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Communicating with Key Stakeholders to Enable Strategic Change

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Publisher's Foreword

Creating and sustaining large-scale change in school systems requires effective strategic communication with both internal and external stakeholders. In this article Marilyn Saltzman, a seasoned school PR specialist offers her first-hand insights to the challenge of communicating with key stakeholders to support systemwide change in school districts.

Communicating with Key Stakeholders to Enable Strategic Change

This essay focuses on the communications processes that led to staff and community buy-in and on-going commitment to the change process and strategic planning efforts that created a more focused and successful school district.

The Need for Systemic Change

With rising local, state and federal pressure to increase student achievement and a lack of clear focus and re-

sources to meet these demands, Jefferson County Public Schools was faced with both a challenge and an opportunity when the superintendent retired in 1997. The district—the largest in Colorado—was suffering from lack of direction and insufficient resources. At the time, there was a divided school board, a string of failed operating fund elections, and changes in superintendents. Now was the time for systemic, systematic change.

In April 1997, the district hired a research firm to conduct a random sample telephone survey of Jefferson County voters. Results showed that 48 percent believed the district was on the wrong track, while only 37 percent said it was moving in the right direction.

As follow-up research and part of the superintendent search, the district conducted numerous focus groups to learn what qualities the community wanted in a new leader. The message was loud and clear—the district needed someone

who would “establish common vision, mission and goals” and “maintain focus on student achievement.” As they searched for a new superintendent, Board members purposefully looked for someone who would bring a new sense of direction to the district. They wanted to develop a mission and goals, and a comprehensive planning process that would lead to improved student achievement. They hired Dr. Jane Hammond because of her reputation as a strategic thinker and planner.

Developing a Strategic Plan

Superintendent Hammond's first charge when she took the reins of Jeffco Public Schools in July, 1997, was to develop a strategic plan. The culture in Jefferson County required a transparent, collaborative process. Both staff and community members expected meaningful involvement in any systemic change process. If the strategic plan was to be successful, proven communications strategies would have to be utilized to maximize em-

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ployee and citizen participation.

With a community of 500,000 citizens, 11,000 employees and 87,000 students, public engagement was a daunting task. While district leaders knew that shared decision making would take time, planning and effort, it would result in a strong foundation of support (Meadows & Saltzman, 2000). The district management believed that involving a community this large in the change process would take more time upfront, but it would save time in the implementation phase because more stakeholders would already have buy-in. The district followed the guidance of Peter Senge (1990), who said, “We both fear and seek change. People don’t resist change, they resist being changed” (p.155).

*The Communications Model*¹

The communications model that the district staff created to support Superintendent Hammond’s efforts to transform our school district can be outlined as follows:

¹ This model was developed by the superintendent and the staff in the Communications Services Department of the Jefferson County Schools, Colorado. The process outlined in the model was used to engage the district and its stakeholders using school public relations strategies in support of the district’s effort to create systemic and systematic change.

- Conduct comprehensive research with internal and external stakeholders to determine what the community values and expects from its public schools.
- Develop a comprehensive internal and external communications effort to ensure maximum community involvement in the strategic planning process.
- Convene a broad-based Strategic Planning Committee, composed of staff and citizens, to oversee the strategic planning process.
- Review results of research studies.
- Develop a draft mission, vision and goals based on the data.
- Conduct follow-up research with the internal and external audiences to solicit reactions to the draft mission, vision and goals.
- Revise mission, vision and goals based on input.
- Adopt mission, vision and goals and develop annual work plan.
- Develop an ongoing communication plan to inform staff and community about the adoption and implementation of the strategic plan.
- Evaluate communication efforts and knowledge of the strategic plan through follow-up surveys of staff and community.

The Role of the Communications Department

To engage the staff and community in developing and implementing the strategic plan, Hammond depended heavily on the Communications Services Department. She supported the theory that school public relations staff plays a key role in a two-way symmetrical communication model (Hunt & Grunig, 1994) to build relationships between the school district and its publics. During the strategic planning process, the Communications Services Department followed the credo that “Communicators act as eyes and ears of organizations, spanning organizational boundaries with one foot firmly planted inside their organizations and the other outside” (Dozier, Grunig & Grunig, 1995, p. 39).

