Caregiver Engagement Meeting Guide

## Overview

This guide helps educators hold productive meetings with caregivers to foster a supportive, inclusive environment for student success. It is drawn from the practices at **Van Buskirk Elementary School** (AZ).

**Who this is for:** All staff on a student’s support team, including teachers, school leaders, and support specialists (e.g., special education teachers or counselors).

**When to use it:** For ongoing caregiver-teacher conferences throughout the year, and as-needed meetings to address priority student issues. Conferences typically start two to three months into the school year when teachers have baseline data to share. Schools should meet all parents during the first semester, and then prioritize students by tiers in the second semester.

**How to use it:** This is intended to enhance caregiver meetings, but it is just one part of a caregiver engagement strategy. It does not replace continuous communication and collaboration between caregivers and educators.

## Best Practices

An effective meeting should provide a comprehensive perspective on students' academic progress, identify areas in need of support, and set goals collaboratively with caregivers. To use this tool well, consider the following best practices:

* **Foundational relationships:** Start building relationships with caregivers by getting to know who they are and understanding their hopes and dreams for their students. Take time to build a relationship with your caregivers to establish trust, open communication, and collaboration.
* **Prioritization by need**: Prioritize meetings for students with urgent academic, behavioral, or social-emotional needs. This ensures that support resources are allocated efficiently, considering both the student’s level of intervention and their growth trajectory. Equal consideration is given to students who exhibit a lack of academic progress, regardless of their initial performance level. Students in Tier 3 interventions should have at least two meetings annually.
* **Transparent data:** Share data on student performance, behavior, and attendance to provide an objective understanding of the student’s current performance. Discuss strengths and areas for improvement, using evidence like student work samples compared to a grade-level sample, observations, and assessment results.
* **Explicit intervention tiers:** Determine the appropriate intervention tier for the student based on their needs: Tier 1 (whole-class strategies), Tier 2 (targeted interventions), or Tier 3 (intensive interventions). Explain what the different tiers represent and provide examples of what that means for their children.
* **Shared actions:** Ask caregivers to come to the meeting with hopes for their student. During the meeting, ground the discussion in their hopes, and solicit caregiver input on goals for the student and intervention strategies. Give caregivers concrete, accessible activities to do at home to support their child's learning.
* **Clear communication**: Communicate expectations to caregivers before the meeting, including what data will be discussed, what the meeting's goals are, and what outcomes are expected. After the meeting, summarize key takeaways to ensure that everyone is on the same page.

## Potential Outcomes

Caregivers are some of our most valued—and often underutilized—resources. Done well, meetings can draw on caregiver knowledge of their child, build their involvement, and ensure that each student gets continuous personal support.

* **Involved caregivers**: Caregivers feel included and valued and have opportunities to support student success. They are more comfortable communicating with teachers and supporting learning at home.
* **Data-driven decisions**: Both educators and caregivers grow more comfortable discussing and using student data. They rely on objective evidence to identify areas of improvement, set goals, and monitor progress.
* **Personalized support:** Because they draw on student intervention tiers and shared actions during meetings, strategies are more tailored to the student’s specific needs. Educators and caregivers follow up regularly to ensure continuous support.

# Caregiver Meeting Protocol

The protocol has three sections: (1) Pre-Meeting Preparation, (2) Meeting Agenda, and (3) Caregiver Follow-up.

## 1. Pre-Meeting Preparation

Take all the steps below before the meeting to create a structured meeting agenda (section 2). Preparation, typically done the week of the meeting, is led by any classroom teacher. This meeting template can be used at the beginning of the school year to build trust with caregivers and get them invested early in the school year; when a teacher has identified an academic concern about a student; or to provide progress updates on student growth throughout the year.

