Communications worksheet

This section includes communication strategy worksheet and a blank template.

A **communications strategy** plays an integral role in keeping a project on task. Implementing a successful, strong communications strategy can feel overwhelming, but if a district dedicates time to developing a comprehensive communications strategy, staff, teachers, students, and parents will be on the same page, allowing for success from the start!

This appendix provides information and tools to help you develop a communications strategy for your district. The narrative section will walk you through the process for developing a strategy, but it is best understood as further explanation for how to complete the template provided in this appendix. We have included two versions of the template. The first version is a completed example template, while the second is blank.

We strongly recommend that you use the template and then organize your plan in a written document. This written document will be an internal document that helps everyone responsible for communications know what they should be doing and why.

Note: This resource was originally created as part of our [One-to-One Implementation Guide: Establishing Your District's One-to-One Technology Initiative](). *We have updated the document to help districts develop a district-wide communication strategy.*

Definitions

Throughout this document, we use some key terms common in communications practice. Understanding these terms will help you better understand this document. These terms are

Strategy: A communications strategy is a plan created by an organization to detail communications goals, audiences, and tactics.

Audience: An audience is the group of people you are trying to reach. For school districts, common audiences are students, teachers, parents, and staff. Ideally, make your audiences as specific as possible in order to increase the likelihood you will reach them successfully and, therefore, reach your communications goals. For example, students can be broken down into elementary, middle school, and high school groups. You can also further segment each of these groups (by school, for example) in order to better target your communications.

Tactic: A tactic is the communications method used to reach an audience.

Examples of tactics include newsletters, posters, social media posts, text messages, phone calls, and in-person meetings.

Channel: A channel is where a tactic is delivered or placed. Examples of channels include social media, radio, website, and email.

Collateral: Collateral is the materials you create for a chosen tactic. Examples of collateral include the text and image needed for a Facebook post, the script for a phone call, and the design for a poster.

Step 1: Goals

A strong communications strategy starts with developing goals. The ultimate goal would be a successful communications plan. As you think about your goals for your communications strategy, there are several questions you need to consider when formulating your goals and establishing a vision for your strategy:

What are you trying to do? What ambitious change you want to make?

What concrete steps will you take to achieve these goals?

Who makes your goals a reality?

Step 2: Context

Before you can design a communications strategy, you need to understand the context in which you are communicating. This requires you to look **internally at the school district's assets and challenges in terms of capacity to communicate as well as externally to understand what outside factors may impact your ability to communicate effectively.** Questions that can prompt your thinking about these factors are included in the template below.

Step 3: Strategic Choices

All strong communications strategies start with an **in-depth analysis of audiences.** Your first job is to precisely identify all of your audiences. Your audiences will include,

at the very least, students, parents, staff, and teachers. Once you have identified these audiences, you must think about what each audience cares about—what they value—and what barriers they may face. For each audience, think of the main theme, or the big picture, that you are trying to communicate. Then, you will develop messages that expand on that theme and can be used when you begin to make collateral.

Don't forget to share your success as part of your messaging. It is important for audiences to hear success stories to increase engagement and buy-in to what you are communicating. Use success stories to reinforce the "why" of your message.

We have done some thinking about each of the four main audiences that we identified for you. You should expand on or edit what is below to help it fit your own context.

Students What students need to know varies based on age.

Teachers Staff

Parents

When communicating with **elementary students,** you have to meet them where they are developmentally and physically. This means they will have more barriers to information. Consider how you can make information accessible to them. Collateral, for example, should be very picture-heavy to account for children who are not

yet strong readers. Channels will also be more restricted, as they will most likely not be on social media or have access to email. Their teacher is the best direct messenger. Teachers can also hand out tangible materials to students.

Middle and high school students have access to online apps, cellphones, and social media. They also have direct access to teachers, who can be used as messengers. However, in most cases, middle school and high schools rotate teachers so their individual schedules will look different. You need to identify the teacher(s) that meet with all students in order to ensure the messages are received.

