

TRANSITION MEETINGS GUIDANCE FOR TEAMS

Transitions between schools—such as elementary to middle school, middle to high school, or between districts—are critical moments for students.

For students receiving social-emotional, behavioral, or mental health support, these transitions can impact:

- continuity of care
- sense of safety and belonging
- academic and social success

Transition meetings help ensure that supports don't start over—they continue. When done thoughtfully, these meetings allow receiving schools to build on what is already working, rather than starting from scratch.

GUIDING PRINCIPLES

Focus on support, not labels
Prioritize student dignity and confidentiality
Share information that is relevant and actionable
Collaborate to ensure a smooth and supportive transition

WHAT TO SHARE

Focus on information that helps the receiving school support the student:

Strengths and interests
Effective strategies and supports
Current accommodations or interventions
Relevant school-based needs

WHAT NOT TO SHARE

To protect student dignity and confidentiality, avoid:

Unnecessary personal or family details
Subjective opinions or labels
Information not relevant to school success
Sensitive details that are not required for support

STUDENT INFORMATION

NAME:

DATE OF BIRTH:

CURRENT SCHOOL:

CURRENT GRADE:

RECEIVING SCHOOL:

NEXT GRADE:

MEETING DETAILS:

DATE:

PARTICIPANTS & ROLE:

STUDENT STRENGTHS & INTERESTS

What helps this student feel successful, connected, and engaged?

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

CURRENT SUPPORTS & SERVICES

What is currently in place?

Social-emotional supports:

Academic supports:

Behavioral supports:

Attendance supports:

Formal plans:

- IEP*
- 504*
- BIP*

Other:

EFFECTIVE STRATEGIES

What has worked well for this student?

[Empty text box for effective strategies]

AREAS OF NEED/POTENTIAL BARRIERS

What challenges may impact the student?

[Empty text box for areas of need/potential barriers]

RECOMMENDATIONS FOR RECEIVING SCHOOL:

What should be considered or implemented to support the student?

[Empty text box for recommendations for receiving school]

FAMILY COMMUNICATION

What should be considered or implemented to support the student?

Parent/guardian aware of transition meeting

Yes No

Preferred communication method:

phone call

email

text

Key considerations for family engagement:

[Empty text box for key considerations for family engagement]

ADDITIONAL CONSIDERATIONS

(Only include information that is relevant to supporting the student in school)

Safety considerations:

[Empty text box for safety considerations]

Mental health considerations

[Empty text box for mental health considerations]

FOLLOW UP PLAN

What should be considered or implemented to support the student?

WHO WILL FOLLOW UP WITH RECEIVING SCHOOL?

[Empty text box for who will follow up with receiving school]

TIMELINE FOR FOLLOW-UP:

[Empty text box for timeline for follow-up]

ADDITIONAL MEETING NEEDED? YES NO