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| **Prep Step** | **Details** | **Pro Tip** |
| **Define participants** | Identify any professionals, such as special education teachers or school counselors, who should attend. Confirm the caregivers’ desired language in advance and engage translators if needed. | Ensure all meeting participants understand the purpose and goals and can describe the student’s performance prior to the meeting. |
| **Set the meeting purpose** | What are the academic concerns, behavior issues, or social-emotional needs? The meeting should focus on the most urgent student needs and tie to the school’s priorities. | Teachers should consult with additional staff who have expertise in the areas of concern (e.g. behavior, academics) |
| **Gather student performance data** | Gather relevant data, including assessments, progress reports, and observations. Include student work that illustrates student performance concerns and examples of grade-level performance for comparison to help caregivers understand the gap. Use visual displays, such as graphs or charts, to help caregivers absorb info. Gather information unique to the student, such as an individual education plan (IEP), language performance, and/or other supporting material to understand the student more deeply. | Avoid data overload. Typically, one summative assessment and two or three classroom formative assessments are enough. |
| **Assign intervention tiers** | Determine what tier of support the student needs: Tier 1 (whole-class strategies), Tier 2 (targeted interventions), or Tier 3 (intensive interventions). Prepare to explain exactly what this means for the student and the support strategies available for that tier. | Ensure any strategies are laser-focused on addressing the most pressing student needs. |
| **Draft an action plan** | Draft the bulk of the action plan prior to the meeting. It should outline interventions such as targeted small-group support during math instruction and support such as access to math manipulatives that will directly advance the goal for the student, and dates to review progress with caregivers. | Typically, the first progress review should happen in four to six weeks. |
| **Send a meeting invitation** | Notify the caregivers about the meeting, emphasizing the importance of their presence and offering scheduling flexibility. Give them a brief overview of what to expect and ask them to come to the meeting prepared to share their hopes for their child. | The invite can help set a collaborative tone. |

2. Caregiver Meeting Agenda

**Teacher Name:**

**Caregiver(s) / Contact Info:**

**Additional Participants:**

### Meeting Agenda

* **Introduction**

*Introduce attendees and state the meeting purpose.*

* + **Introductions:** Everyone introduces themselves and their roles supporting the student.
  + **Hopes:** Allow the caregivers to ask questions and share their hopes for their student.
* **Performance Review**

*Give caregivers an objective understanding of their student’s performance.*

* + **Data on progress:** Share where the student began the year and what progress has/has not happened, anchored with representative work samples.
  + **Strengths/opportunities:** Meetings can feel overwhelming or disheartening to caregivers if there is a lot of progress needed. Point out students’ strengths too.
* **Student Goal Setting**

*Set a goal to address the student’s challenges, referencing the hopes that caregivers shared.*

* + **Student goal:** Is this goal based on growth or performance? How do we measure it? How will we know if the student is on track to meet the goal?
  + **Collaborate with caregivers:** Encourage them to share their insights and suggestions on what the student needs. Do the goals align with their hopes for the student?
  + **Timeline:** When should this goal be reached? If it’s an end-of-year goal, include additional four- and six-week checkpoints.
* **Action Plan**

*Share the school’s approach to the tiered system of intervention and outline the details of the support the student will receive going forward. Define responsibilities for all parties involved.*

* **Student tier:** Explain the tier support *and* why it’s been chosen. Explain that performance *and* growth are considered (e.g., on grade level but not growing).
* **In-class:** What will happen during class time? Focus on what will be different and provide examples and what the caregiver will hear or see if these strategies are being used (e.g., homework or something that their student will say.)
* **Small group/out-of-class support:** What will happen outside of class and when? Will the student miss any instructional time? Note that missed class time does not automatically detract from the student’s academic experience.
* **Progress monitoring:** Set dates to review progress with caregivers (can be a formal meeting or a less-formal call). Agree on a preferred communication method.
* **Support at Home**

*Discuss how caregivers can support their child outside of school.*

* **At-home support plan:** Ask caregivers what they’re already doing and suggest simple actions they can take. Ensure they’re comfortable with any proposals.
* **Resources needed:** Does the caregiver require any resources to provide the support (e.g., technology or Wi-Fi access). Share options available from school.
* **Q&A/Concerns**

*Surface any lingering concerns or questions.*

* + **Questions/Concerns:** Ask, “How are you feeling with all that we spoke about? What questions do you still have?” Prompt directly for concerns. Provide an avenue to ask questions after the meeting, and schedule follow-ups if anything can’t be resolved.

## 3. Caregiver Follow-Up

It’s important that all meeting participants have a clear understanding of what to expect moving forward. The templates below outline the minimum recommended information for each caregiver communication.

**Meeting summary (within two days):** Send a follow-up email or letter to parents summarizing the key points within two days of the meeting.

**Progress monitoring (first update within four to six weeks):** Provide regular updates to parents regarding their child's progress. Share data and evidence of growth or areas needing improvement. Use this communication as an opportunity to maintain an open line of dialogue with caregivers.

**Adjustments and modifications (as needed):** If necessary, revise the action plan based on the student’s progress and evolving needs. Collaborate with parents to make any necessary adjustments.

