School meeting preparation toolkit

A practical workbook for parents and caregivers to prepare for a school conversation, keep clear notes, and follow through afterward.

You know things about your child that the school team needs to hear. You do not need perfect words or a complete answer before you begin. Use the pages that help, skip what does not fit, and bring a few specific examples.

How to use these eight pages

Before the meeting: capture strengths and your child's perspective on page 2, separate observations from possible explanations on page 3, and choose your priorities on page 4. Use page 5 to shape the conversation. Page 6 shows a fictional example. Bring pages 7 and 8 for notes and follow-up.

Already completed the free one-page worksheet? Keep it as your quick overview. Use this toolkit when you want more room for examples, questions, agreed actions, and review notes.

Child or initials and parent or caregiver

Meeting date and time | Location or link | School contact

What would make this conversation useful for our family

A few practical limits

This is a preparation and communication tool, not legal, medical, diagnostic, or educational-placement advice. It does not determine eligibility, replace school procedures, or guarantee services or outcomes. For a formal process, ask the school about applicable procedures and deadlines, and seek qualified local advice when needed. Keep completed pages private and share only what is relevant.

Begin with your child

Start with a fuller picture of your child, including what they enjoy, what they can do, and what helps them feel understood. Your child can contribute in words, drawings, a message, or another comfortable way.

Strengths and interests we want the team to know

Think about curiosity, friendships, humor, persistence, creativity, or a favorite activity.

When school or learning feels easier

What is happening around them? Who is there? What kind of task or support helps?

My child wants adults to understand

Use their own words when possible. Mark a paraphrase as a paraphrase. They may choose not to answer.

What my child is comfortable sharing at the meeting

Ask what may be shared, how, and by whom. Note anything they want kept private.

If your child cannot or does not want to contribute directly, describe what you have noticed without presenting your interpretation as their opinion.

Describe what you notice

Specific examples make it easier to ask useful questions. An observation is what you saw, heard, or recorded. An interpretation is a possible explanation. Keep both, but label them clearly.

Observation 1

Date or time period | Setting | Source

What happened and how it affected the task or day

Exact words or work sample to bring and source

Possible explanation and what we need to check

Observation 2

Date or time period | Setting | Source

What happened and how it affected the task or day

Exact words or work sample to bring and source

Possible explanation and what we need to check

A pattern matters more than a label. Note occasions when the concern did not occur, too. Share selected, relevant examples rather than every private family detail.

Choose your priorities

Choose up to three concerns for this meeting. A clear priority includes the impact on your child and a question or next step you want to discuss. It can be okay to leave other topics for another conversation.

Priority 1

The concern and why it matters to my child

One example and a question or change to discuss

Priority 2

The concern and why it matters to my child

One example and a question or change to discuss

Priority 3

The concern and why it matters to my child

One example and a question or change to discuss

Our most important starting point if time is short

Keep proposed supports open for discussion. You can ask what has been tried, what the school can offer, and how everyone would know whether a change is helping.

Plan the conversation

Bring a short agenda, not a script you must get exactly right. If time is limited, start with your main priority and leave time to confirm the next steps.

Questions you can adapt

What are you noticing, and in which situations?
What is already helping? What has been tried, for how long, and what happened?
What information are we missing before deciding on a next step?
What support or approach could we discuss, and who would coordinate it?
How will we check progress, and when will we talk again?

The three questions I most want answered

A simple agenda

Conversation	My notes or time to allow
Strengths and child perspective	
Priority concern and examples	
School perspective and possible next steps	
Decisions, owners, dates, and review	

What would help me take part fully

For example: an agenda beforehand, an interpreter, accessible materials, a support person, or a pause. Ask the school what is available and how to arrange it.

Useful words: "Could you explain that in everyday language?" "Can we pause while I write that down?" "Is that a proposal, or something we have agreed to do?"

A fictional worked example

This invented example shows how to organize a conversation. Alex, the caregiver, the school, and all details below are fictional. It is not a case study, a recommended intervention, or a prediction of any legal or school outcome.

Start with strengths and the child voice

Alex, age 10, enjoys science, explains ideas clearly out loud, and likes helping younger children. Alex says, "I know what I want to say, but starting a whole page feels too big." The caregiver asks permission to share that sentence at the meeting.

Separate the observation from the interpretation

Observation: During three homework sessions last week, Alex talked through an answer but did not begin writing for about 15 minutes. On one evening, Alex began after the caregiver asked for just the first sentence. The caregiver brings one dated work sample.
Possible explanation: Starting the task may feel difficult. This is a question to explore, not a conclusion about ability, motivation, or a diagnosis.

Name the priority and ask a question

Priority: Understand what makes starting written work difficult and discuss a manageable next step.
Question: "Do you see the same pattern in class? What helps Alex get started, and what information should we compare?"

Record only what was actually agreed

Fictional agreed action	Owner	Date
Note how Alex starts two classroom writing tasks, including context.	Teacher	Nov 18
Bring two brief homework observations, including one easier start.	Caregiver	Nov 18
Compare observations and discuss a possible next step.	Teacher and caregiver	Nov 20

Still open: Whether a particular support is appropriate. No service, eligibility decision, diagnosis, or outcome has been promised.

Fictional dates and actions. Confirm actual dates, owners, and agreements in your own meeting.

Meeting notes and agreed actions

Use this page during the conversation. Keep your own notes, and ask how any school-prepared record will be shared. These notes are not a replacement for an official school record.

Date | Participants and roles | Note taker

What we learned and where perspectives were different

Record key facts, useful explanations, and information still to be checked.

Agreed actions

Confirm each action, owner, and date. Keep unconfirmed ideas in the next section.

Action agreed	Owner	Due date	How we will check

Proposals not yet agreed and unanswered questions

Next check-in date | Contact person | How we will connect

Before leaving, read the action list back: "Have I captured this accurately? Is anything missing, and who will share the written summary?" Ask about the next step for any disagreement or unresolved formal request.

Follow through and review

Choose a manageable time to check your notes. A brief, accurate summary can help everyone remember the same next steps. Track what happened before deciding what to discuss next.

Follow-up tracker

Action or question	Due date	Update or response	Next step

A short follow-up message to adapt

Thank you for meeting on [date] to discuss [topic]. My understanding is that [person] will [agreed action] by [date], and we will review [information or progress] on [date]. We still need to clarify [open question]. Please let me know if I have misunderstood or missed anything. Thank you, [name].

Use your own words and only confirmed details. Check the recipients and remove private information they do not need. This template does not submit a formal request or preserve a legal deadline by itself.

What changed for my child and what evidence do we have

Include what improved, stayed difficult, or was different from what we expected.

What we want to ask or adjust at the next check-in

When more help is needed

If an agreed date passes, ask your contact for an update and a new date. Use school or emergency channels for urgent safety concerns. For rights, evaluations, services, or deadlines, consult current school procedures and a qualified local professional. This is not legal advice and does not guarantee outcomes.