Annual Administrator Conference Planner

Prepare the yearly meeting with your principal or the administrator in charge

Hold it within the first two months of school. One planner per school counselor.

The conference

School counselor _____ School and year _____ Administrator in charge _____

First day of school _____ Conference date and time _____ Two month deadline _____ Others attending _____

Bring and share (tick when ready)

- ☐ ASCA Student Standards delivery plan
- ☐ School counseling data priorities
- ☐ Last year's lesson and group data
- ☐ Draft annual calendar
- ☐ ASCA appropriate activities list
- ☐ Achievement gap plan(s)
- ☐ Two use-of-time calculators, last year
- ☐ Advisory council dates and members
- ☐ PD plan with costs
- ☐ One page summary for the principal

Achievement gap goal(s), copied from your achievement gap plan

1 _____

2 _____

Use of time: last year's average and this year's plan (percent)

	Direct student services	Indirect student services	Program planning	Fair-share school support	Non-school-counseling duties
Last year (avg)	%	%	%	%	%
Plan this year	%	%	%	%	%

ASCA recommends 80% or more in direct plus indirect, 20% or less in planning plus fair-share support.

Ratio and caseload (ASCA recommends 1:250)

Full or part time _____ My ratio, 1 to _____ Caseload by _____ Change I will ask about _____

My three asks, each tied to a student result

1 _____

2 _____

3 _____

Advisory council, professional development and budget

Fall meeting _____ Spring meeting _____ Proposed members (count by role) _____

PD planned (dates) _____ PD cost _____ Materials and supplies _____ Budget _____

Notes: committees, presentations, office hours, staff roles, questions

A prep and notes tool. For RAMP, copy your answers into ASCA's fifth edition template in its original form.

Annual Administrator Conference Planner

Prepare the yearly meeting with your principal or the administrator in charge

FILLED EXAMPLE · fictional school, people, numbers and dates

The conference

School counselor	School and year	Administrator in charge
J. Rivera	Maple Hollow Elem., 2027-28	A. Brooks, principal

First day of school	Conference date and time	Two month deadline	Others attending
Mon 08/16/2027	Thu 08/26/2027, 3:30	By Fri 10/15/2027	None

Bring and share (tick when ready)

- [x] ASCA Student Standards delivery plan
- [x] School counseling data priorities
- [x] Last year's lesson and group data
- [x] Draft annual calendar
- [x] ASCA appropriate activities list
- [x] Achievement gap plan(s)
- [x] Two use-of-time calculators, last year
- [x] Advisory council dates and members
- [x] PD plan with costs
- [x] One page summary for the principal

Achievement gap goal(s), copied from your achievement gap plan

1. By the end of April 2028, at least 13 of the K and grade 1 students who have missed 10% or more of school days by 10/01/2027 will be below 10% for the year to date.
2. Second gap plan: none this year. Grades 3 to 5 math supported through Tier 1 lessons and groups.

Use of time: last year's average and this year's plan (percent)

	Direct student services	Indirect student services	Program planning	Fair-share school support	Non-school-counseling duties
Last year (avg)	51 %	13 %	14 %	10 %	12 %
Plan this year	60 %	16 %	14 %	7 %	3 %

ASCA recommends 80% or more in direct plus indirect, 20% or less in planning plus fair-share support.

Ratio and caseload (ASCA recommends 1:250)

Full or part time	My ratio, 1 to	Caseload by	Change I will ask about
Full time	426	All students, K to 5	None this year; revisit in spring

My three asks, each tied to a student result

1. Lunch duty 5 days to 2, so Tier 2 groups can run Tue and Wed at 12:40.
2. Testing coordination moves to the assistant principal; I keep test anxiety lessons.
3. Family liaison joins attendance calls for the K and 1 gap plan.

Advisory council, professional development and budget

Fall meeting	Spring meeting	Proposed members (count by role)
Tue 10/19/2027	Tue 05/09/2028	12 across 7 roles (see list)

PD planned (dates)	PD cost	Materials and supplies	Budget
State conference 10/27 to 10/29	$350	Pre/post copies, group supplies	$400

Notes: committees, presentations, office hours, staff roles, questions

Committees: attendance team (weekly), MTSS Tier 2 team (twice a month), crisis team.

Staff presentation: referral process and when to call me, Wed 09/08/2027.

Office 7:45 a.m. to 3:45 p.m. Registrar runs attendance reports; office assistant files forms.

Ask: can the January check in be on the calendar now? Proposed Thu 01/20/2028.

Conference Notes and Follow Up Log

What the administrator said, what you agreed, and how you will check back in

The conference

School counselor	Administrator	Date held	Template signed (date)

Administrator response by topic (write what was said, not only what you showed)

Topic	Response, in the administrator's words where you can	Agreed?		
Gap goal(s) and school goals		☐ Y	☐ N	☐ Later
Student Standards delivery plan		☐ Y	☐ N	☐ Later
Use of time and duties		☐ Y	☐ N	☐ Later
Ratio, caseload, structure		☐ Y	☐ N	☐ Later
Advisory council		☐ Y	☐ N	☐ Later
PD, budget, office, staff		☐ Y	☐ N	☐ Later

Decisions and action items

Action	Who	By when	Done
			☐
			☐
			☐
			☐
			☐

Use of time helper: average your two calculator weeks

	Direct student services	Indirect student services	Program planning	Fair-share school support	Non-school-counseling duties
Semester 1 week	%	%	%	%	%
Semester 2 week	%	%	%	%	%
Average	%	%	%	%	%

Average = (week 1 + week 2) / 2 for each column. Rows should each total about 100%.

Follow up check ins

Date	Topic	Outcome and next step

Before you file it, and notes

- ☐ Every section answered or NA
- ☐ Copy to the administrator
- ☐ Calendar updated with dates
- ☐ Signed by both, in two months
- ☐ Minutes typed into the template
- ☐ No student names anywhere

L&T

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