

Ten Tips to Help Plan Your Next Community Engagement Project

Since 2002, **School Perceptions** has conducted more than 400 community engagement projects, helping school districts and government organizations navigate the strategic planning, budgeting and referendum planning process. We have learned what works and where organizations stumble. Based on our experience, we have assembled 10 tips for you to consider before your next community engagement project.

Tip 1: Define and communicate your district’s most pressing needs using words that grandma can understand.

Early in the planning process, your administration must define the district’s most pressing needs. Nowadays, districts have many needs which may include: operational funding, technology, facility upgrades or maintenance. Consequently, it may be tempting to propose a referendum that addresses all your needs. However, the more complex the scope of your referendum, the more difficult it will be to explain.

Our data shows that people are willing to support what they understand. People understand a leaking roof; they do not understand increased reporting requirements contained within current legislation. People understand making a school entrance secure; they do not understand complicated curricular initiatives.

In general, people understand school in terms that were used when they went to school. That is why a new “football field” will almost always gain more support than a “new stadium”. In one community we recently surveyed, “building a gymnasium” drew 14% more support than building a “4-station gymnasium” – yet it was the same issue!

People also attempt to “fit” a school’s situation into their own personal situation. When money is tight at home, most people try to fix up what they have, rather than buy new. That is why “renovations” generally receive 10% more support than “building new” even when evidence that “building new” would be less expensive in the long run.

Conclusion: At the end of the day, keep it simple. People will vote to support what they understand.

Tip 2: Build trust with your community – everyday.

Voters will support your district, if they trust you. Trust needs to be demonstrated on a daily basis. Earning the public's trust cannot start as a line item on the agenda when the referendum planning committee meets for the first time. Unfortunately, we've found that in some communities, tax payers have amazingly long memories, recalling the incompetence of prior administrations. These stories "live on" for decades. How do you fight the ghosts of past administrations? If this is your situation, we have highlighted two cases which may be useful:

We worked with a district that was proposing a new elementary school. However, after completing their community survey, we learned that many respondents were perpetuating false rumors. The district responded immediately with a flyer titled "The Fact of the Matter". The communication organized "myths" and "facts" around several topics. Here is an excerpt:

MYTH: *Eagle Bluff Elementary was built with too much extravagance and unnecessary upgrades. The same thing could happen with the proposed new elementary school.*

FACT: *The proposed design is practical, durable, cost-effective, energy efficient, and student-friendly. The public is invited to study the plans and ask questions. Eagle Bluff Elementary was designed with input from the community. In the process of building the school, several contractors proposed material upgrades at no cost to the district so that they could showcase their workmanship. The project was completed well under budget with a cost-per-square-foot less than most elementary schools. The school was further enhanced through the work and donations of parents.*

In another case, we worked with a district where the previous administration had approved a 10% pay increase for three consecutive years for the entire instructional staff. The problem was that the district did not have the money. It created a \$1.9 million unfunded liability. Yikes! And you thought your district had problems?

In this case, previous decisions could not be defended. The new administration addressed the issue head-on. They launched a communication campaign called "Promises Made", which acknowledged that "mistakes had been made in the past". The campaign supported a proposed operational referendum and laid out a plan including:

- *Operating within a balanced budget*
- *Maintain reserves so that the district does not have to borrow money to pay the bills*
- *Have enough operating revenue to:*
 - *Handle expected growth in student enrollment*
 - *Implement the district's vision, to improve teaching and learning*
 - *Improve safety and security*
 - *Perform routine maintenance*

Conclusion: Go with the truth. It is the one deposit that will bring you a tenfold dividend.

Tip 3: View the referendum as a process, not an event.

Simply put, effective community and staff engagement takes planning and time.

