Reform Support Network

State Facilitator's Guide for the Reform Support Network Communications and Engagement Assessment Rubric

A Guidebook for State Education Agency Teams to Use to Assess and Improve Their Communications and Engagement Efforts

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Contents

The Reform Support Network, sponsored by the U.S. Department of Education, supports the Race to the Top grantees as they implement reforms in education policy and practice, learn from each other, and build their capacity to sustain these reforms, while sharing these promising practices and lessons learned with other States attempting to implement similarly bold education reform initiatives.

Introduction

This facilitator's guide is meant to serve as a companion to the Reform Support Network's (RSN) ***Communication and Engagement Assessment Rubric***. When used together, these two tools are intended to help State education agency (SEA) leaders conduct a structured self-assessment with SEA staff and key stakeholders of current communications and engagement methods related to a particular initiative or topic, and to encourage discussion about new approaches and strategies that could be used to enhance the effectiveness of existing efforts.

> Using the rubric allowed our State to identify our strengths and weaknesses in our engagement efforts. Having identified those weaknesses, we were then able to be more intentional about both what we were communicating and how we were engaging our many important stakeholders.
>
> *— Matthew Deninger, Policy and Planning Manager, Massachusetts Department of Elementary and Secondary Education*

This self-assessment is most effective when conducted with a diverse team of leaders, including the communications leads for the agency, content experts, key outside partners and members of the agency's senior staff. This guide is designed to help SEA leaders productively manage that discussion, and ultimately develop a clear set of next steps, new messages and refined strategies. This process was successfully pilot tested in Colorado and Massachusetts and updated and refined based on participant feedback.

The RSN developed this guide to provide SEAs with a menu of exercises that they can use either separately or together to guide a review team through the process of examining elements of their current communications and engagement strategy. Exercises include establishing goals and objectives for measuring the success of communications and engagement efforts, identifying priority audiences, creating core messages, identifying multiple vehicles of communication, engaging stakeholders, and identifying and addressing capacity challenges.

The exercises can be used in one of two ways. A "run of show" is recommended as a comprehensive communications workshop, similar to what was pilot tested in Colorado and Massachusetts. This approach includes pre-work, a recommended participant list, materials and follow-up work necessary to ensure a productive review of the State's current communications strategies and capabilities. It assumes a half- or three-quarter day workshop with a team of SEA staff and external stakeholders, followed by a two-hour debriefing/planning session with the SEA's communications team either later that day or the following day. SEAs that have identified specific weaknesses in their overall communications and engagement strategy for a particular topic may want to follow this agenda to identify comprehensive solutions.

> The rubric served as a helpful guide for our time together as a team, and the expert facilitation ensured that we stayed on track, working through key issues and developing well-informed strategies for communicating about our new State assessments.
>
> *— Amy Skinner, Former Director of Communications, Colorado Department of Education*

Appendix A contains additional exercises that can be used to enhance the recommended workshop structure or that can be conducted on their own based on each State's individual needs and time available.

The exercises throughout this guide, including those in Appendix A, can be used individually or in a different order to organize small-group activities, separate focused discussions or brainstorming sessions to examine different facets of the agency's communications strategy. By using the exercises in the guide like a menu, States can design their own approaches based on their needs, time available and desired outcomes. Each suggested exercise includes basic information, including the amount of time and materials needed, and can easily be conducted individually to achieve smaller, incremental goals. States that choose to examine their communications strategies using any of these individual activities should begin by thoroughly reviewing the *Communications and Engagement Assessment Rubric* and conducting a self-assessment to prioritize areas needing attention.

Getting Started

These tools are designed to help States identify and focus on their individualized communications and engagement needs and challenges. To start, SEA communications directors should do the following:

- Review the entire rubric and conduct an initial self-assessment to identify the State's greatest areas of strength and where there is room to improve. This should take less than two hours.
- Once completed, identify a particular communication challenge on which to focus, such as the transition to new assessments or educator evaluation and supports.
- Form an internal team of content experts, communicators and the agency's chief of staff to participate in the workshop or series of workshops. Consider including external partners who can help validate State assessments and provide input on stakeholder engagement. One State that pilot tested the tool invited external partners and reported that their involvement was helpful to achieve the agency's meeting objectives.
- Identify either an internal or external facilitator to collaborate on planning, guide the group through the relevant part of the rubric and lead the workshop sessions
- Plan for either a series of short meetings or a full one-to-two-day workshop to conduct a self-assessment and complete exercises to address areas in need of improvement.

Overview of the Communications and Engagement Assessment Rubric

The rubric is best used in conjunction with the "4 I's" framework, a tool to help States and districts deliver a set of comprehensive communication strategies designed to ensure more effective communication with and engagement of stakeholders (see Figure 1). This framework should help States identify what they need to do to strengthen their communications and engagement efforts:

Figure 1. Communications and Engagement Framework for SEAs

- Conceptually this framework identifies **informing** as the foundation of all good practice: Keeping key audiences abreast of changes in expectations, policy and practice, and developing relevant messaging, content and strategic communications is the minimum expectation
- Efforts that lead to **inquiry** are more proactive, less reactive and more likely to have a positive impact. This can include opportunities for audiences to provide feedback and have their questions answered by SEAs and intentional efforts to demonstrate how and when feedback and input is used to inform and improve practice.
- In certain cases, SEAs also will benefit by creating opportunities for key audiences to get **involved** in the work as active co-creators of policies, practices, training and/or tools.
- The most powerful result—**inspiration**—will occur when State leaders motivate others to act and lead, based on what they have learned and on the policies and programs they have helped develop.

The tools in this facilitator's guide should be used with the RSN *Communications and Engagement Assessment Rubric* which the RSN developed to help SEAs reflect on and assess their current communications and engagement strategies, capacity and impact.

The rubric is divided into five sections, with each section representing a strategic focus area surrounding communications and engagement:

- **Overall Strategy:** How SEAs define communications and engagement, connect this work to their mission, make communications and engagement a priority, use a strategic plan to guide the work, support staff members as key communicators and measure success.
- **Audience Segmentation:** How SEAs identify priority audiences whose understanding and support is central to achieving their goals—and how effectively they communicate with them.