Parents are unique, which means you will have to use multiple channels and messengers in order to ensure everyone receives the message. Parents are busy, often have children of multiple ages, and are being bombarded with information from not only the school district but other external organizations. You will need to be careful not to overwhelm parents with too much information while still making all information easily accessible to those who want more detail. The list of what parents need to know is long; your communications strategy should precisely list what parents need to know, when they need to know it, and the best way to present that information to reach the majority of parents. Spending time understanding who your parents are will help you develop the best tactics and channels to use in order to best communicate with them.

Teachers are a very diverse group representing many age groups. With that in mind, they also have different levels of knowledge and confidence when using resources available to them. Administrators have direct access to them at school, hopefully through well-established communication channels. Nonetheless, teachers should be engaged early and often. Teachers value feeling like they understand what is going on and that they have been heard by administrators. They also value their time, as it is limited during the school year. Remember, teachers serve as advocates and messengers daily with their students and parents. They should be a key part of your communications strategy in terms of receiving messages, but you should also consider what they need to serve in their role as messengers.

Staff needs to have a clear understanding of what their role will be in establishing a communications strategy. Similar to parents, this audience is diverse. First, identify the staff that will be involved directly with the communications strategy, and state what they will be responsible for. Once this is complete, you can identify the best way to reach them. Does your district have a strong email culture? Or is there a weekly meeting staff needs to attend? Identify the best channel based on the culture of the school. Also, decide who is the best messenger: is it a school leader or the head of communications? From there, you can decide on the best tactics.

Remember that once you know your audiences, you need to understand what their values and their barriers to information before you can develop themes and messages.

Step 4: Communications Activities

Once you know your audiences and have some basic messages, you need to determine your tactics, plot them on a timeline, and assign key tasks to people. You should also consider your budget for communications at this stage.

Tactics should be specific to audiences, meaning that some tactics will not reach all audiences as effectively. A tactic may also be the same across audiences but vary in the channel you use. For example, a communications checklist is one tactic, but you may distribute it via email to school leaders. Be aware that there should be several channels and tactics in place to distribute your communications strategy. Remember to look in your needs assessment data to see if you have any clues about the most responsive form of communication for your audiences.

examples of tactics

Newsletters can come in a variety of formats. They can be emailed, posted on websites, printed and sent home with students, or even mailed. Be specific on what the goal for each newsletter is. Keeping a newsletter to one to two pages will help make sure more people read it. Be consistent about when the newsletter comes out so the audience can expect them. For example, publish a newsletter on the first Monday of each month. *(Audience tip: Parents are often the main audience for newsletters.)*

Social media posts are a good place to provide important information in a short-form format. For example, you can post district news, showcase teachers, staff, and students, post important links, job postings, and highlight happenings within the district. You can embed videos and photos to help increase engagement. Similar to other online formats, keep posts short and sweet. Also, you can sometimes use the same content across different platforms. Instagram and Facebook allow you to post in both places at one time. Remember, though, that Twitter has character restrictions. *(Audience tip: This is a good tactic for parents, teachers, administrators, and older students who are on social media. This is only a good tactic if you have a substantial following on your social media accounts.)*

Video does not have to be professionally produced, but it does have to be specific to the goal and audience. A good rule is to keep an informational video under two minutes. Short and sweet is always good to ensure engagement and views. Also, when possible, include captions to increase accessibility. *(Audience tip: Depending on the channel (e.g., YouTube, embedded videos on your website or social media accounts), this tactic can be good for a variety of audiences, especially younger audiences.)*

Informational sessions, in-person or online meetings with constituents, allow a target audience to hear directly from school or district administrators and often provide a forum to answer questions. It is important to have a clear agenda or script in order to keep these sessions short and to the point. Because this tactic requires more time for the audience, it might be challenging to get 100% participation. Think about ways you can work with events already on the schedule to increase participation. *(Audience tip: This is a good tactic to use with all audiences, but students and teachers are easier to reach with informational sessions because they are already expected to be at school.)*