Our experience shows that districts stumble when they rush through the process and skip critical steps. We are often asked, “How long does the referendum process take?” There is not a simple answer. It will vary for every district depending on your project scope, past history and many other factors. The following chart provides a framework for your team to think through the necessary steps in developing your timeline:

	Phase 1 Define Problem Many weeks or years	Phase 2 Define Criteria & Options 4 - 12 weeks	Phase 3 Community Engagement 4 - 8 weeks	Phase 4 Evaluate and use results 4 - 12 weeks	Phase 5 Communicate results 2- 4 weeks	Phase 6 Campaign 12 weeks
School Board	Define the problem and scope (limits)	Determine criteria for evaluation and possible options	Approve final survey	Receive advisory committee report	Press release of official report / Approve official wording / date of Referenda	Communicate accurate information and encourage people to vote yes
Administration	Communicate need to the School Board / identify influentials	Communicate options to school board	Works with School Perceptions to draft community survey	Prioritize criteria and referenda options - submit to board / mobilize influentials	Communicate results to staff	Communicate accurate information and encourage people to vote
Staff	Communicate needs and options to administration	Participate in advisory committee / make advisory recommendations			Familiarize & share results with parents	Communicate accurate information and encourage people to vote
Support Group	Communicate needs and options to administration	Participate in advisory committee / make advisory recommendations			Begin building support network	Communicate accurate information and encourage people to vote YES
Parents / Community	Communicate needs and options to administration	Participate in advisory committee / make advisory recommendations				Encourage people to vote YES
Financial / Construction Advisors	Evaluation of existing facilities (construction)	Determine financial implications of each option (financial)		Confer with Bond Council on referenda wording / legal requirements		
School Perceptions			Draft and administrate community survey	Write and present final report	Assist in developing the distinct message	

Conclusion: Don’t rush the process. Effective community engagement takes a lot of time!

Tip 4: Don't leave any of your staff out of the planning process.

Your most important communicators are your staff members and your instructional staff. We have found that support staff and custodial staff often have a great deal of credibility within a community.

Recently we completed two community surveys for two very similar districts. The two districts were almost identical in terms of enrollment, test score performance and average household income. However, District 1 had 63% support on an operational referendum while District 2 had only 37% support. What was the difference between the two districts?

Our data showed that District 1 had a staff satisfaction rate of 93% while District 2 had a staff satisfaction rate of 46%. Furthermore, we learned that District 2 rarely informed or involved any staff in district-level planning. Consequently, District 2 staff was unable to adequately communicate the needs of their district to friends, neighbors and parents. Due to the adversarial relationship between the district and the staff, many staff members undermined the referendum plans in part because they did not feel valued or included.

Involving your staff in the initial planning stage, and sending timely communications and updates, builds goodwill that can be far more powerful than any press release or newsletter article.

Conclusion: Your staff is communicating every day to parents, friends and neighbors. Make sure they are included and informed.

Tip 5: Don't do anything that undermines the credibility of the planning process.

Credibility can be damaged by any number of events during the planning process including: overstating the need, misappropriating school funds or appearing as if you are not considering other points of view. Credibility can also be damaged when school board members and/or district staff misappropriate their time or resources during the referendum planning process. Laws vary from state to state, so we encourage you to seek counsel to understand what you legally can and cannot do regarding planning and communications during a referendum planning process.

Examples that vary by state:

School Board Members can speak in support of or against the referendum. Members can participate in citizen committees or other activities to promote a referendum as long as they follow applicable campaign finance and election laws as well and other applicable laws such as the Open Meetings Law.

Administrators should not engage in promotional activities during normal working hours. Administrators can be a source of information while at work – consistent with their responsibility to provide information and educate the public regarding district issues.

Expenditures of district funds/use of district resources:

Districts have the responsibility to provide taxpayers with “neutral” facts and information about the referendum. Presenting needs, providing facts and figures, and sharing the rationale for the proposals are all appropriate messages the district should include in its comprehensive public information effort.

Information is considered “neutral” if it does not include words of “express advocacy” such as “vote for,” “vote against,” “support” or “oppose”.

There are also concerns regarding the use of district facilities for political organizations. Districts can make their facilities available, but may not discriminate between “yes” and “no” groups.

Conclusion: In most communities, there are always a few people looking to undermine your credibility. Understand the law; consult an attorney, and error on the side of caution.