The first step in the development of the district’s strategic plan was research, coordinated by the Planning and Communications Services departments, to gather community input on the mission and vision of the school district. Involving a department like Communications Services in the strategic planning process is supported in the literature. For example, Dozier et al state, “The communications department needs expertise regarding strategic research...the ability to systematically collect reliable information about large and small

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publics that affect the organization, organize that information into a manageable form, and share that information with the dominant coalition to improve strategic decisions” (p. 42).

With the assistance of Freeman Public Relations, an external consulting firm, the Communications Services Department and the district’s leadership initiated a comprehensive public relations campaign to ensure widespread community engagement in the strategic planning process. The target audiences were:

- Internal: 5,000 teachers; 400 administrators; 5,000 classified staff members; 88,000 students.
- External: The 500,000-member community at large; news media; parents; business leaders; legislators.

The key messages were:

- The district is beginning a new era with an increased focus on student learning.
- The district wants you to “Make Your Voice Heard” and encourages every citizen and student to participate in the strategic planning process.
- This is an unparalleled grassroots effort, perhaps the largest ever in the state.
- The community is invited to remain involved as the

plan is implemented and evaluated.

The public relations efforts began with an internal communications campaign in September, 1997. Communications Services developed a video and distributed it to principals, accompanied by a script, overheads and packets of handouts to introduce the planning process to staff. Principals were also encouraged to share the information with their parent committees.

Also in September, the Board of Education established the Strategic Planning Budgeting Council, made up of 35 citizens and the district’s administrative leadership. The citizens included business representatives, parents, Board of Education members and employee association representatives. The committee’s charge was to oversee the strategic planning process as well as implementation and evaluation of the plan.

In October, the district developed surveys for students, staff and parents that would guide the district in setting the mission and goals. The surveys asked questions about what the key stakeholders wanted and expected from their public schools, from core subjects to extracurricular activities.

The Communications Services Department also conducted surveys of key community groups, including Chambers of Commerce and the PTA, using electronic keypad technology. This process allowed data collection and instanta-

neous display of results at public meetings. While individual feedback is anonymous, participants can immediately view group results on a large screen. This technology was used throughout the strategic planning process.

A press conference to kickoff the community component of the campaign was held in early November. The media were invited to visit classrooms where students were completing their surveys as well as learn more about the other components of the “Make Your Voice Heard” public relations campaign. Other communications channels included paid radio announcements, an article in the district’s parent publication, information on the district’s web site, and news releases and fliers distributed throughout the community.

During November, the district conducted research through a variety of methods:

- Paper and pencil surveys were distributed to every student for completion at school.
- Written surveys for parents were sent home with every student along with a cover letter explaining the strategic planning process.
- Written surveys were sent to community leaders and were distributed at district and school meetings.
- Thirteen focus groups were held with approximately 100 students, par-

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ents, employees and business and community members participating.

- A web-based survey allowed staff and citizens to participate through the Internet.
- Short oral surveys were conducted at grocery stores, libraries and community meetings.
- The district held four town meetings, attended by approximately 400 citizens, where keypad technology was used to gather input.

These comprehensive efforts resulted in the participation of over 100,000 students, staff members, parents and community members. Throughout the survey administration period, the Communications Services Department continued its public relations efforts. Ongoing press releases, e-mail updates to principals, articles in the district's employee publications, and school newsletter articles kept key stakeholders informed and engaged in the process.

In early January, the Strategic Planning Council reviewed the feedback from the student, staff and community surveys to develop the preliminary framework for the strategic plan: mission, beliefs, customer requirements, goal, objectives, performance indicators and evaluation measures. The Communications Department widely publicized the council's work, using a variety of channels to ensure all key

publics were informed about the plan's progress.