- **Audience-Specific Messages and Diverse Tactics:** How SEAs develop their core messages, select messengers for each audience, differentiate messages to meet the needs of different stakeholders, use diverse communications vehicles (including emerging social tools) and measure success.
- **Stakeholder Engagement and Coalition Building:** How SEAs involve important stakeholders in shaping policies and programs at the front end and/or inquire about these policies and programs later in the process, build relationships with a variety of partners, engage other reform champions, ensure all messages are delivered accurately and solicit and use feedback.
- **SEA Communications Capacity:** How SEAs allot staff to communications and engagement, train staff members, allocate funding to support their work and leverage partnerships.

The rubric utilizes a four-point scale in which 1 (Basic) is the lowest rating and 4 (Exemplary) is the highest rating The categories represent progressively more advanced and strategic approaches to effective communications. The categories are defined in the following way:

1. **Basic (1).** Either the practice doesn't exist or it is occurring at a very rudimentary level. The SEA's efforts serve to primarily *inform* stakeholders. Synonyms: lacking, inadequate, rudimentary.
2. **Emerging (2).** The SEA has taken important steps to improve its performance, building and growing its practices until they become routinized. There is evidence that good work is sometimes happening in at least one priority area of reform. The SEA's efforts better *inform* stakeholders and create some opportunities for *inquiry* and *involvement* Synonyms: progressing, developing
3. **Strong (3).** The SEA is regularly performing high-quality, purposeful communications work in multiple areas. The SEA's efforts *inform* stakeholders and create multiple opportunities for *inquiry* and *involvement*, leading to some evidence of *inspiration* and growing support. Synonyms: meets or exceeds expectations, comprehensive, proficient
4. **Exemplary (4).** The SEA's practices are highly strategic and consistently effective. The SEA's efforts successfully *inform* stakeholders and create ongoing, diverse opportunities for *inquiry* and *involvement*, leading to widespread evidence of support and, in some cases, *inspiration* among stakeholders. Synonyms: excellent, advanced, innovative.

The tools, exercises and resources contained in this guide help States work through the rubric and enable rich discussion about the depth, quality and impact of an SEA's current communications work. States can also use the exercises in the guide like a menu to design their own approaches based on their needs, time available and desired outcomes.

Comprehensive Communications Workshop

Workshop Objectives

All workshop participants will:

- Determine the characteristics of strong communications and engagement efforts and apply to ongoing efforts;
- Use the *Communication and Engagement Assessment Rubric* to identify areas that need strengthening in specific SEA communications and engagement efforts; and
- Identify next steps for strengthening communications and engagement efforts, including developing an action plan, brainstorming next steps and developing core messages to reach specific audiences.

General Agenda

This workshop is intended to take place over 6.5 hours, and all times are approximate. States can divide that time over one or two days. The main workshop on Day 1 will include the full group of participants and will last approximately 4.5 hours, including a 15-minute break. The follow-up planning workshop will take place on either the afternoon of Day 1 or on the morning of Day 2 It will include only the State lead(s) and will last approximately two hours. The agenda may be adjusted based on State context and scheduling needs, but the RSN recommends users who opt for the comprehensive workshop roughly follow the schedule below:

Day 1: Main Workshop (4.5 hours)

- Opening session (45 minutes)
- Introduction to the rubric and discussion of the communications/engagement challenge (75 minutes)
- Identifying key questions to address (15–25 minutes)
- Break (15 minutes)
- Tailored exercises: Selected and adapted to meet the needs of the State (80–90 minutes)
- Share-out with the chief and discussion of next steps (30 minutes)

Day 1 Afternoon or Day 2: Planning Workshop (2 hours)

- Reflect on the outputs of Day 1 (30 minutes)
- Identify clear next steps (60 minutes)
- Discuss how best to act on next steps (30 minutes)

Workshop facilitators should follow the suggestions provided in this document to customize the agenda according to the specific needs and context of their States. (An annotated agenda starts on Page 12 of this guide)

Workshop Focus

Before planning each workshop, facilitators should first work with either the State lead or the members of the State team to identify a particular communications challenge or priority reform area on which to focus, such as the rollout of new common assessments or the implementation of the new educator evaluation and support system. Once the issue or reform area is identified, participants should review the complete rubric with that challenge or reform area in mind, and identify one or two sections on which to focus based on their unique needs. Facilitators can help States identify the sections on which to focus based on the indicators that receive the lowest scores (1 or 2) on the rubric.

Facilitators should then design each workshop around that particular issue or reform area, urging participants to review the rubric with the particular challenges or concerns related to that issue or reform area in mind.

Facilitators should tailor each workshop to meet the needs of the State, depending on the issue selected Appendix A includes several options for modules that can be used in the second half of the workshop.

Recommended Participants

Whether States are planning a full workshop or shorter, more focused discussions, team members should include people empowered to make strategic decisions on behalf of the agency and external stakeholders who regularly work with the SEA on communications and engagement efforts.

Potential SEA participants *could* include the following stakeholders:

- State chief
- Public information officer
- Chief of staff or deputy
- SEA content leaders relevant to the rubric challenge area and the focus topic or issue
- Legislative liaison
- Communications staff
- Digital media staff
- Other key stakeholders could include:
    - Teachers, principals and district leaders, depending on the focus of the conversation
    - Representatives from business leaders associations
    - Representatives from the governor's office or secretary's office
    - State Board members or staff directors

Roles and Responsibilities

Facilitator: The facilitator will work within the SEA to organize the workshop or session(s) and may be either an external person brought in to run the session or an internal member of the staff. The facilitator's role will include working with the State lead to organize the meeting, sending pre-reads out to participants in advance, including the relevant section or sections of the rubric; facilitating the workshop or session(s); typing notes and distributing them to the team; and completing the necessary follow-up work and debriefs. During the workshop, the facilitator should remain neutral in order to manage the conversation, ensure participants stay on track during exercises and press participants to reach consensus when they disagree. If the SEA uses an internal staff member as the facilitator, he or she should be skilled in neutral facilitation. The facilitator should regularly ask participants the question, "How do you know?" Facilitators can work in teams of two, with one designated as the lead facilitator. Facilitator teams should work together to decide how to best divide the responsibility between themselves.

