

SCHOOL COUNSELOR WORKSHOP SERIES

How to Win Friends and Influence Principals

tools for building stronger principal/counselor partnerships

All five handouts are designed to stand alone or work together as a set. Use them as printed worksheets, or drop the prompts into a digital form for remote completion.

WHAT'S INSIDE

HANDOUT 1 Principal/Counselor Relationship Self-Assessment

A private reflection scored across five pillars of the relationship

HANDOUT 2 Principal/Counselor Meeting Agenda

A reusable, structured template for recurring check-ins

HANDOUT 3 30-Day Professional Working Relationship-Building Challenge

Four weeks of small, consistent actions

HANDOUT 4 Principal/Counselor Conversation Starters

Curated questions organized by purpose

HANDOUT 5 Counseling Program Impact Dashboard

A reporting template that ties counseling work to outcomes schools/districts track

HANDOUT 1

Principal–Counselor Working Relationship Self-Assessment

How to Win Friends and Influence Principals

Rate yourself honestly using the scale below. This is a private reflection; no one else will see it.

SCALE: 1 = Almost Never · 2 = Rarely · 3 = Sometimes · 4 = Usually · 5 = Consistently

Shared Purpose

	1	2	3	4	5
I understand my principal/counselor's top priorities for the year.	☐	☐	☐	☐	☐
I can articulate how the counseling program directly supports the school's improvement plan.	☐	☐	☐	☐	☐
I know what the school counseling goals are and why they matter for students.	☐	☐	☐	☐	☐

Shared Purpose Score: ____ / 15

Trust & Reliability

	1	2	3	4	5
I follow through on commitments I make to my principal/counselor.	☐	☐	☐	☐	☐
I communicate proactively; I never surprise my principal/counselor with bad news.	☐	☐	☐	☐	☐
I maintain appropriate confidentiality and professional discretion.	☐	☐	☐	☐	☐
I support my principal/counselor publicly, even when I disagree privately.	☐	☐	☐	☐	☐

Trust & Reliability Score: ____ / 20

Communication

	1	2	3	4	5
I have scheduled recurring meetings with my principal/counselor.	☐	☐	☐	☐	☐
I come to meetings with a clear agenda and desired outcomes.	☐	☐	☐	☐	☐
When I bring a problem, I also bring at least one possible solution.	☐	☐	☐	☐	☐
I ask for feedback on the progress of the counseling program.	☐	☐	☐	☐	☐

Communication Score: ____ / 20

Demonstrating Impact

	1	2	3	4	5
I share data with my principal/counselor that connects counseling work to student outcomes.	☐	☐	☐	☐	☐
I regularly celebrate wins, large and small, with my principal/counselor.	☐	☐	☐	☐	☐
My principal/counselor can name specific ways the counseling program has improved student outcomes.	☐	☐	☐	☐	☐

Demonstrating Impact Score: ____ / 15

Advocacy & Role Clarity

	1	2	3	4	5
My principal/counselor understands the boundaries of appropriate and inappropriate uses of their time.	☐	☐	☐	☐	☐
I advocate for the school counseling program professionally and with evidence.	☐	☐	☐	☐	☐
We have discussed expectations for the school counselor role at least once this year.	☐	☐	☐	☐	☐

Advocacy & Role Clarity Score: ____ / 15

TOTAL SCORE: ____ / 85

Score Range	What It Suggests
68–85	Strong foundation – focus on sustaining and deepening
51–67	Solid in some areas – identify your two lowest scores and start there
34–50	Room to grow – pick one pillar and commit to it this month
Below 34	This relationship needs intentional attention – start with one conversation

My greatest strength: _____**The area I most want to improve:** _____**One specific action I'll take this week:** _____**Name:** _____ **Role:** _____ **Date:** _____

HANDOUT 2

Meeting Agenda

School Counselor–Principal Check-In

Date: _____ Time: _____ Location: _____

School Counselor(s): _____

Principal(s): _____

Meeting Goal for Today: _____

 Opening (2 minutes)