### Follow-up post-meeting

* **Meeting Summary**

Emailed to all participants on: XX/XX

* + Data progress:
  + Strengths:
  + Opportunities:
  + Intervention strategies and action plan:
  + At-home support agreed upon:
* **Progress Monitoring**

Check point 1:

* + Date:
  + Data to be reviewed:
  + Recommendations:

Check point 2:

* + Date:
  + Data to be reviewed:
  + Recommendations:

Check point 3:

* + Date:
  + Data to be reviewed:
  + Recommendations:
* **Adjustments and/or Modifications**
  + Adjustment/modification:
  + Communicated with stakeholders:

Caregiver Meeting: In Action  
This is a fictional composite of caregiver meetings in Van Buskirk Elementary School.  
  
**Background:** Ms. Johnson, a fifth-grade math teacher, has a student (Emily) who is struggling with fractions and decimals. Ms. Johnson has already tried reteaching strategies and is now calling for a caregiver meeting. Emily is currently receiving Tier 2 intervention support but has seen minimal progress to date.

**Participants:** Ms. Johnson (Emily’s teacher), the school principal, the math interventionist, and Emily’s caregiver.

### Pre-Meeting Preparation

Ms. Johnson and the other meeting participants meet the week of the meeting to plan it.

* **Purpose**: The principal connects the meeting back to school priorities: ensuring that all students have foundational math skills and meet grade-level expectations.
* **Data**: Together, the group looks at Emily’s weekly formative assessments, student work, and curriculum-based assessments to evaluate Emily’s gaps in understanding. Ms. Johnson shares anecdotal observations.
* **Intervention tiers**: The team decides that Emily will continue to fall into Tier 2: targeted intervention. The lack of progress in Tier 2 is a significant concern, and they prioritize Emily’s caregiver meeting over other potential meetings.
* **Meeting invitation**: After sending the invite, Ms. Johnson follows up with a call to ensure Emily’s caregivers have received it and understand the meeting’s significance.

### Caregiver Meeting

The team meets with Emily’s caregivers in Ms. Johson’s classroom, where Emily’s work is displayed.

**Introduction**: Emily’s caregivers take a moment to see Emily’s work showcased and appreciate her progress. Emily’s caregivers share their hopes and goals for Emily this year.

**Performance review**: Prior to speaking about evidence in the classroom, Ms. Johnson asks Emily’s caregivers to reflect on the areas of strengths and opportunities they have observed and probes for trends and or improvements Emily has demonstrated over the course of the year. Where does Emily share that she is successful? Are there opportunities you have seen, or that Emily has shared with you? Ms. Johnson walks Emily’s caregivers through the following data:

* **Strengths/areas of improvement:** Ms. Johnson stresses that Emily is great at participating in class discussions. Together they discuss her challenges with fractions and decimals in detail.
* **Trends over time:** A graph of weekly formative assessments shows that Emily’s performance on fractions and decimals has been consistently below grade-level expectations.
* **Unit assessment results:** This zooms in on fractions and decimals and shows that Emily struggles with key concepts such as identifying equivalent fractions and comparing decimals.
* **Work samples:** Emily’s completed assignment and one on grade level, for comparison. They discuss where Emily is excelling and where she needs to grow to meet grade-level expectations.

**Student goal setting**: Ms. Johnson actively involves Emily’s caregivers in a discussion to establish specific goals for their child. Together, they set collaborative goals for Emily in fractions and decimals, including:

* Caregivers can provide insights into Emily’s learning style, preferences, and areas of interest. They can also suggest strategies that work well when supporting her at home.
* Increase accuracy in fraction operations: Emily will work towards accurately adding and subtracting fractions with different denominators, as well as multiplying and dividing fractions.
* Metric: 80 percent accuracy in practice assessments.
* Improve decimal place value understanding: Emily will develop a strong understanding of decimal place value, including the ability to compare and order decimals accurately.
* Metric: Ordering a set of decimals from least to greatest with 90 percent accuracy. These metrics will be measured through regular quizzes, practice assignments, and in-class observations.