State Lead(s): The State lead will work closely with the facilitator to organize the workshop or session. This person will be responsible for securing a location, ensuring participants are invited and respond to invitations, ensuring the involvement of the chief, deciding on the appropriate communications/engagement challenge and focus topic or issue for the workshop, sending pre-work to participants, participating in follow-up work and ensuring any other logistical issues are handled. The State lead will also be responsible for participating in the Day 2 planning workshop and making sure participants carry out actions they identify for follow-up. If an external facilitator is not an option, the State lead can play the facilitator role.

State Chief: Ideally, the State chief will kick off the meeting on Day 1 by providing opening remarks about the importance of strong communications and engagement, as well as his or her hopes for this workshop. During this time, the chief should remind the group that he or she has brought the participants together to make strategic decisions for the agency, and that the group should aim to end the day with clear ideas about what it would take to move the agency's communications and engagement work forward. The chief should also participate in the last 30 minutes of Day 1 to hear about the work the group has accomplished throughout the day. Beyond these two sessions during Day 1, the chief does not need to participate in the rest of the workshop, though he or she is welcome to do so if time and schedule permit. If the chief is available to participate in only one session, he or she should give preference to the Day 1 closing session. If for some reason the chief is not available to participate at all, another senior agency leader can serve in this role on his or her behalf, but the facilitator should try to accommodate the chief's schedule when the workshop date(s) are selected.

Materials

Facilitators should use this guide in conjunction with other materials:

- The RSN *Communications and Engagement Assessment Rubric*
- The RSN *Communications and Engagement Framework* (4 I's – available in Appendix B)

Give participants a folder or binder with the following necessary materials and tools:

- The section of the RSN *Communications and Engagement Rubric* that has been selected in advance as the focus of the workshop
- The RSN *Communications and Engagement Framework* (4 I's – available in Appendix B)
- Dot stickers

Pre-Work

The State lead and facilitator should begin planning four to six weeks before the workshop. Workshop participants will also need to complete pre-work to ensure they are prepared to fully participate. This section outlines the pre-work for facilitators and State leads.

Four to Six Weeks Before the Workshop

First pre-meeting:

- Participants: Facilitators and State lead(s)
- Objectives:
  - Introduce the workshop to the State lead(s).
  - Introduce the idea of focusing on one topic or issue related to the relevant reform area.
  - Introduce the rubric, including the five sections, and the idea of focusing on one section.
  - Discuss potential participants.
  - Discuss the role of the chief, the role of the State lead(s) and associated time commitments.
  - Review the rubric in full and request that the State lead complete the entire rubric before the second call to identify the State's problem areas and to help the facilitator better understand the current capacity level and context
  - Agree upon next steps, including scheduling the workshop, identifying participants, selecting a focus topic or issue and identifying a challenge area from the rubric.

Two to Three Weeks Before the Workshop

Second pre-meeting:

- Participants: Facilitators and State lead(s)
- Objectives:
  - Review the results of the completed rubric and discuss any unusual outcomes or highlights.
  - Discuss and agree upon a focus topic or issue.
  - Discuss and agree upon a communications and engagement challenge area in the rubric (that is, the area where the State could most use help communicating with and engaging stakeholders about the given topic or issue).
  - Review the participant list and confirm the chief's participation.
  - Review the agenda and discuss specific modules to use in the second half of the workshop.
  - Review required logistics and materials.

Optional Chief Meeting: Either the State lead(s) or the facilitator should communicate with the chief ahead of time to discuss his or her role in the workshop and share talking points for the opening session. The State lead(s) and facilitators should decide the best way to handle this preparation, whether it is through a call between the chief and the facilitators or through a meeting between the chief and the State lead(s).

One Week Before the Workshop

Send pre-work to participants: The State lead(s) or facilitators should email the rubric, highlighting the section identified as being most relevant to the challenge area, to participants at least one week before the workshop They should request that participants review at least the identified section of the rubric in advance, make observations on the State's progress in this area and come prepared to share their responses on the day of the workshop.

Prepare materials for the workshop:

- Ensure all materials are available and packed.
- Ensure slides and the agenda have been updated to meet the needs of the team as discussed during the pre-calls.

Day of the Workshop

Arrive 30–60 minutes early to set up. This will include:

- Creating templates, 4 I's and rubric-description posters on flipchart paper;
- Placing markers, binders, cards and any other materials on tables; and
- Hanging templates and 4 I's poster on the walls.

Annotated Agenda

This section outlines each of the key sessions in the recommended full workshop agenda in greater detail. Each exercise includes learning objectives, detailed activities, suggested timing, discussion questions, templates and facilitator tips. States that opt for the full workshop could consider following some version of this agenda; States that opt for individual sessions should select from the exercises outlined below as needed to meet their specific needs and time constraints.

Day 1

Opening Session (45 Minutes)

Objectives

- Participants will understand the characteristics of strong communications and engagement efforts; and
- Participants will understand the 4 I's framework as a potential tool to help improve SEA communications and engagement efforts.

Facilitator Detailed Agenda

Time	Activities
30 minutes	SEA Opening Remarks: (15 minutes) • State chief or other top leader makes welcoming remarks to set the stage Facilitator Opening Remarks: (15 minutes) • Ask each participant to introduce his or herself • Ask participants to share their names, titles and goals/expectations for the workshop • Optional: One facilitator could capture these expectations on a flipchart to refer back to throughout the day, especially at the end of the workshop (Use the Meeting Expectations template at the end of this exercise as a formatting guide) Introduce the workshop • Review the agenda and objectives for the day • Explain that this workshop is intended to be an opportunity for all participants to self-reflect, share their opinions and work together to create a plan for improving communications and engagement efforts It will be very interactive, and you hope that everyone will remain engaged so everyone can get the most out of their time together. • Introduce the 4 I's • The 4 I's are a framework for States to use to think about the purpose behind their communications and engagement efforts • Conceptually, this framework identifies informing as the foundation of all good practice: Keeping key audiences abreast of changes in expectations, policy and practice, and developing relevant messaging, content and strategic communications is the minimum expectation • All efforts will be more proactive, less reactive and more likely to have a positive impact when inquiry is prioritized by creating opportunities for audiences to provide feedback and have their questions answered, and by demonstrating that their feedback and input is used to inform practice • In certain cases, SEAs also will benefit by creating opportunities for key audiences to get involved as active co-creators of policies, practices, trainings and/or tools • Ultimately, the most powerful result—inspiration—will occur when State leaders motivate others to act and lead based on what they have learned and on the policies and programs they have helped develop • The default for most States is to focus on informing, but the rubric we will use today includes strategies that will help you to use the other three I's (Inquire, Involve, Inspire) as well Optional: Set norms or ground rules for the workshop • These may include rules prohibiting cell phones, asking everyone to participate, etcetera • If the State lead(s) feels it's appropriate, ask the participants to establish their own norms; record them on flipchart paper and post and keep them on the wall throughout the workshop (Use the Meeting Norms template at the end of this exercise as a formatting guide)

