TEACHER DOCUMENTATION AND MEETING TOOLKIT

Practical Forms, Follow-Up Templates & Systems for Clear Records and Next Steps



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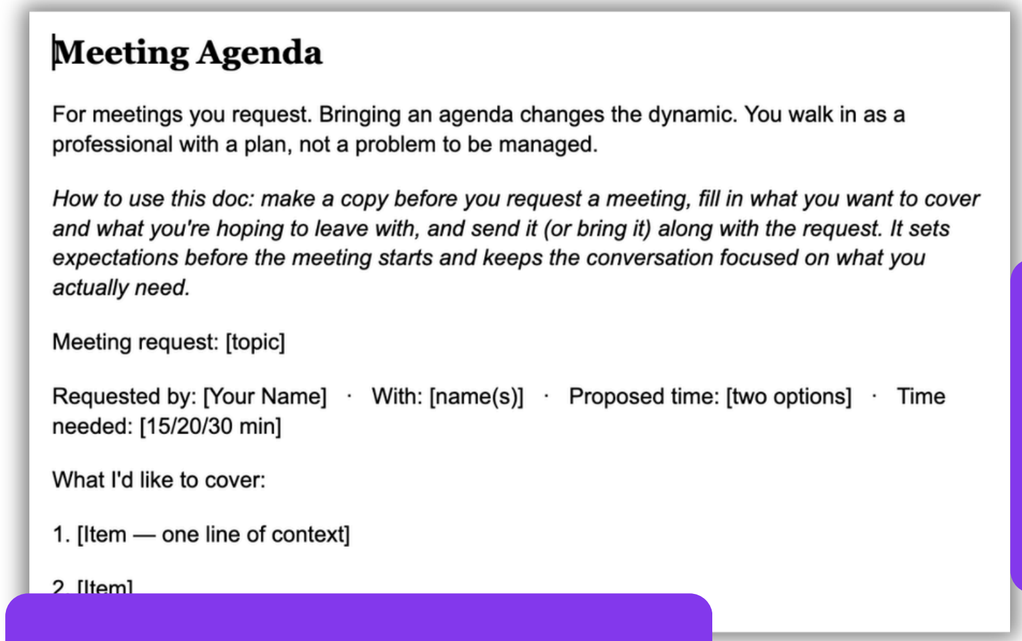
2 GUIDES

4 FILLABLE PDFS

4 DOCS

3 TEMPLATES

MANAGE MEETINGS FROM BEGINNING TO END



Meeting Agenda

For meetings you request. Bringing an agenda changes the dynamic. You walk in as a professional with a plan, not a problem to be managed.

How to use this doc: make a copy before you request a meeting, fill in what you want to cover and what you're hoping to leave with, and send it (or bring it) along with the request. It sets expectations before the meeting starts and keeps the conversation focused on what you actually need.

Meeting request: [topic]

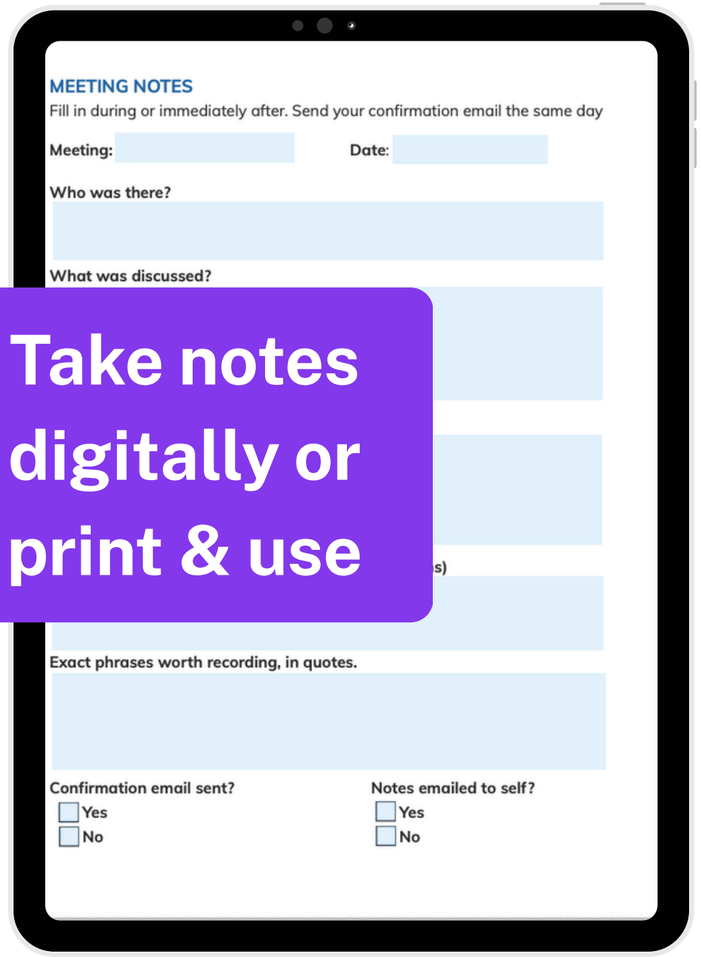
Requested by: [Your Name] · With: [name(s)] · Proposed time: [two options] · Time needed: [15/20/30 min]