- Brief check-in, use the *Conversation Starters* from Handout 3
- Commit to a shared purpose or school mission statement: *[enter that statement here]*
- Confirm agenda items and time available

 Accomplishments (5 minutes)*What progress can we celebrate?**Use the Counselor Impact Dashboard from Handout 4 to determine what to report here.*

Accomplishment	Connection to School Goals	Data / Evidence

 Opportunities (5 minutes)*What's coming up? What are we planning or preparing for?*

Upcoming Event or Initiative	Timeline	Support Needed from Principal

Challenges (5 minutes)*What's on the horizon that presents difficulty? What do I need help thinking through?*

Challenge: _____

Context / Data: _____

Possible Solution A: _____

Possible Solution B: _____

What I need from you: _____

 Fires (5 minutes)

What needs immediate attention or intervention?

Urgent Item	Action Needed	Who Leads	By When

Principal's Agenda Items (5 minutes)

What does my administrator need from me?

- ☐ _____
- ☐ _____

Next Steps & Closing (3 minutes)

Action Item	Responsible Person	Deadline

Next Meeting Date: _____ **Location:** _____

One thing I'm taking away from today's conversation: _____

TIP Send this agenda to your principal 24 hours before the meeting, and a brief summary of next steps within 24 hours after. This single habit builds more trust than almost anything else.

HANDOUT 3

Principal/Counselor Conversation Starters

For principal/counselor teams who want to lead with curiosity and build influence through questions

These questions are organized by purpose. You don't need to ask them all – choose one or two from each section that feel natural for where your relationship is right now.



Understanding Priorities

- *“What does success look like for our school at the end of this year?”*
- *“Which students or student groups are you most focused on right now?”*
- *“What’s the one thing you most want to improve about our school climate or culture?”*
- *“What district priority are you focused on this year?”*
- *Add your own*



Aligning the Counseling Program

- *“How can my counseling program best support your school improvement goals?”*
- *“Where do you see the biggest opportunity for the counseling program to have more impact?”*
- *“Are there areas where you wish the student support team was more involved?”*
- *“What would it look like if our program was fully supporting what you’re trying to accomplish?”*
- *Add your own*



Sharing Data & Impact

- *“Would it be helpful if I shared a brief monthly update on what our program is seeing in terms of student needs and outcomes?”*
- *“Here’s something I’ve noticed in the data – I wanted to get your perspective on it.”*
- *“We’ve made some progress on [specific outcome]. I’d love five minutes to walk you through it.”*
- *“I’ve been tracking [attendance / behavior / academic indicator] for some students I’ve been working with. Can I share what I’m seeing?”*
- *Add your own*



Clarifying Expectations

- *“Can we talk about how my time is best used? I want to make sure I’m where you need me most.”*
- *“When there’s a conflict between a counseling request and an administrative task, how would you like me to handle that?”*
- *“Are there situations where you’d want me to come to you first before taking action?”*
- *“Could we talk about how implementing my counseling standards help students succeed?”*
- *“What does a great school counseling program look like to you?”*
- *Add your own*

 Asking for Feedback

- *“Is there anything I could do differently that would make your job easier?”*
- *“I want to grow this year – what’s one thing you think I could work on?”*
- *“How am I doing in terms of keeping you informed and in the loop?”*
- *“Is there anything about my program or approach that you’d want to see change?”*
- *Add your own*

 Solving Problems Together

- *“I’m dealing with a situation and I wanted your perspective before I move forward.”*
- *“I have a challenge I’m working through – I’ve thought of two possible approaches. Can I run them by you?”*
- *“Here’s what I’ve tried so far. Here’s what I think would help. What do you think?”*
- *“I want to make sure we’re aligned on this before I communicate it to students or families.”*
- *Add your own*

REMEMBER *The goal of these questions isn’t to impress – it’s to genuinely understand. Trust builds when others are curious about their reality, not just advocating for their own purposes.*