Time	Activities
15 minutes	Strong/Weak Brainstorm: (10 minutes) • Ask participants to think about a time they were involved in a strong communications efforts in the agency and a time they were involved in weak efforts in the agency Tell them to write about both efforts on the provided paper and then turn their answers over so no one else can see • Explain that the purpose of this exercise is to get participants thinking and to level-set their understanding of what makes a strong versus a weak approach to communications This is by definition an ice breaker or warm up exercise, but creates a foundation for the rubric exercise. Once they've written about both efforts ask them to describe the strong effort generally, without noting specific details—In general, why did it work so well? Who was involved? How was it organized? What were the results? Record participant input in two columns on flipchart paper, using the Strong/Weak Brainstorm template at the end of this exercise as a formatting guide. • Next, ask participants to describe the weak effort generally, without giving specifics—Why didn't it work out? Record their input on the Strong/Weak Brainstorm flipchart paper Debrief: (5 minutes) • Once you have completed general lists of characteristics of strong and weak efforts, summarize what participants have identified • Discuss the differences between the two lists and highlight what sets the strong efforts apart from the weaker ones • Point out particular connections to the rubric where possible • Point out connections to the 4 I's—areas where involvement or engagement played into the strong effort but were missing from the weak one, for example • Remind participants that while they will focus on one part of the rubric today, much of what they have identified as part of a strong effort is covered in the rest of the rubric, and they should consider how to explore the rest of the rubric at a later date

Facilitator Notes

- Set expectations and norms only as appropriate for your particular participants, the context of the State and the amount of time participants normally spend working together.
- For the Strong/Weak Brainstorm, participants should think about ALL work, not just the work covered by a particular rubric challenge area. Indicate that this is an exercise to get them thinking as a group on what makes communications efforts particularly strong or weak.
- Remind participants ahead of time that during a brainstorm, the point is just to get their ideas out. You'll come back to discuss these ideas once they're all raised. During the brainstorm, consider setting a time limit to keep the ideas coming quickly.

Materials/Logistics

- Copies of 4 I's framework (in participant binders) and 4 I's wall poster
- Exercise slide with discussion questions
- Slide with agenda/objectives
- Flipchart paper with templates
- Markers

Meeting Expectations Template (FLIPCHART)

See the full **Meeting Expectations Template** in Appendix C.

Expectations and Goals for Today

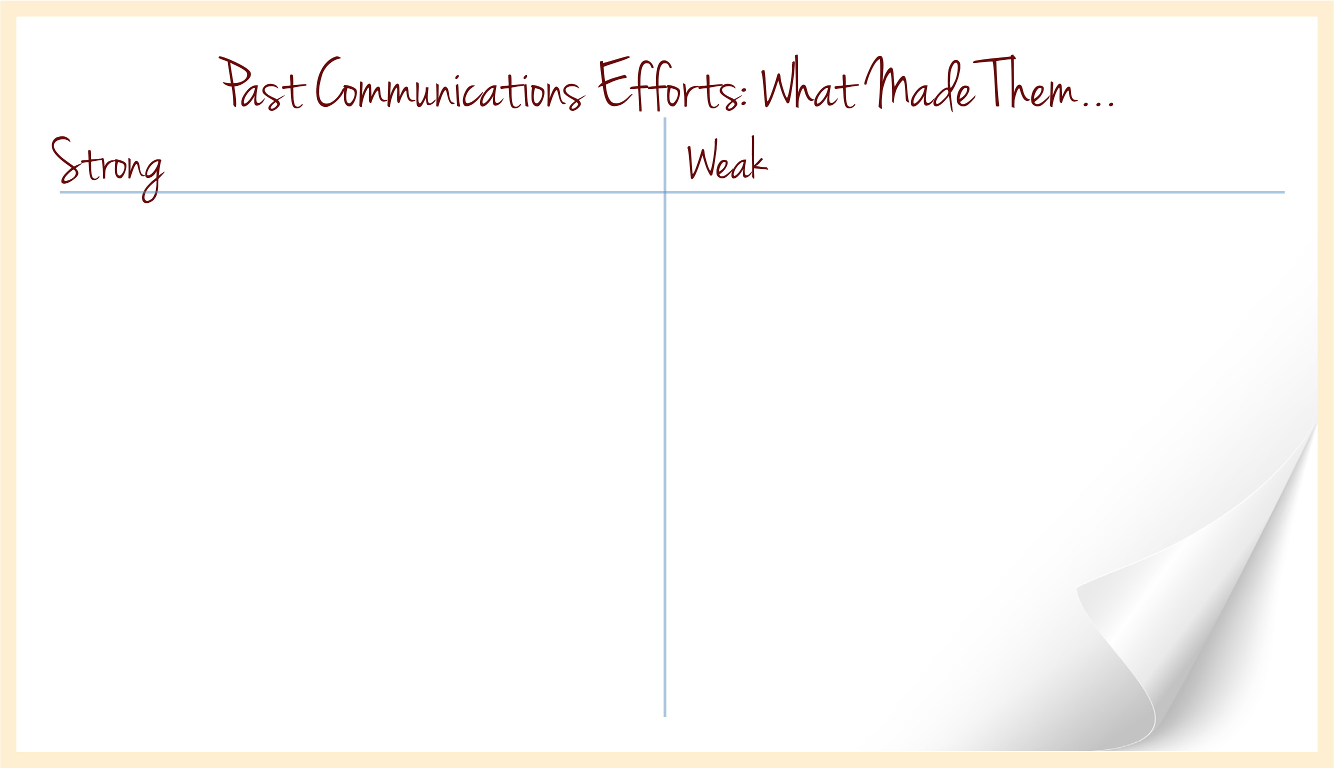
Meeting Norms Template (FLIPCHART)

See the full **Meeting Norms Template** in Appendix C.