What I'd like to cover:

1. [Item — one line of context]

2. [Item]

Go in prepared



MEETING NOTES

Fill in during or immediately after. Send your confirmation email the same day

Meeting: Date:

Who was there?

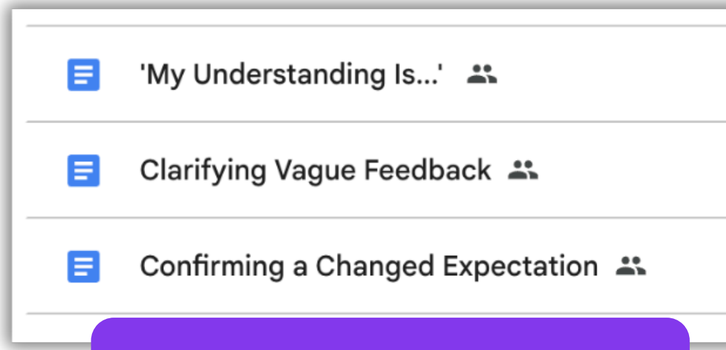
What was discussed?

Exact phrases worth recording, in quotes.

Confirmation email sent? Yes No

Notes emailed to self? Yes No

Take notes digitally or print & use



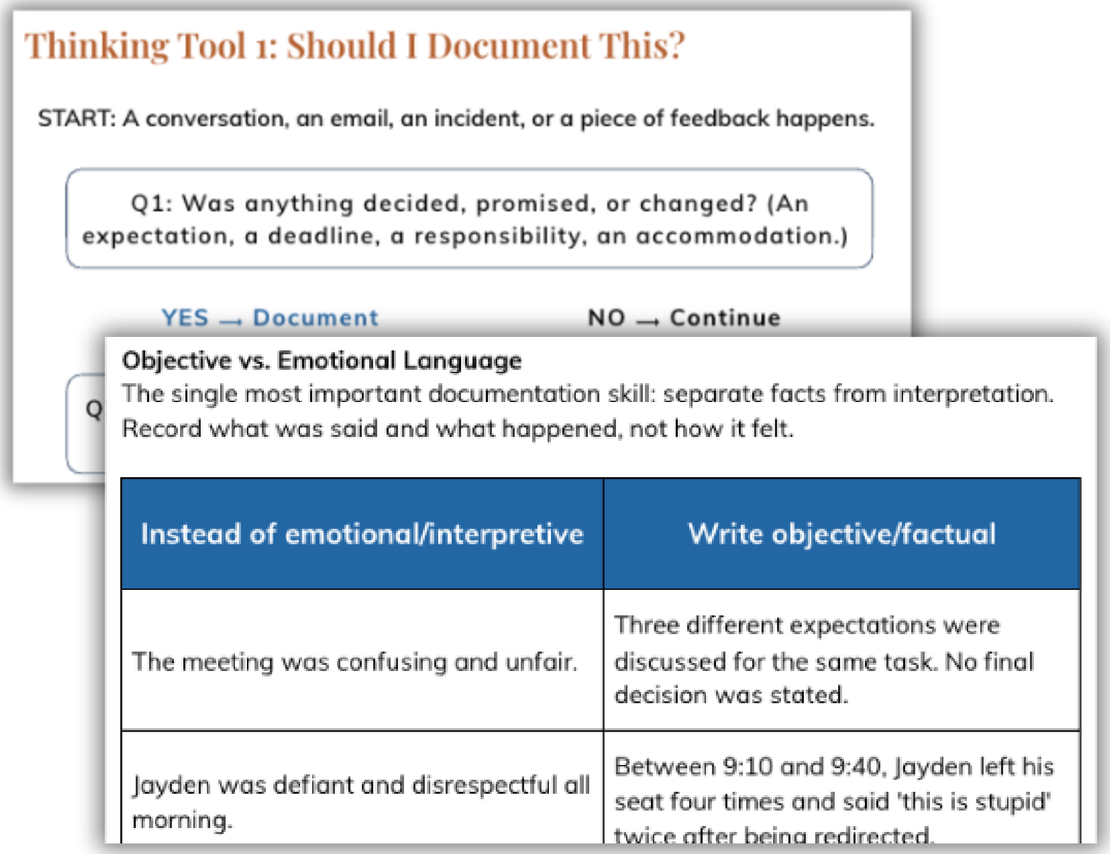
'My Understanding Is...'