Tip 6: Don't spend all of your time talking with the people who already support your district or those who are uninformed or opposed. Focus on the *Influentials*.

What is an Influential and who are they? New research shows a small number of people in a community have a great deal of influence over what others think and how they behave. It follows that these same people also have a great deal of influence over how others vote.

Ed Keller, author of the book *The Influentials*, notes, "One American in ten tells the other nine how to vote, where to eat, and what to buy." He refers to these people as the *Influentials* and identifies characteristics of this group in great detail. Some of the characteristics include:

- Active in church / community
- Earn more than \$50,000 / year but don't value "being wealthy"
- Active readers
- Computer and internet savvy
- Connected to multiple groups
- Believe they have interesting jobs
- Physically active
- Enthusiastic about technology

Once you realize the importance of this group, your strategy should be to understand and target the *Influentials* in your community. The emphasis should shift from, "Does this small group of influential people exist?" to "Who are they?" and "What are they saying?"

It is important to note that the *Influentials* in your community may not necessarily be the "squeaky wheels" or those that are vocal at your school board meetings. Although the *Influentials* are active in the communities, they are much more likely to talk to ten of their friends about an important issue than they are to speak out at a public meeting. They are also much more likely to take a community survey because they have developed an opinion and want to share their perspective.

Conclusion: A successful school district will be one that measures the perceptions of the *Influentials* in their community, and gains their support.

Tip 7: Use a community-wide survey to gather data AND educate your community.

Most community engagement projects typically involve a survey. However, too often districts approach a community survey as an academic research project. While gathering accurate and usable data is necessary, you may be missing a huge opportunity to educate your community members on the needs of your district.

A recent School Perceptions client referred to their community survey as an “interactive newsletter” because it contained both informational sections and survey sections. One way to guide your survey development is to ask your team the question: If we could get everyone in the community into a classroom for 10 minutes, what would we want to teach them? Then integrate that information into your survey. Here are two examples:

- 1) In the following excerpt, Maple School District wanted to educate respondents on their district’s background and their district’s current needs as well as initiate the survey.

Dear Maple community,

The Maple School District is celebrating our 50th anniversary. We proudly serve more than 2,500 students with five facilities, including three elementary schools, one middle school, and one high school. Enrollment growth has averaged more than 100 students over the past 5 years. For the last two years, the School Board and a Citizens’ Advisory Team have studied options to address our overcrowded, aging elementary schools. The challenge is to balance the needs of our students with those of our taxpayers, particularly in light of the current economy.

While we have heard from many people through a series of community forums held this winter, our goal is to develop a plan that reflects the priorities of our entire community. Therefore, we are urging all residents to participate in this district-wide survey.

- 2) In this example, the respondents are educated through a specific question:

<p>Building Utilization: Enrollment in the district has begun to increase. Both Oak Lawn and Franklin Elementary have no more available space, while Washington Elementary has empty classrooms.</p> <p>Should the district consider changing attendance boundaries to more evenly distribute enrollment at each of our schools?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p><input type="checkbox"/> Not Sure</p>
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Conclusion: When you conduct a community survey, don’t just ask questions, educate!

Tip 8: A community survey needs to be seen as objective, unbiased and inclusive.

A survey developed and administered by your district can be perceived as biased. Consequently the results are challenged and may ultimately be deemed unusable. This can break trust with your stakeholders (see tip 2) and undermine the process. The integrity of your project is important (see tip 5), therefore it is imperative that you consider using an independent firm to create, administrate and report the final results so that the entire process is viewed as credible.

At School Perceptions, we strongly believe in utilizing a process that builds ownership among community members. Therefore, we do not advocate random sampling, a process that, by definition, excludes *most* members of the community. People like to be asked their opinion and will many times support projects they had input in creating. Therefore, School Perceptions recommends a process that includes *every* member of the community. It can begin with mailing a survey invitation letter or a full paper version of the survey to every household in the district. The mailing includes a unique survey access code that assures that each survey can only be taken once.