**Action plan:** Based on the goals, Ms. Johnson works with Emily’s caregivers to create an action plan, including:

* **Intervention strategies**: Ms. Johnson explains the tiers and that Emily would benefit from Tier 2 interventions, including small-group instruction (in-class groupings for extra support), manipulatives (like fraction bars), and scaffolded practice (activities that break down fractions into simpler steps).
* **In-class support**: Emily will receive targeted scaffolded instruction in a small group with use of manipulatives, and Ms. Johnson will assess Emily’s progress through formative assessments.
* **Progress monitoring**: Ms. Johnson and Emily’s caregivers agree to formal check-ins every three weeks to review progress. The math interventionist will check in with Ms. Johnson at the two- and four-week marks to review progress and identify whether additional support is needed.
* **Roles and responsibilities:** Ms. Johnson will be responsible for implementing Tier 2 interventions, including small-group and scaffolded practice. Emily’s caregivers will support her at home by reinforcing concepts and completion of assigned practice tasks. Progress monitoring by Ms. Johnson will include regular check-ins with Emily’s caregivers.

**Caregiver follow-up:** Ms. Johnson establishes ongoing communication with Emily’s caregivers by sharing her email address, encouraging open dialogue, and fostering a strong caregiver-teacher partnership.

# Sample Caregiver Meeting Invitations

Below is an invite template, which can be customized, for caregiver meetings. Here's what the template does well.

* **Tone:** The tone is friendly and welcoming, framing the meeting in terms of improvement and confidence.
* **Date, time, and location:** The meeting details are clear, with options for scheduling flexibility.
* **Purpose:** The email gives a concise overview of what caregivers can expect during the meeting.
* **Collaboration:** The email underscores the importance of caregiver involvement in their child’s education.

## Subject: Join us to Discuss Your Child’s Progress in Fractions and Decimals!

Dear [Caregiver Name],

I hope this email finds you and your family in good health. I wanted to take a moment to invite you to an important meeting where we can talk about your child’s progress in fractions and decimals. As your child’s math teacher, I’m looking forward to us working together to support their learning and success in this subject.

**Meeting Details:** Date: [Insert Date] Time: [Insert Time] Location: [Insert Location]

During this meeting, we will have the opportunity to review how your child is doing in fractions and decimals and to explore ways to help them improve and feel more confident. Here’s what we plan to cover:

* **Getting to know each other and setting goals:** We’ll start by introducing ourselves and clarifying the purpose of the meeting. Together, we’ll discuss the goals we have for your child and make sure we’re all on the same page.
* **Checking progress and celebrating success:** I’ll share examples of your child’s work, assessments, and observations to give you a clear picture of their current performance. We’ll also talk about the areas where they are doing well and celebrate their achievements.
* **Strategies to help your child:** I’ll share different approaches and activities we can use to support your child’s learning in fractions and decimals. These strategies will be personalized to fit your child’s needs and learning style.
* **Setting goals together:** We’ll work as a team to set specific goals for your child in fractions and decimals. Your input is incredibly valuable, and we want to make sure we consider your thoughts and ideas in this process.
* **Making a plan:** Based on our discussions and goals, we’ll create a plan that outlines the steps we’ll take to help your child achieve those goals. We’ll also talk about how we can support them at home, and I’ll provide you with some resources and ideas to assist you.
* **Your questions and concerns:** We’ll reserve time for you to ask any questions, seek clarification, or share any concerns you may have. I’m here to address your inquiries and provide guidance or additional resources if needed.

**Follow-Up Communication:** To ensure effective communication, I encourage you to reach out with any questions or concerns. My email is [Your Email]. My direct line is [Your Phone]. Open lines of communication are essential, and I’m available to support you in any way possible. This meeting is just one step in an ongoing partnership to foster your child’s growth and development.

Your presence at this meeting is highly valued and appreciated. Your involvement in your child’s education makes a significant difference, and together, we can create the best learning environment for them. If the scheduled meeting time doesn’t work for you, please let me know, and we can find an alternative time that suits both of us.

Thank you for your continued support and partnership in your child’s education. I’m excited to meet with you and discuss your child’s progress in fractions and decimals. If you have any questions before the meeting, please don’t hesitate to reach out to me.

Warm regards,

[Your Name] [Your Title/Role] [School Name]

**Spanish Version**

## Asunto: ¡Únase a nosotros para hablar sobre el progreso de su hijo en fracciones y decimales!

Estimado [Nombre del padre/madre/tutor],

Espero que este correo electrónico los encuentre a usted y a su familia con buena salud. Quería tomarme un momento para invitarlo a una reunión importante donde podemos hablar sobre el progreso de su hijo en fracciones y decimales. Como la maestra de matemáticas de su hijo, espero que trabajemos juntos para apoyar su aprendizaje y éxito en esta materia.