Meeting Norms

Strong/Weak Brainstorm Template (FLIPCHART)

See the full **Strong/Weak Brainstorm Template** in Appendix C.



Rubric Introduction and Review (75 Minutes)

Objectives

- Participants will use the rubric to identify the strengths and weaknesses in their current communications and engagement efforts; and
- Participants will use the rubric to identify new strategies that could strengthen their current efforts.

Facilitator Detailed Agenda

Time	Activities
15 minutes	Introduce the rubric: • Remind participants that the purpose of today's workshop is to reflect upon their current work and identify potential methods for strengthening their communications and engagement efforts Review the purpose of the rubric and its general structure, including the five sections: • Overall strategy • Audience segmentation • Audience-specific messages and diverse tactics • Stakeholder engagement and coalition building • SEA communications capacity Specifically point out the topic that participants identified as a focus for the day and discuss how and why they chose it Explain that the rubric is intentionally content-neutral and that it can be used to help assess the strengths and weaknesses of any initiative The workshop is intended to focus on one specific effort, but participants should take the tools and approaches modeled at the workshop and use them to think through other initiatives
60 minutes	Share observations on one area of the rubric: (5 minutes) • Remind participants that they hopefully have already taken the time to review this area of the rubric in advance as part of their pre-work one week before the workshop, and they should have made observations on the State's progress in the communications and engagement challenge area • Provide participants with dot stickers With the selected issue in mind, ask them to review the first row of the rubric and place a dot in the column they think best describes the work of the agency Use the Rubric voting template at the end of this exercise as a formatting guide Discuss observations and rationale: (45 minutes) • As a group, review the first row of votes and discuss the various observations • If votes are distributed across multiple ratings, ask someone who voted on either extreme to share why, and then ask someone from the other extreme to share why • Continue to ask participants to share the rationales behind their votes, making connections and recording their notes on the flipchart throughout • If time is limited, don't feel that you need to push participants to come to consensus; the point is to have a good conversation and record notes about the reasoning behind their votes • After completing the first-row discussion, ask participants to vote on the remaining rows, and then discuss each **Note that this section will take more or less time depending upon the section of the rubric that you chose to focus on and the number of rows in that section Discuss the overall picture: (10 minutes) • How do we perform as a whole on the section of the rubric identified earlier by the team? • Within this section, where are our strengths? Where are our challenges? • Specifically ask participants to identify areas where they rank a 1 or 2 so you can focus on how to move them to a 3 or 4

Facilitator Notes

- As participants are voting, urge them to indicate the votes they actually came with and to not be swayed when they see the votes of other people.
- Keep in mind that when you are pushing participants to come to a consensus on their observations they don't have to be in total agreement; rather, they just have to all be able to live with the decision.
- It will be easy for this conversation to go long, so keep it moving and urge the group to come to a consensus as quickly as possible. Consider tabling a rubric discussion and coming back to it if you're finding consensus hard to achieve.
- If votes cluster around the same rating, you should still ask participants to identify their rationale and record notes on the flipchart, but feel free to quickly move on if consensus is easily reached. If you feel the consensus is inauthentic, though, feel free to play the devil's advocate or call them back to the rubric and question whether certain elements are in place. Asking "How do you know?" may help further drive the discussion.
- Some tips for facilitating conversation:
    - Ask people who voted certain ways to share why (start with the highest and lowest votes or with the majority vote).
    - Ask any outliers to share why they voted the way they did
    - Ask whether outliers are convinced by others' rationales and whether they are willing to accept the group answer If not, ask them to identify why.
    - Keep in mind that the group won't necessarily come to an agreement on the rating with the most votes at the start It may come to a completely different consensus through the conversation.
    - Sometimes you may want to synthesize what you're hearing, make a suggestion for moving forward and see if the group can live with it.

Materials/Logistics

- Two sheets of flipchart paper, formatted using the Rubric Voting template
- Markers
- Dot stickers (in participant folders)
- Copies of the full rubric with the challenge area highlighted
- Slides introducing the rubric

Rubric Voting Template (FLIPCHART)

*Copy this template on two sheets of flipchart paper hung next to one another.

See the full **Rubric Introduction Template and Review** in Appendix C.

Topic	Rating				Rationale
	1	2	3	4	

Identifying Key Questions to Address (15-25 Minutes)

In this session, the State team will identify the most common questions it hears about the focus issue, topic or initiative. These questions will be used in the following session to create the core messages about the issue on which they have chosen to focus.

Objective

- Participants will identify common questions about the topic or issue of focus.

Facilitator Detailed Agenda

Time	Activities
15 minutes	Brainstorm: What are the most common questions you have heard from key audiences about the issue, topic or initiative that we are focusing on today? (10 minutes) • Record these questions on flipchart paper as participants brainstorm Provide participants with dot stickers and ask them to vote on the top questions that need to be answered by key audiences Indicate that these should all be answered succinctly, and if the team desires, can inform a Frequently Asked Questions (FAQ) document (5 minutes)
5–10 minutes (optional)	Select two questions to focus on for the rest of the day These will likely be the top two questions, but not necessarily Give the group a chance to discuss and prioritize Set up the next exercise: (5 minutes) • Tell participants that after the break they will split up into two groups that will each focus on one question The groups will develop core messages in response to the questions that the Department can use in written materials and for talking points • Count off to identify the two groups Ask participants to break for 15 minutes and then come back to the breakout groups

Facilitator Notes

- You may change the brainstorm slightly and ask participants to identify the biggest challenges they anticipate related to the focus issue or initiative, rather than asking them to describe questions they have heard.
- Decide how many dot stickers to provide for voting by using the N/3 method. That is, divide the number of questions identified in the brainstorm by three, then allow participants that many votes. For example, if the brainstorm yields 15 questions, you will provide participants with five votes (15/3 = 5).