In late January, the Communications Services Department helped organize and publicize staff and community meetings, held simultaneously at six locations around the school district, using state-of-the-art technology to provide feedback on the Council's initial proposal. The community meetings used real-time, interactive technology, with Superintendent Hammond on live video cast. She was able to explain the initial strategic plan components and provide opportunities for participants to make comments and/or ask questions. Keypad technology activities gave participants the opportunity to provide instant feedback on the proposed goals. The meetings garnered support for the goals from an audience of 610 community members and 1,570 staff members. Another 400 citizens provided written feedback to the Board of Education.

The meetings helped determine what phrases in the mission and goals were important to the community and what they wanted to omit. For example, the consensus was that it was important to include "all children" in the mission. However, the participants did not want to include the phrase "global education" in the mission and goals.

Based on the Strategic Planning Council's work and the feedback of the staff and community, the Board of Education in February, 1998, adopted the district mission:

To provide a quality education that prepares all students for a successful future. The Board also established two goals: 1) All students will reach high standards through quality instruction, curriculum, and assessments; and 2) All employees will be accountable for an efficient, high performing, customer-oriented organization focused on increased student achievement.

The Strategic Plan became not only the focus for the district's work, but also for the allocation of resources. After Board adoption of the plan, the district held meetings with principals and "accountability chairs" from all 140 schools to determine budget priorities based on the plan. Central administrators - curriculum specialists, financial experts, human resource professionals - used the goals designed by the community to establish measurable annual objectives. The Strategic Planning Committee developed an annual planning and review cycle, so the district's plan was a living, breathing document that could be evaluated and updated yearly.

After the adoption of the plan, public relations efforts took on a different focus. The communications goal now was to make the strategic plan an integral part of the district and community culture through ongoing one-way and two-way communications channels. The strategic plan became the focus of all employee and community communications.

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Communications tactics included:

- Regular updates in the weekly employee newsletter, *The Messenger*.
- Copies of the strategic plan sent to every staff member.
- Focus groups with principals to determine what tools they needed to enhance staff knowledge and support for the strategic plan.
- Regular press releases on progress of the strategic plan.
- Ongoing articles in the external newsletter, sent to 65,000 parents and community leaders, about the plan. In addition, each article in the newsletter was tied to a strategic plan goal or indicator.
- Updates in the district annual report.
- Establishment of an annual meeting to report progress to the staff and community.
- Posters in all schools and departments with the mission and goals.
- Establishment of a Speaker's Bureau to present the plan and its progress at community meetings, service clubs, etc.
- Production of staff and community videos about the plan.

- Regular updates on the district's web page.

An employee survey in fall 1998 provided baseline data on the staff's commitment to and knowledge of the strategic plan. The employees had an overall positive response to the statements, "I am committed to the strategic plan indicators" and "I feel accountable for the strategic plan." Slightly less positive, but still over 3.0 on a 5-point scale, were responses to the statements, "The goals and objectives of the strategic plan are clearly explained;" "Implementing the strategic plan is increasing student achievement;" and "The strategic plan gives us the focus we need to be successful in the future."

Based on the survey results, the district initiated additional communications measures to increase staff support and understanding of the plan. First, the Communications Services Department trained employees across all job roles, from custodians to bus drivers, from teachers to principals, to serve as study circle facilitators. The district then sponsored a series of study circles facilitated by peers (teacher-to-teacher, support staff-to-support staff).

The study circles explored issues of concern to employees and how the strategic plan has affected their work. The quantitative data gathered through the study circles enhanced what the district had learned through the written employee survey and provided direction for how to increase employee support of the strategic plan. For example, em-

ployees said they trusted and depended on their supervisor as a primary source of information. The leadership realized the power of the supervisor as a communicator and sense-maker in times of change, so district management sponsored a series of meetings with principals and supervisors to learn what they needed to communicate effectively about the strategic plan. As a result of supervisor input, the district established a number of public relations communications tools to ensure that all employees were informed:

- Cabinet-level managers visited with school staffs to discuss the strategic plan and their role in implementing it.
- Area administrators, who each supervised about 20 schools, developed common messages to share with their principals so that everyone was getting the same information no matter where they worked.
- Communications Services established a weekly online newsletter for management, *The Leadership Memo*. This concise, easy-to-read publication ensured that key district information was being shared with all managers, who could then share the information with their staffs.
- Communications Services developed Talking Points on key issues, which principals and supervisors could use to make oral

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and written presentations to their staff members.