**Detalles de la reunión:** Fecha: [Insertar fecha] Hora: [Insertar hora] Ubicación: [Insertar ubicación]

Durante esta reunión, tendremos la oportunidad de revisar cómo le está yendo a su hijo en fracciones y decimales, y explorar formas de ayudarlo a mejorar y sentirse más seguro. Esto es lo que planeamos cubrir:

* **Conociéndonos unos a otros y estableciendo metas**: Comenzaremos presentándonos y aclarando el propósito de la reunión. Juntos, discutiremos las metas que tenemos para su hijo y nos aseguraremos de que todos estemos en la misma página.
* **Comprobación del progreso y celebración del éxito:** Compartiré ejemplos del trabajo, las evaluaciones y las observaciones de su hijo para darle una idea clara de su desempeño actual. También hablaremos sobre las áreas en las que les está yendo bien y celebraremos sus logros.
* **Estrategias para ayudar a su hijo:** Compartiré diferentes enfoques y actividades que podemos usar para apoyar el aprendizaje de fracciones y decimales de su hijo. Estas estrategias se personalizarán para adaptarse a las necesidades y el estilo de aprendizaje de su hijo.
* **Establecer metas juntos**: trabajaremos en equipo para establecer metas específicas para su hijo en fracciones y decimales. Su aporte es increíblemente valioso y queremos asegurarnos de que consideramos sus pensamientos e ideas en este proceso.
* **Elaboración de un plan:** Con base en nuestras discusiones y objetivos, crearemos un plan que describa los pasos que tomaremos para ayudar a su hijo a lograr esos objetivos. También hablaremos sobre cómo podemos apoyarlos en casa y les proporcionaré algunos recursos e ideas para ayudarlos.
* **Sus preguntas e inquietudes:** reservaremos tiempo para que haga cualquier pregunta, busque aclaraciones o comparta cualquier inquietud que pueda tener. Estoy aquí para atender sus consultas y proporcionar orientación o recursos adicionales si es necesario.

**Comunicación de seguimiento:** Para asegurar una comunicación efectiva, les animo a que se pongan en contacto con cualquier pregunta o inquietud. Mi correo electrónico es [Su correo electrónico]. Mi línea directa es [Su numero]. Las líneas de comunicación abiertas son esenciales, y estoy disponible para apoyarles de cualquier manera posible. Por favor, tengan en cuenta que esta reunión es solo un paso en una asociación continua para fomentar el crecimiento y desarrollo de su hijo/a.

Su presencia en esta reunión es muy valorada y apreciada. Su participación en la educación de su hijo marca una diferencia significativa y, juntos, podemos crear el mejor ambiente de aprendizaje para ellos. Si la hora de la reunión programada no funciona para usted, hágamelo saber y podemos encontrar una hora alternativa que nos convenga a ambos.

Gracias por su continuo apoyo y colaboración en la educación de su hijo. Estoy emocionado de reunirme con usted y hablar sobre el progreso de su hijo en fracciones y decimales. Si tiene alguna pregunta antes de la reunión, no dude en comunicarse conmigo.

Un cordial saludo,

[Su nombre] [Su cargo/función] [Nombre de la escuela]

# Caregiver Meeting Note-Taking Template

**Teacher Name:**

**Caregiver(s) / Contact Info:**

**Additional Participants:**

### Meeting Agenda

* **Introduction**

*Introduce attendees and state the meeting purpose.*

* **Meeting objective**:
* **Caregiver’s hopes for student**: **Performance Review**
* **Performance Review**

*Give caregivers an objective understanding of their student’s performance.*

* + **Data on progress**:
  + **Strengths:**
  + **Opportunities:**
* **Student Goal Setting**

*Set a goal to address the student’s challenges, referencing the hopes that caregivers shared.*

* + **Student goal:**
  + **Timeline:**
* **Action Plan**

*Share the school’s approach to the tiered system of intervention and outline the details of the support the student will receive going forward.*

* + **Student tier:**
* **In-class:**
  + - Owner:
* **Small group/out-of-class support:**
  + - Owner:
* **Progress monitoring:**
  + - Owner:
* **Support at Home**

*Discuss how caregivers can support their child outside of school.*

* **At-home support plan:**
* **Resources needed:**
* **Q&A/Concerns**

*Surface any lingering concerns or questions.*

* + **Questions/concerns:**
    - **Follow-up needed? If yes, by whom?**

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