**Note that this is a good place for the 15-minute break if it seems appropriate given the day's schedule

Materials/Logistics

- Flipchart paper
- Markers
- Dot stickers

Key Questions Template (FLIPCHART)

See the full **Identifying Key Questions Template** in Appendix C.

Session Outcomes

- List of key questions to be used in an FAQ document
- Key questions to use as starting point for message development exercise

Creating Audience-Specific Mesages (60 Minutes)

Audience-specific messages should be grounded in research (including available market research, best practices from other States and input from members of key audiences as well as the agency's senior leadership) and tailored to what specific audiences want to know and need to know. These messages should be consistent, up-to-date, relevant and effective. Different messages should be developed for different audiences based on their interests and needs, and various tactics should be used to reach each audience directly. Social media, for example, is an effective tool to reach parents and educators (some States have found that Pinterest is specifically effective to reach educators), whereas face-to-face meetings are an appropriate and effective way to reach principals, local educational agencies and other partners. For more tips on message development, see Creating Core Messages exercise in Appedix A.

Objectives

- Participants will consider what information their primary audiences need
- Participants will contribute to the initial development of messages created specifically to meet the needs of unique audiences.

Facilitator Detailed Agenda

Time	Activities
10 minutes	If the State team includes six or more people, break up into two groups Give each group one of the two questions identified in the previous exercise; ask them to quickly craft two or three core messages for that topic or issue and record them on a sticky note or card A core message should include the facts any audience needs to know and what they should think about the issue being communicated Be careful not to spend too much time word-smithing your message—for now, just write down the general idea Post all the messages on a shared piece of flipchart paper
20 minutes	Reconvene the team Start with the first question and draft message Identify the audiences that will benefit most from direct communication or engagement on this topic, or who will likely seek an answer to the identified question Record all answers using the flipchart For each audience, identify why you want to reach that audience and what information it will likely need on this topic Revise the draft core messages developed earlier to tailor them to meet the needs of the individual audiences, using language they will understand using language they will understand and respond to
25 minutes	For each message, discuss the following: • What vehicles will you use to communicate your core message to this audience? • Who will create and distribute the communications? Who will be on the team? • What is the timeline for the communications? • What immediate next steps should we take? Be creative when thinking about vehicles you can use to communicate Are there new vehicles that you could try? See the list of example vehicles on page 37

Creating Audience-Specific Messages Template

Use this template as necessary for each of the primary audiences you identified.

See the full **Creating Audience-Specific Message Template** in Appendix C.

Audience				
Purpose				
Core Messages	Vehicles for Communication	Owner/Team	Timeline	Immediate Next Step

Note: To further refine these messages, see **Creating Core Messages** exercise on page 34.

Share-Out and Closing Discussion (30 Minutes)

Objective

- Participants will use the tools to identify next steps for strengthening SEA communications and engagement efforts.

Facilitator Detailed Agenda

Time	Activities
30 minutes *Chief to participate	Share-out with the chief and discuss next steps: • Review the progress that was made over the course of the day, including the topic selected, the outcome of the rubric discussion, the questions identified and the draft core messages and strategies for reaching specific audiences • Ask the chief to share any final thoughts or reflections on what he or she has heard • Thank the chief for his or her comments • Let participants know that they have done really good work that day, and that you want to ensure they carry this work forward Remind them that the tools are content-neutral and that you haven't used all of them, so they should discuss how they can use the rest of the tools to continue to build stronger strategic communications • Remind participants that the State lead(s) will take the results of that day's workshop and translate them into specific action plans the following day • Ask discussion questions, and record notes on flipchart paper: · How should we keep this work moving forward? · Is there anything we as a State must be sure to include in our action plan? · Refer back to the goals and expectations we set at the beginning and reflect: Did we achieve these? Thank the group for their time and participation

Facilitator Notes

- The participants should be able to take the lead in sharing the results of their work with the chief, but you may need to push them to stay on time and keep the conversation moving.
- You may want to ask the chief questions before opening it up to others.
- Keep in mind that deeper challenges may surface during this conversation with the chief, and some things may not necessarily get resolved in this session. In that case, you may want to suggest setting up another meeting to further discuss unresolved issues.

Materials/Logistics

- Outputs from the previous exercise
- Markers
- Flipchart paper

Day 1 Afternoon or Day 2

Action Planning (120 Minutes)

Objectives

- Participants will reflect on the outputs of Day 1.
- Participants will identify next steps for strengthening SEA communications and engagement efforts.
- Participants will commit to action items and ownership of the work.

Facilitator Detailed Agenda

Time	Activities
30 minutes	Discuss and debrief the previous day Identify what went well (pluses) and what you would change (deltas) Review the summarized notes from Day 1 Discuss: • What makes sense about the strategies that have been developed so far? • What is most important to act upon? • What ideas should we not include in our action plan, if any?
60 minutes	Discuss and record notes using the Action Planning template on flipchart paper: • What needs to happen to keep this work moving forward? • Who should own each action item? • What should the timeline for each be? • How can we continue to use the rubric and other tools in our work? (This becomes a next step, which should also have an owner and a timeline)
30 minutes	Based on the next steps identified, discuss what it will take to make them happen: • Who should we talk to in order to make these next steps happen? • What do we want those individuals to do? • How will we get them to do what we want? • By when should next steps happen? Answer any final questions the State lead(s) may have Schedule a follow-up call or meeting for at least two weeks later