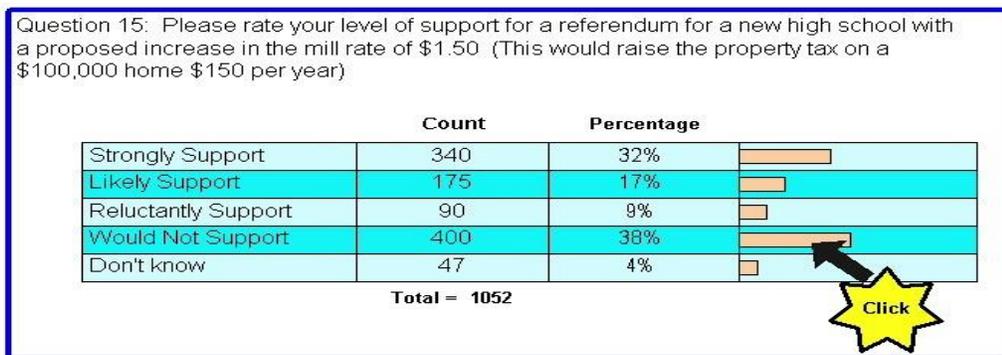
Over the years, we have found our survey methodology to be highly predictive in terms of the success or failure of a referendum. However, the lasting benefit of this “engagement process” is the ability to educate the community on the needs of your district and an awareness of the larger issues facing education and specifically your district.

Conclusion: Include your entire community in the planning process.

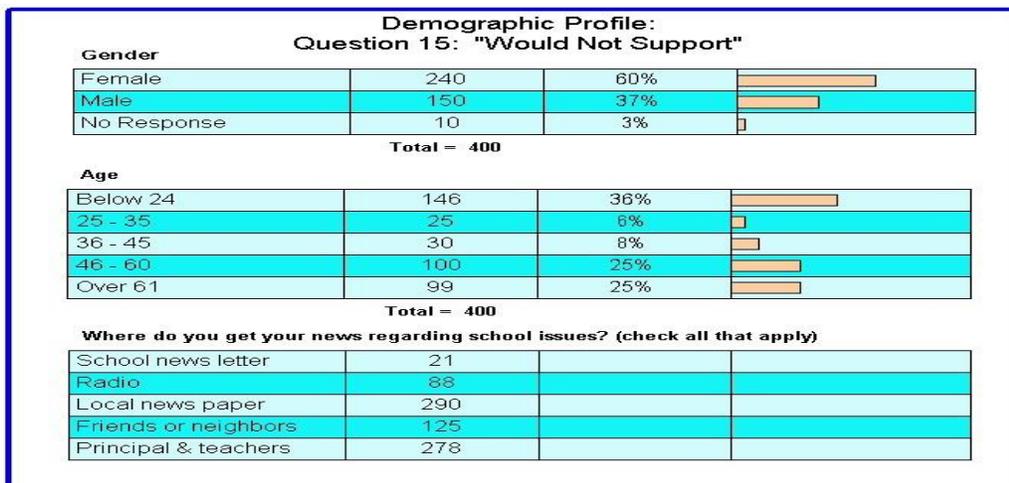
Tip 9: Make data-driven decisions.

Once your community survey has been implemented, you will want to dynamically analyze your results. Start by segmenting key subgroups to identify trends and patterns. The findings can be used to refine your strategy and adjust your communication plan. Ultimately, the only defensible decisions are those that are data-driven.

At School Perceptions, we've created powerful web-based software tools that will help you make sense of your data. An example, is our "Who said that?" tool that allows you to see the demographic profile of respondents who answered a certain question in a specific way. Knowing that a group of respondents doesn't support an initiative is important, but knowing who they are is critical.



By simply clicking on the response bar of any question contained in the survey, the software automatically generates a demographic profile of those individuals who gave a particular response.



Conclusion: Use data, not opinions to drive your planning.

Tip 10: Hire School Perceptions!

Conclusion: At School Perceptions we are sincerely committed to providing educational leaders with the tools and information to make a difference. We're here to help and support you. Please call anytime (262) 644-4300.