HANDOUT 4

Counseling Program Impact Dashboard

Connecting what we do to what school administrators care about

School Year: _____ School Counselor: _____

Reporting Period: ☐ Monthly ☐ Quarterly ☐ Semester ☐ Annual

Academic Achievement

Metric	Baseline / Last Period	Current Period	Change	Notes
% students on track to graduate				
% students passing core courses				
AP / advanced course enrollment				
Students supported with academic interventions				
Credit recovery participants				

Highlight: _____

Attendance

Metric	Baseline / Last Period	Current Period	Change	Notes
Chronic absenteeism rate (school-wide)				
Chronic absenteeism rate (caseload)				
Students with improved attendance after counselor contact				
Attendance-related family conferences held				

Highlight: _____

Behavior & Discipline

Metric	Baseline / Last Period	Current Period	Change	Notes
Office referrals (school-wide)				
Suspension rate				
Students with behavior plans supported by counselor				
Restorative conversations facilitated				

Highlight: _____

College & Career Readiness

Metric	Baseline / Last Period	Current Period	Change	Notes
% seniors with completed college applications				
FAFSA completion rate				
SAT / PSAT participation rate				
Students with post-secondary plans documented				
Career exploration activities completed				

Highlight: _____

Student Support Services

Metric	This Period	Notes
Individual counseling sessions		
Small group sessions (# sessions / # students)		
Classroom lessons delivered		
Referrals made to outside services		
Crisis interventions		
Family / caregiver contacts		
Consultations with teachers		

Total students directly served this period: _____

Connection to School Improvement Plan

For each goal on your school's improvement plan, note how the counseling program contributed:

School Improvement Goal	Counseling Program Contribution	Evidence

This Period's Wins

- _____
- _____
- _____

Next Period's Focus

- _____
- _____

Where I Need Support

Use this dashboard at recurring principal/counselor meetings to connect counseling program activities to shared goals for student success. Over time school counselor evaluations become easier to navigate and more aligned to the work of a comprehensive school counseling program.

HANDOUT 5

My 30-Day Principal/Counselor Relationship-Building Challenge

Small, consistent actions build lasting influence.

School Administrator's name: _____

School Counselor's name: _____

The one thing I most want to improve in this relationship: _____

Week 1: Learn & Listen

Action	Done
Ask: "What are your top three priorities this year?"	☐
Ask: "What is keeping you awake at night right now?"	☐
Review your school's improvement plan and identify where the counseling program connects	☐
Write down three ways the counseling work supports the school's stated goals	☐

Notes: _____

Week 1 Reflection: What surprised you? What do you understand better now?

Week 2: Connect & Communicate

Action	Done
Schedule a recurring meeting (even if it's just once per quarter)	☐
Send a brief update – one win, one upcoming event, no ask needed	☐
Share one data point that connects school counseling work to student outcomes	☐
Discuss and complete the Annual Administrator Conference document	☐

Notes: _____

Week 2 Reflection: How did your administrator respond? What felt different?

Week 3: Demonstrate Impact

Action	Done
Celebrate a student or counseling program success with your school staff – formally or informally	☐
Bring a challenge to your principal/counselor with two possible solutions already identified	☐
Connect an upcoming initiative directly to the school improvement plan in a conversation	☐
Ask: “How can the counseling program best support [<i>name a goal</i>] this quarter?”	☐

Notes:

Week 3 Reflection: What is getting easier? Where do you still feel stuck?

Week 4: Deepen & Sustain

Action	Done
Ask for feedback: “Is there anything I could do differently that would make your job easier?”	☐
Clarify one assumption/expectation about your role or the use of your time	☐
Identify one way the principal can get involved in a counseling program activity or celebration	☐
Reflect together: What has shifted in our working relationship over the past 30 days?	☐

Notes:

Week 4 Reflection: What will you commit to doing consistently going forward?

MY 30-DAY COMMITMENT

By the end of this month, I will have taken at least ____ of these actions.

The one I am most committed to is: _____

I’ll know it’s working when: _____

Signed: _____ Date: _____