Printed materials could include flyers, posters, one-pagers, FAQs, waivers, letters, postcards, direct mail, etc. The benefit of adding printed materials is to allow a way to communicate without the possibility of clutter. When communicating through email or social media, we often miss the opportunity to reach our target audience because of the many other things that may come through those channels. *(Audience tip: This is a good tactic for teachers, students or parents. Teachers can use flyers a means to communicate to students. Sending parents postcards or letters home with their child are easy ways to get them engaged in student activities at school.)*

Along with tactics, you have to be strategic in the channels you choose, who you choose to target through those channels, and how you use those channels. For example, communicating to parents with a newsletter can be helpful through email and through printed materials, but the same channels may not be effective when targeting students. Remembering how each audience responses to each tactic and channel is essential to reach them effectively in your communications efforts.

examples of channels

Your **social media** accounts will only be successful if you dedicate time to them. If you want your social
media to be frequented by your audiences, you have to post regularly and create engaging, relevant
content. Examples of social media that school districts commonly use are Facebook, Twitter, YouTube,
and Instagram. Include images and video. Similar to email, short and sweet is best. *(Audience tip: This
is a good channel for parents, teachers, and older students who have social media accounts. Be aware not
everyone is on social media. This should not be the only channel you use to post updates.)*

If possible, **emails** should be segmented to reach specific stakeholders better. Short and
sweet is best, as
well as including visuals/graphics. Many will not read a wordy email. *(Audience tip: This is the
best channel
for teachers, parents, and high school students—if they have school-provided email
addresses.)*

Your website should serve as a centralized location for all important information that school audiences
will need to access. It is one of the most important channels because it is completely controlled by the
school district and allows for transparency. However, a bad website can create frustration and be a barrier
to communication. You should spend time annually to audit the district website to make sure information
is up-to-date and easily accessible to your audiences. *(Audience tip: This is a good channel for parents,
teachers, administrators, and older students.)*

Most school districts have access to **robocall or mass texting software**. Almost all adults (along with many high schoolers) have access to a cellphone or a landline. This channel is usually used for announcements related to weather and school emergencies. You should be mindful of the length of the message. *(Audience tip: This is a good channel for parents, teachers, administrators, and older students.)*

Social apps like GroupMe have become very popular as a means for communication with parents. These operate similarly to Facebook groups, in that they can be kept private, and allow for text, image, or video posts. If a district already uses a social app, it should consider how it can be leveraged for communications about general updates and crises. *(Audience tip: This is a good channel for parents, teachers, administrators, and older students.)*

Step 5: Measure Success

As with every plan, you need a way to know whether you are achieving your goals. Your measurement plan should **include both outputs and outcomes.** Outputs measure whether your specific tasks were completed. For example, did you receive feedback from the tactics you chose? Outcomes measure whether your desired changes took place. For example, measuring your metrics on your social platforms, email, and website will allow you to see what is successful for your audiences. Make sure you have output and outcomes specific to each audience.

Step 6: Final Considerations

Update your strategy at least once a year. A communications strategy is a living document, and you will need to revisit it at least once a year, if not more frequently. Take into account any changes to the initiative and if those need to be communicated to your audiences.

Communication Strategy Sample

We created this template based on the SMART CHART™ model from Spitfire Strategies. The SMART CHART will help you assess your strategic decisions and create a high-impact communications strategy. The example below focuses on an open house for a school who has K-12 students.

