



General Coaching Conversation Template

Use this note-taking template during meetings with coachees as you discuss their goals and next steps. This document was adapted with permission from the AIMS Center for Math and Science Education.

Date:

Coachee Name or Names:

(For peer and group coaching, list the names of all participating coachees.)

Site or Sites:

(For peer and group coaching, list the names of all coachees' sites, if there are multiple.)

Length of Session (in minutes):

Mode of Delivery (in-person, virtual, hybrid):

Topics Discussed

What was discussed during the conversation? What materials (if any) were used to facilitate this conversation? Examples: child assessment data, notes from a recent observation



Coachee's Goals

Were the coachee's goals met or changed in any way? How did the conversation support the coachee to meet their goals? Examples: ask more open-ended questions, provide more processing time for children

Coachee's Next Steps

What is the coachee planning to do next? What is the coachee taking away from this conversation? Examples: action items, shift in mindset, something they want to remember

Coach's Next Steps

What are you planning to do next? What are you taking away from this conversation? Examples: action items, shift in mindset, something you want to remember





Accommodations

List any coaching session accommodations that coachees may have requested, you provided, or both. Examples: language preference, meeting time or location, accommodations for individuals with disabilities