Facilitator Notes

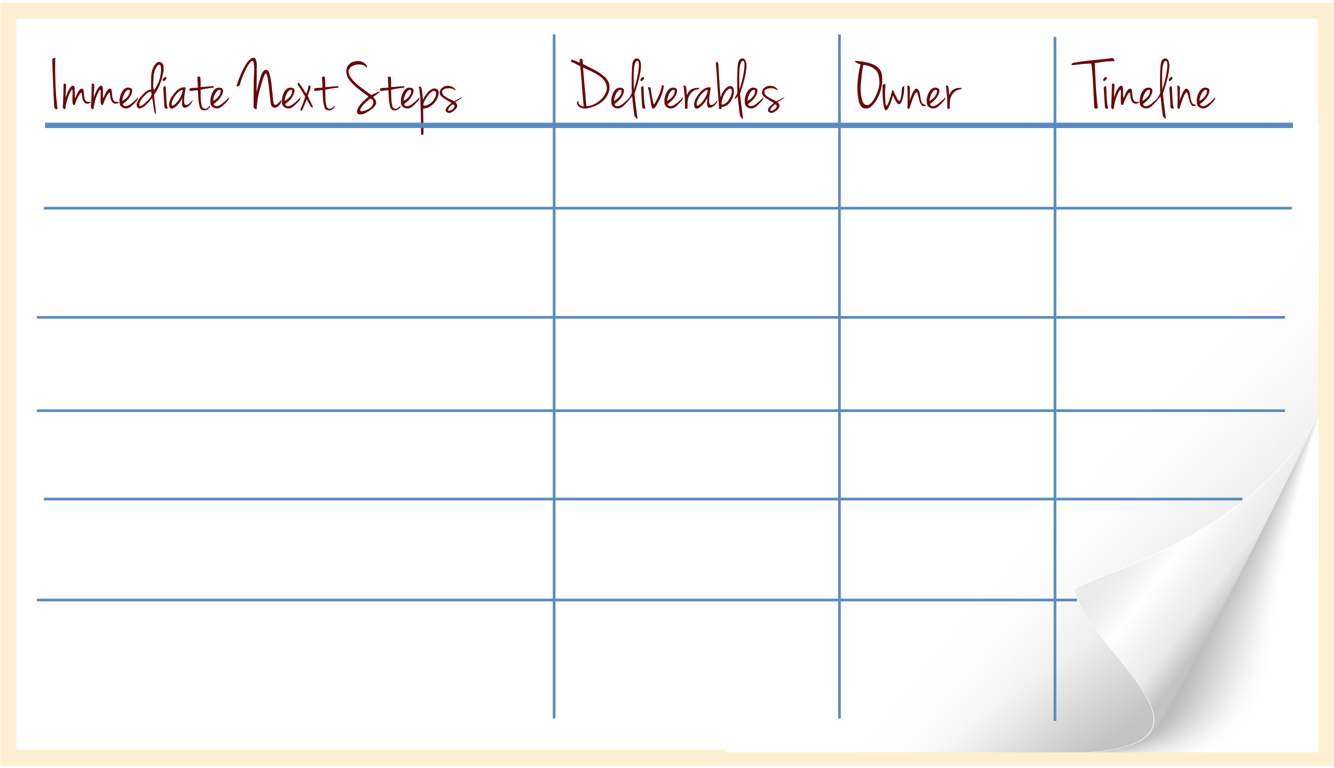
- While the smaller audience for this conversation will make it somewhat more informal than the previous day, you should still record notes and encourage participants to create clear next steps.
- Some participants and other stakeholders may be reluctant to commit to next steps outside of their control, so encourage them to think through what it would take to make those next steps happen, who they would need to engage, etcetera.

Materials/Logistics

- Outputs from previous exercises, typed up overnight
- Markers
- Flipchart paper with template

Action Planning Template (FLIPCHART)

See the full **Action Planning Template** in Appendix C.



Facilitator Notes

- Recommend that teams develop only as many next steps as they are prepared to complete, and that they make them specific and actionable.

Follow-Up

Facilitators should complete some of the follow-up steps detailed below before leaving the workshop; other steps should be completed within one or two weeks following the workshop.

Before Leaving

- Take pictures of all flipcharts.
- Leave hard copies of flipcharts with the State lead(s) or throw them away
- Schedule a follow-up call with the State lead(s) for approximately two weeks later.

Within the Week

- Use the pictures to type up the notes from the workshop.
- Email notes to all members of the team.

Two Weeks Later

- Hold a follow-up call with the State lead(s) to discuss any progress on next steps.

Appendix A: Optional Workbook Exercises

States that need to address a particular area of the rubric should consider completing the following exercises. These can be completed along with some of the exercises in the recommended workshop agenda, or as standalone exercises.

Exercises, which are intentionally aligned with the rubric categories, include:

1. Establishing Goals and Objectives for Communications and Engagement Efforts

Rubric Category: Overall Strategy

Clearly defined, actionable goals and objectives serve as the foundation for successful communications and engagement efforts because they help to provide clarity about what the agency is trying to accomplish through these efforts, including identifying the audiences you are trying to reach and toward what end.

Expected time: 45 minutes

Objective

- Participants will discuss and identify goals and objectives for communications and engagement efforts.

Directions

- Discuss the following questions and record notes using the Goals and Objectives template:
  - What is the purpose of our communications and engagement efforts?
  - What are we trying to accomplish?
  - Generally, how do we aim to accomplish these goals? What are our current methods?
  - What do we want people to know and/or be able to do as a result of our communications and engagement efforts?
- Once you have identified these core purposes and methods, reflect (as a group or individually) and record notes using the Goals and Objectives template and the 4 I's framework:
  - Do we agree on the purpose of our communications efforts? If not, how can we address this?
  - Would others in the agency agree on the purpose of our communications and engagement efforts? If not, how can we address this?
  - Are the agency's communications and engagement objectives frequently revised to reflect our current conditions? If not, how can we address this?
  - Are the methods we currently use appropriate for achieving our stated goals?

Goals and Objectives Template

Purpose/ objectives of our communications and engagement efforts	
Methods for achieving our communications and engagement goals	
Do we agree on the purpose? If not, how can we address this?	
Would others in the agency agree on the purpose? If not, how can we address this?	
Do we regularly revisit our communications and engagement objectives? If not, how can we address this?	

2. Measuring the Success of Communications and Engagement Efforts

Rubric Category: Overall Strategy

Measuring the success and reach of communications and engagement efforts is important to understand whether the agency's efforts have the intended impact and to identify what needs to be changed, strengthened or removed from your strategy. In addition to establishing a regular and systematic process and mechanisms for measuring success, agencies should have a clear process for analyzing the data and using them to improve elements of their strategy.

Expected time: 60 minutes

Objectives

- Participants will understand how they currently measure the success of their communications and engagement efforts.
- Participants will identify new and refined ways to measure the success of their communications and engagement efforts.
- Participants will identify how best to use the information they get by measuring the success of their communications and engagement efforts.