STEP ONE: GOALS

What are you trying to do? What is the big ambitious change you want to make? *Host an open house for all students, teachers, families, and staff* Overall Vision: 1. *Increase parents' participation in their childrens' education* 2. *Establish a connection with parents for a successful academic year* 3. *Increase parent, teacher, and student relationships*	

What concrete steps will you take to achieve these goals? *(Remember this template is for developing your communications strategy for this event or initiative. Your objectives should be specific to how you are going to communicate your to your audiences, not how you are going to execute the communications strategy. Also, know you are going to have multiple objectives.)* Objectives: 1. *SAMPLE: Create a communications strategy to establish trust and transparency with stakeholders* 2. *SAMPLE: Build capacity to communicate to our audiences* 3. *SAMPLE: Successfully measure results of communications strategy and make improvements*	

Who makes your objectives a reality? *Identify the key communicators for your objectives. Be specific. You should be naming individuals.* *EXAMPLE: The superintendent, a principal, head of communications, teachers*	

STEP TWO: CONTEXT

Understanding your assets and challenges on the front end will help you streamline communications once you define your audiences and tactics. Think about access to resources, staff time, etc. Think of this as a quick version of a SWOT analysis.

Internal Scan	**Assess your organization's assets and challenges from a capacity perspective. Consider all the things you control that may impact your communications efforts.** *What staff, resources, and tools do you have to use?*
External Scan	**Take stock of what's happening around you that will affect your communications strategy.** *Are there misconceptions or misinformation that might get in the way of your communication efforts? Are there time considerations or key events that you might need to factor into your strategy? Are there natural communication opportunities you can leverage to help advance your strategy?*

CHOICES

STEP THREE: STRATEGIC

AUDIENCE: Who are the people who can help you achieve your objectives? Be specific. *The "general public" is not an audience. You want to break down your audiences as much as possible so you ensure you are providing the exact information they need to know in order for you to reach your objectives. There is no limit on the number of audiences. For the purpose of this template, we are only identifying four: students, parents, staff, and teachers.*

Identify Audience	Students (Break this down by schools or grades. Strategies and tactics will look different for elementary vs. high school, etc.)	Parents (Break this down by school or grades.)	Staff (This should include specific individuals that will play a role in ensuring the registration is a success.)	Teachers (Break this down by school or grades. Expectations for teachers will be different depending on school and/or grade.)
Identify Core Concerns: *Determine what will compel the audience to move toward your objective. Think about this in terms of what the audience values and what will be barriers. Make sure you think about what your audience needs to know that they do not already know or what misconceptions they may have.*	**Example Values:** - *Quality resources available to students in their learning environment* - *The school environment - Quality teachers* - *Clear instructions* - *Clear expectations* **Example Barriers:** - *No support at home* - *No ability to get to the open house*	**Example Values:** - *Wanting their child to have access to the best education possible* - *Helping their child academically* **Example Barriers:** - *Not able to take off from work to attend the open house* - *Inability to get to the open house*	**Example Values:** - *Clear expectations* - *Professional development and training* **Example Barriers:** - *Lack of information* - *Poor internal communications* - *Lack of support and training*	**Example Values:** - *Clear expectations* - *Want to be a part of the process and be heard* - *Want students to have high-quality instructional materials* - *Professional development and training* **Example Barriers:** - *Lack of information* - *Poor internal communications* - *Lack of support and training*
Theme: *What is the big picture you are trying to convey to each specific audience?*	*Your education is important to us.*	*We are preparing your student/child for the future.*	*You are instrumental in getting students successfully registered for the next school year.*	*Teachers are essential to each student's success.*

<table>
<tr><td colspan="4">Message: Is your message based on the audience's core concerns? Does it overcome—not reinforce—their barrier? Is "the ask" in the audience's comfort zone? If not, does the offered benefit outweigh the risk? Does the message offer a vision or emphasize a personal reward? Does it convey hope toward success? Is it consistent with the theme throughout?</td></tr>
</table>

Attending will ensure the success of your education Your responsibilities/expectations	*Attending will help ensure the success of your student/child's education.* *Your responsibilities/ expectations*	*With your help, more children can get access to a high quality education.* *Your responsibilities/ expectations*	*With your help, more children can get access to a high-quality education.* *We need you in order to make this open house successful.* *Your responsibilities/ expectations*

STEP FOUR: COMMUNICATIONS ACTIVITIES

Your communications strategy starts coming together as you identify tactics, plot them on a timeline, and assign key tasks to the people who will help implement your strategy. Below are some example tactics. This list is not exhaustive.