Clarifying Vague Feedback

Confirming a Changed Expectation

Follow up with templates

LEARN WHAT TO DOCUMENT & USE FORMS TO KEEP TRACK



Thinking Tool 1: Should I Document This?

START: A conversation, an email, an incident, or a piece of feedback happens.

Q1: Was anything decided, promised, or changed? (An expectation, a deadline, a responsibility, an accommodation.)

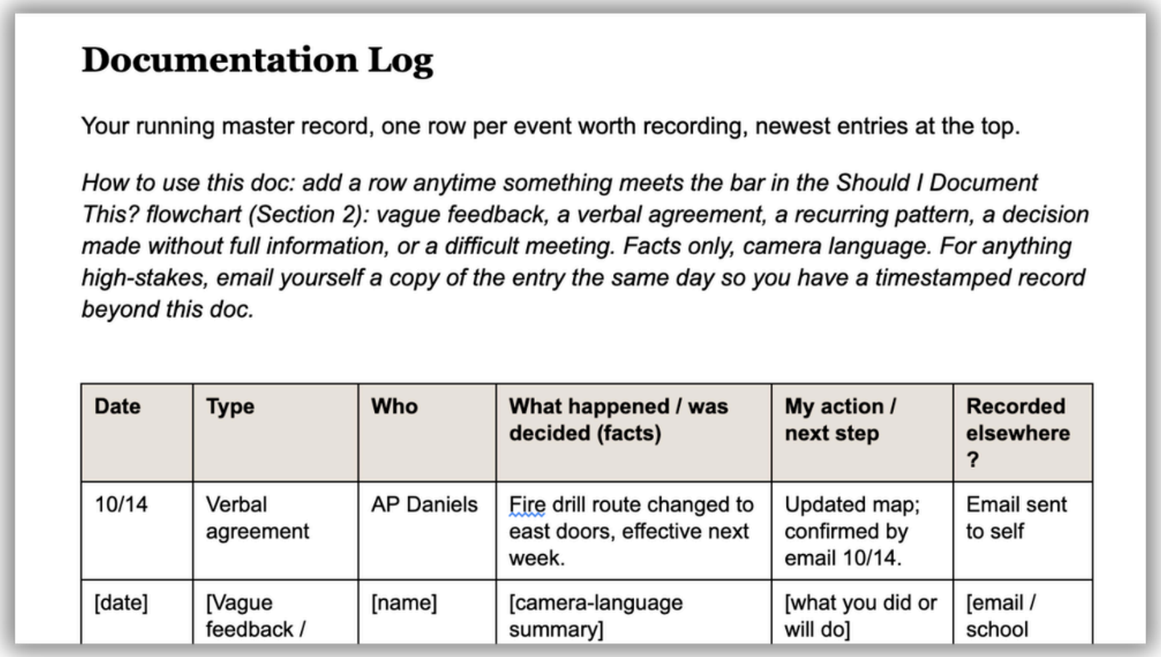
YES → Document

NO → Continue

Objective vs. Emotional Language

The single most important documentation skill: separate facts from interpretation. Record what was said and what happened, not how it felt.

Instead of emotional/interpretive	Write objective/factual
The meeting was confusing and unfair.	Three different expectations were discussed for the same task. No final decision was stated.
Jayden was defiant and disrespectful all morning.	Between 9:10 and 9:40, Jayden left his seat four times and said 'this is stupid' twice after being redirected.



Documentation Log

Your running master record, one row per event worth recording, newest entries at the top.

How to use this doc: add a row anytime something meets the bar in the Should I Document This? flowchart (Section 2): vague feedback, a verbal agreement, a recurring pattern, a decision made without full information, or a difficult meeting. Facts only, camera language. For anything high-stakes, email yourself a copy of the entry the same day so you have a timestamped record beyond this doc.

Date	Type	Who	What happened / was decided (facts)	My action / next step	Recorded elsewhere ?
10/14	Verbal agreement	AP Daniels	Fire drill route changed to east doors, effective next week.	Updated map; confirmed by email 10/14.	Email sent to self
[date]	[Vague feedback /	[name]	[camera-language summary]	[what you did or will do]	[email / school

KEEP TRACK OF SHIFTING EXPECTATIONS

Decision Tracker

The quiet power tool. Log every decision that affects your work whether made by you, or handed to you. When expectations shift, this is yo

How to use this doc: add a row anytime a decision or expectation is set, confirmed, or changed: a due date, a procedure, a directive, an agreement made i entry takes under a minute. The pattern it reveals over a semester is what makes it worth keeping.

