills Inventory to highlight the gap between home and school performance, a Magic Question Prep sheet to sharpen your one key ask, an Accommodations Request table to organize your priorities, and a Follow-Up Tracker to hold the team accountable. Together, these tools give you a complete picture – and a clear path forward.

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Section 2: The Skills Inventory

HOME VS. SCHOOL

One of the most powerful pieces of information you can bring to a school meeting is a clear, documented comparison of what your child can do independently at home versus what falls apart in the school environment. This is not about blaming the school – it is about demonstrating that the skill exists, which means the barrier is environmental, not developmental. That distinction changes the entire conversation.

Fill in both tables below. Be as specific as possible. Instead of "gets dressed," write "puts on shirt, pants, and shoes independently after one verbal prompt." The more specific you are, the more credible and actionable your documentation becomes.

Table 1: Home Skills (Independent)

Skill	How They Do It	Context / Conditions
<i>Gets dressed independently</i>	<i>Chooses clothes, dresses fully after one verbal prompt, no meltdown</i>	<i>Quiet bedroom, no time pressure, familiar routine</i>

Table 2: School Struggles

Task	What Happens Instead	Frequency
<i>Transitioning to lunch</i>	<i>Refuses to pack up, shuts down, requires physical prompt from teacher</i>	<i>3-4x per week</i>

Section 3: The Magic Question Prep

ONE SPECIFIC, TIME-BOUND, LOW-COST TRIAL REQUEST

The most effective thing you can do in a school meeting is walk in with one clear, specific, time-bound request – not a list of grievances, and not a vague ask for "more support." The Magic Question is a powerful framing tool: it positions your request as a low-risk trial rather than a permanent demand, making it easier for the team to say yes. It also defines success up front, so you have something measurable to evaluate together.

Use the prompts below to prepare your one trial request before the meeting. Practice saying it out loud. When you deliver it at the table, it signals that you are a collaborative, solution-focused partner – and that you expect accountability.

<h3>My One Trial Request</h3> <p>"Can we try _____ _____</p> <p>for 2 weeks and measure</p> <p>_____?</p> <p>"</p> <p><i>Write your request here before the meeting. Keep it to one sentence.</i></p> <p>Your trial request:</p> <p>_____ _____ _____ _____ _____ _____ _____</p>	<h3>What Success Looks Like</h3> <p>Define this before the meeting so everyone agrees on the goal.</p> <p>Success for us looks like:</p> <p>_____ _____ _____ _____ _____ _____ _____ _____ _____ _____</p>	<h3>How We'll Track It</h3> <p>Agree on who collects data and how it will be shared with you.</p> <p>Tracking method:</p> <p>_____ _____ _____</p> <p>Person responsible:</p> <p>_____ _____ _____ _____</p> <p>Review date:</p> <p>_____ _____ _____</p>
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Examples to Inspire Your Request

- "Can we try giving him a 2-minute transition warning before every activity change for 2 weeks and track how many transitions he completes without a shutdown?"
- "Can we try letting her sit in the back row during whole-group instruction for 2 weeks and measure how often she completes her seatwork independently?"
- "Can we try providing a visual schedule on his desk for 2 weeks and track how many times he asks 'what's next?' versus the current baseline?"

Section 4: Accommodations to Request

ORGANIZE YOUR PRIORITIES

Accommodations are changes to how your child accesses the curriculum or environment – not changes to the content itself. Coming to the meeting with a prioritized, clearly described list of accommodations signals that you have done your research and are ready to problem-solve. For each accommodation, be specific about the current problem it addresses. Vague requests like "more support" rarely result in written commitments. Specific requests like "a printed daily schedule placed on her desk by 8:15am" are actionable and measurable.

In the "Cost / Training Needed" column, think realistically about what each accommodation requires of the school. Low-cost, low-training accommodations are the easiest wins. Lead with those. Higher-cost items can be framed as longer-term goals or included in an IEP addendum. Prioritizing shows the team you are reasonable and strategic – and it makes yes much easier to say.

Current Problem	Specific Accommodation Request	Cost / Training Needed
<i>Overwhelmed by hallway noise during transitions</i>	<i>Allow use of noise-reducing headphones during hallway transitions</i>	<i>Low – parent-provided headphones, no training needed</i>

Section 5: Follow-Up Tracker

HOLD THE TEAM ACCOUNTABLE

The meeting itself is only the beginning. What matters most is what happens in the days and weeks after. This Follow-Up Tracker is designed to help you document every action item, check-in, and outcome so that nothing falls through the cracks. Too often, parents leave a productive meeting feeling hopeful – only to find weeks later that nothing changed because no one was tracking implementation. This section puts that accountability structure in your hands.

After each meeting or check-in, record what was agreed upon, what was actually tried, what the result was, and what the logical next step should be. Share this log with the teacher or case manager at each follow-up. When the school team knows you are documenting, they are more likely to follow through. This is not about distrust – it is about creating the conditions for your child's success. Consistent, documented follow-up is one of the most powerful advocacy tools available to parents.

Date	What Was Tried	Result / Outcome	Next Step
9/16/24	2-min transition warning implemented by Ms. Rivera during morning block	2 of 3 transitions completed without shutdown – improvement noted	Expand to afternoon transitions; check in 9/23