Audience	Students	Parents	Staff	Teachers
Tactics	*Posters/flyers in schools* *Announcements from teachers and/or administration to the entire school* *Email of important dates/ info (for older students)* *Allow for a Zoom option for families' to schedule time with teachers*	*Email of important dates/info Social media posts* *Text messages* *Allow for a Zoom option for families to schedule time with teachers* *FAQ* *Postcard in the mail with QR code to website link about program* *Video about open house (website and/or email)*	*Posters/flyers in schools* *Email of important dates/info FAQ* *In-person meeting to discuss responsibilities and logistics*	*Poster/flyers in schools/teacher boxes* *Email of important dates/info FAQ* *Allow for a Zoom option for teachers to schedule time with families* *In-person meeting to discuss responsibilities and logistics*

Timing	*Identify the timeline for the tactics that you identified. Remember, parents care about the success of their student's education and safety. In this example, the timeline should be before or at the very beginning of the school year to help establish relationships with families. You need to have communications tactics for each of these phases.*
Assignme nts	*Who is responsible for each tactic? In some cases, it might be more than one person. Make sure everyone is aware of their responsibilities.*
Budget	*How much will each tactic cost? Think printing costs, social media ads, time to produce materials, etc. You want to make sure you can execute your strategy within the budget you are provided.*

STEP FIVE: MEASUREMENT OF SUCCESS

The measures of success should be a mixture of outputs and outcomes. Think of outputs as measures of your efforts—the things you are doing to move your strategy forward. Outputs can include generating a specific number of email or text messages to parents, creating a video message from your superintendent for your website, or writing a student handbook. Outcomes are the changes that occur because of these outputs. If you generate a specific number of emails and text messages to parents, it is more likely they will attend the event. The purpose of your communications strategy is to ensure that your messages are getting to the right audiences and that those audiences are doing what you want. Below are some examples. This list is not exhaustive.

Audience	**Students**	**Parents**	**Staff**	**Teachers**
Outputs—Thes e need to be very specific, including numbers/metric s.	*The number of students that attended the open house* *Students received more information about their classes and their teachers.*	*The number of parents that attended the open house* *Parents received information about their student's classes and their teachers.*	*Send one email to all staff with specific responsibilities and schedule for the open house.*	*Send one email to all teachers with specific information regarding the open house.* *Give teachers a detailed checklist and guidelines for what to expect for open house.* *Train teachers on how to approach those who opt for a Zoom option*
Outcomes	*Students will be able to establish a connection with their teacher.*	*Parents will be able to have a connection with their child's teacher and administration.*	*Staff members will be able to ensure student success.*	*Teachers will be able to foster connections with students and parents*

STEP SIX: FINAL REALITY CHECK

Is the strategy doable?

Are your choices consistent? Does the logic flow from one box to the next? (Tip: Try testing your decisions backward—i.e., by accomplishing these tactics using these messengers, we will deliver these messages, supporting this theme, tapping into these values, moving this target audience, and so forth. Does the logic work as well in reverse as it did when you worked through Smart Chart 3.0? By going backward, you are more likely to recognize faulty logic or disconnect between decisions and steps. If the logic doesn't work in reverse, go back and address the trouble spots.)

Are you motivating the right people to take the right action at the right time?

Are there any assumptions or guesses built into the strategy that require further research to confirm or correct?

Will the tactics move you toward your objective? Will they reach the appropriate audience(s)?

Are you using the best persuasion practices, such as respecting the audience's lifestyle, sharing hope, making them the hero, positioning the issue within the social norm, and so forth?

Are there other objectives you need to add to the Smart Chart? Be sure you're taking a comprehensive approach to meeting your overall goals.

Is there buy-in from your organization to implement the strategy?

Can you measure progress?

If you answered YES to all these questions, you are ready to get to work! If you answered NO, go back and find your weaknesses in your strategy and update.