Date	Decision / Expectation	Who Decided / Communicated It	What It Replaced (if anything)	Confirmed in Writing? (Y/N + date)	Status
9/12	Data wall due Oct 1. Format: reading scores only.	AP Daniels, verbally after staff meeting	Nothing — first version of this expectation	No — verbal only	Superseded (
9/26	Data wall format is changing. New guidance "coming soon." No due date confirmed.	AP Daniels, verbally in hallway	9/12 reading-scores version	Yes — confirmation email sent to self, 9/26, 3:40 p.m.	Active

Helps you remember & gives a record if you need it

Keep track of student incidents

INCIDENT LOG

Complete the same day. Describe what a camera would have recorded.

Date: **Time:**

Location:

Who was involved? (Initials are fine for confidentiality on printed copies)

What happened? (Observable facts in sequence)

MONITOR & PROTECT YOUR TIME



Weekly Workload Review

The Docs version of the Weekly Reset for teachers who live in Google and want their whole year building in one place.

How to use this doc: every Friday, work through the same four steps as the Weekly Reset form (Part 2). Copy the template block below, paste it above the archive, fill it in, and date it. Over a semester, this becomes a running record of your year — worth skimming before conferences, evaluations, or just to notice which months quietly generated the most invisible work.

[Week of: _____]

Copy everything between this line and the next horizontal rule to start a new week. Paste it above last week's entry so the newest week stays on top.

Step 1 — Empty Your Head

List every unfinished, unclear, or nagging item. Not the official to-do list — the other one. The half-formed questions. The things you're "keeping in mind." The tasks you haven't started because you're not sure what they are yet.

Step 2 — Sort It

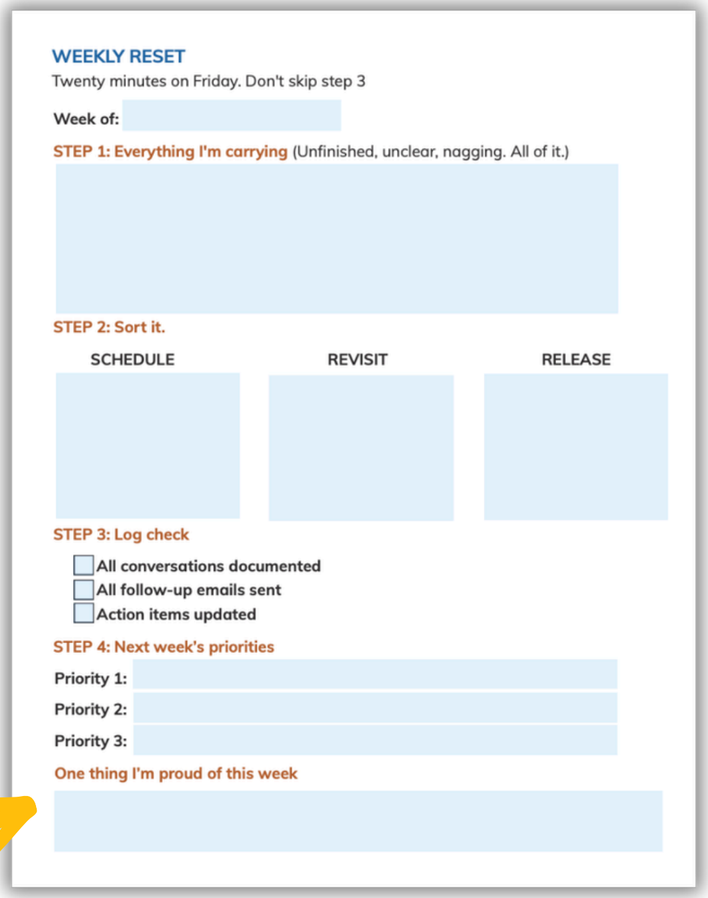
Move each item from Step 1 into one of three columns. Don't skip Release — leaving something open by default is what lets it keep draining you.

SCHEDULE — has a defined next step. When, exactly?

REVISIT — not enough clarity yet. When will you look again?

20 Minutes every Friday = a calmer weekend and more time all week

Doc or Fillable PDF



WEEKLY RESET

Twenty minutes on Friday. Don't skip step 3

Week of:

STEP 1: Everything I'm carrying (Unfinished, unclear, nagging. All of it.)

STEP 2: Sort it.

SCHEDULE	REVISIT	RELEASE

STEP 3: Log check

- ☐ All conversations documented
- ☐ All follow-up emails sent
- ☐ Action items updated

STEP 4: Next week's priorities

Priority 1:

Priority 2:

Priority 3:

One thing I'm proud of this week



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!

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