

Last updated: March 2024

Principal's Visitor/Interaction Log – parents, staff, boards, and community

Nb: This resource is referred to in Complaints - Parents Community contained within the Principals' Kit.

An interaction log is an important and useful memory aid, reporting tool, and chronological record of events, and can be used for reflection. Principals report how worthwhile it is in their work. This resource or something very similar is invaluable when conflict arises.

The examples below are self-explanatory but placed there for a purpose – each tells a story that a principal deemed worth noting. The orange box at the foot of the log suggests several salient points when setting up such a log. The log can include related screen grabs, links, or photos.

Entries should be brief and in an objective tone with no embellishments or commentary. Should an incident or interaction require a more detailed narrative, then these can be stored elsewhere i.e. on the learning management system depending on their sensitivity and audience.

The **Follow-up** column is crucial. The actions recorded here are valuable because they show that the original issue has been taken seriously, the parent feels heard and you care enough to follow through and get back to them.

Depending on how you see this type of tool being used or adapted, it could also be used by members of the senior leadership team or even classroom teachers with some modification.

When to log an entry and what to log is subjective, use your intuition when it tells you that an interaction is worthy of noting. Relationships sit at the heart of principalship. No interaction you have with others is neutral – your last interaction with each individual either enhances or diminishes the relationship. Over time you will determine when it might be prudent to record an event – just in case.

This resource helps reflect on the uara/values expressed in [Our Code Our Standards](#) which define, inspire, and guide us as teachers.

WHAKAMANA: empowering all learners to reach their highest potential by providing high-quality teaching and leadership.

MANAAKITANGA: creating a welcoming, caring, and creative learning environment that treats everyone with respect and dignity.

PONO: showing integrity by acting in ways that are fair, honest, ethical, and just.


WHANAUNGATANGA: engaging in positive and collaborative relationships with our learners, their families

and whānau, our colleagues and the wider community.

As part of your principal's report for the board, this log may simply provide a number of interactions you dealt with over a period of time. You might add a very brief comment on whether the outcome was positive or otherwise. Over time, it may reflect a trend which could be useful to analyse.

This tool is worth making your own. Principals who use them have found them invaluable.

PRINCIPAL'S VISITOR/INTERACTION LOG – parents, boards, community

Date/Time	Visitor/s	Location	Reason/s	Action	Follow up (Set time on calendar each week.)
10:15 3 May 2020	Bruce Willis	Phone call	Concerned that his child Norris was being bullied in the playground by Collie Crusher. Mainly verbal but two incidents of physical bullying where Norris was apparently pushed off the playground.	Sylvester to speak to both students to verify stories. Remind students of Happy Dayz School's behaviour expectations – explain student guide/flowchart etc. Follow restorative justice practices as deemed appropriate. Advise class teacher/s of parent concern. Monitor in playground next week directly or via duty tchr log. If appropriate update Crusher's parent/s.	Rang Bruce to confirm actions taken. Time/Date entered here when done... 3:15pm 10 May. 11 May. Checked on boys on Friday to see how their week has been. So far so good. Happy.
08:40 6 May 2020	Nancy Reagan	Yr 7 classroom	• Checking up on Billy re homework expectations – happy with math... a bit of pressure on Billy re literacy and wants to see other stuff being done too.... Not really a homework person but wants to see/keep in touch with his work etc	Update class tchr who will follow-up by 10 May Watching brief	Ring Nancy to check response from Billy... Hmwk diary etc. Rang 14:30 Fri 9 May just to check (020 ### ####) Happy but will take the opportunity to come and talk with Tchr after school today while its front and centre. Chuffed for following through.
16:30 7 May 2020	Wendy Hillman	Email	• NYLD trip – how were the 6 chosen – what alternative prog for those not going?	16:33 Forwarded to tchr for initial comment	10:20 8 May - Took opportunity to have a coffee/hot water with Wendy after she had done some volunteering in the book room. Went into staffroom for drink and explained how it came about – no heat and Wendy was happy with the detail that sat behind the decision... very complex as many factors added into it since mid-Term 1. Followed-up with call Tue 16 th ... ### ####. Happy with result and happy with follow-up.
08:23 11 May 2020	Rik Stein	My office	• Just briefly with daughter Jane re cell phone use/storage during school day... expectations	Discussed – sorted – all on same page – stored in P's office unless needed for class use	Phone left in P's office and Jane can pick up at end of day... all happy
10:45 & 11:30 11 May 2020	Callie Smythe	Phone then Library	• Disclosure from Ethel to her tchr re domestic incident (plate of food thrown by mum) previous evening – compounded by potential move/tenancy... Ethel upset and not sure about home – happy place is school – happy to talk to tchr and P – want present when talking with mum.	P spent 20 min with Ethel and tchr quietly talking things through and what she would like done... way forward etc and who to talk to etc – P rang mum to see if she had opportunity with little sister at kindy, to come in and chat with Ethel etc. Wanted to know what it was about of course... explained Ethel was in fragile place... needed some reassurance and TLC. Offered to make some calls if she desired ie facilitator for family conference so all can be worked through – perhaps a reluctant dad. After 20 min Ethel happy to continue with mum in Library. P & T left to progress things together. Came back to class and more settled next day. Monitoring ongoing...	Called Callie Tue 16 th . Follow-up with call to see if happy with the way we responded. Yes very happy. Offered help as well if wanted. Chuffed Ethel felt happy to confide in T and P. 

This is a simplistic example, but key things are:

- * Parent has been heard and feels listened to
- * Parent feels that there has been action albeit sometimes not as desired or quickly enough – being digital any item can expand as/when it is revisited – items can be colour-coded to show their status etc
- * A phone call/email at/by the end of the week to say what you did and future action along with a 'thank you for bringing this to my attention as, "It's important to sort these issues asap," type comment.
- * From time to time this record will build a picture for reflection, action or reporting the numbers and types of issues you deal with to the board and the manner and timeliness of the response/s.

Set up another log for Staff Interactions and store any/all files in your personal cloud account not on your school laptop or within the school cloud/system – have a short-cut on your desktop – when you want to record something, you don't want to waste time trying to find the log – be aware these logs could be requested under the OIA.