When the district surveyed employees in 2000, results indicated a higher commitment to the strategic plan and a higher rate of agreement that the strategic plan gives the district the focus needed to be successful in the future. In addition, there was a higher level of agreement that the goals and objectives of the strategic plan are clearly explained. According to a “key driver” analysis of 2000 employee survey results, the strategic plan is one of the factors with the most influence on employee perceptions of Jeffco Schools as a world-class education system. A follow-up survey in 2002 found that employees had even stronger beliefs that the district was achieving its mission.

How did the community respond to the district’s new focus and direction? If the bottom-line measurement of school support is voter approval of tax levies, then Jeffco succeeded in turning around community perception! In fall 1999, the district passed, for the first time in 16 years, a mill levy override to increase operating funds. Finally, voters were willing to support additional funding.

Community support has been sustained although Hammond left the district in 2002. For example, in November 2004, with the advocacy of the business community and employee associations, voters in Jefferson County passed both a \$323.8 million bond issue (with 57.21 percent in favor)

and a \$38.5 million mill levy - operating fund - override (60.18 percent voting in favor). It was the first time in the district’s 54-year history that both a mill and bond passed in the same election.

Perhaps most important is that the strategic plan has served as a way to ensure the district is focused on student achievement. Although government accountability mandates for public education have increased since the strategic plan’s adoption, including federal *No Child Left Behind* Legislation, the plan is both comprehensive and flexible, and continues to guide the work of the district. Each year, the objectives and indicators for the plan are revised to reflect changing needs of the district. For example, the goals have been updated and now read:

- All students will graduate with meaningful choices for their future as a result of the quality instruction and rigorous curricula in Jeffco Schools.
- All employees will be efficient, welcoming, customer-oriented, and accountable for a high performing organization to ensure that all students graduate with meaningful choices.

While the strategic plan development process was time-consuming and labor-intensive, the results show that the efforts were worthwhile. Jeffco Schools is now a stronger school district, with increased support from staff

and community, and most importantly, improved student achievement as measured by the Colorado Student Assessment Program. In 2003-2004, for example, Jeffco students increased achievement on 17 of 23 state assessments.

Lessons Learned

What did the district learn about the change process and communications through the development and implementation of the strategic plan in Jeffco Public Schools? The process reaffirmed the district’s belief in the necessity of using a wide variety of both one- and two-way, ongoing communications channels to implement systemic change in a school community. Jeffco Schools learned the power of involving large numbers of stakeholders in developing a strategic direction and continuing to engage the public as change is implemented. The district realized the importance of not only providing ongoing communication with internal and external audiences, but also regularly measuring the effectiveness of the communication efforts. By conducting quantitative and qualitative analyses of staff and community knowledge and attitudes, the district was able to modify its communications efforts to ensure maximum participation in the ongoing planning and implementation process.

The experience of Jeffco Schools agrees with Hunt and Grunig (1994), who state, “Although an organization with good public relations may

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have to incorporate the goals of strategic publics into its mission, in the long run it will choose better goals and will be able to pursue these revised goals more effectively than it would if it ignored or fought the goals of the publics” (p.5).

Postscript

The strategic planning process that the district employed and the communications strategies that accompanied it have been proven successful through both longevity and results. The district has experienced success with both bond and operating levy elections, improved staff and community support, and increased student achievement. Now in its eighth year, the strategic plan continues to guide the work of the district, and the mission is widely known, understood and accepted.

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Francis M. Duffy