Directions

- Identify a current topic or issue that is important to the agency.
- Identify the key stakeholders who need to be engaged or communicated with in the context of that particular topic or issue. Record these stakeholders using the Measuring Success template.
- Identify the methods used to communicate with the first stakeholder group Record them using the Measuring Success template.
- For each method, ask the following question: How do we know this method is working? Identify existing or potential ways of collecting feedback and evidence of the success of communications efforts, drawing on the rubric for potential strategies. Record feedback methods using the Measuring Success template.
- For each method, identify how often feedback should be collected and who will be responsible for collecting it. Record these using the Measuring Success template.
- Repeat this process for additional stakeholder groups, as time allows.
- Once you have completed the exercise for each stakeholder group, ask:
    - Are the methods we identified for collecting feedback enough to provide us with a regular, clear picture of how well our communications efforts are working?
    - What else could we/should we be doing?
    - Is the collection effort manageable for those responsible?
    - What do we need to do next to make this happen?
    - How should the State use the feedback and/or evidence?

Measuring Success Template

Stakeholder Group	Communication Methods	How do we Know it is Working?	How Often Will we Monitor?	Who is Responsible?

3. Identifying Priority Audiences and Effectively Communicating to Them

Rubric Category: Audience Segmentation

Differentiating messages to key stakeholders ensures that they receive the most relevant information about key initiatives or programs and can understand and apply the information in a meaningful way. This requires the agency to consider which audiences are impacted by each initiative, determine which information is relevant to each audience and establish how to communicate the right materials to each audience.

Expected time: 45 minutes

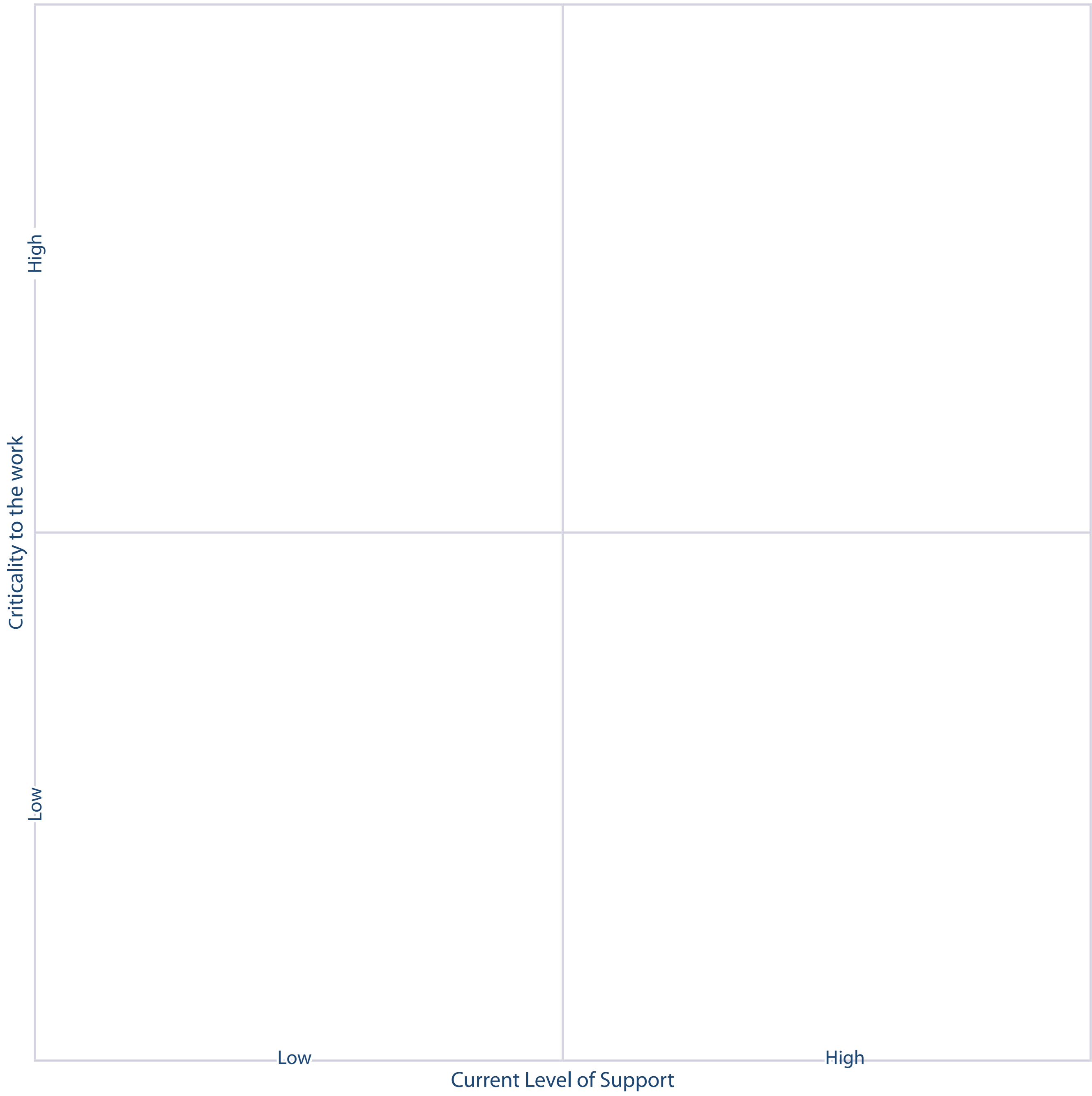
Objective

- Participants will identify key audiences or stakeholders and analyze their current level of knowledge and support to better understand which ones should take priority for a specific issue.

Directions

- Identify a topic or issue that is important to the agency.
- For that topic or issue, brainstorm the audiences whose knowledge and support are central to the work. Record them on sticky notes or cards. Use this list for inspiration:
  - SEA staff
  - Teacher leaders
  - Other teachers
  - Principals
  - Superintendents
  - Curriculum directors
  - Local school board members
  - Parents
  - Students
  - Regional office leaders
  - Business leaders
  - Legislators
  - Teachers' unions
- Place each stakeholder identified by the participants on a 2 x 2 matrix using the Identifying Priority Audiences template, where the axes represent the current level of support and criticality to the work. "Criticality" in this context refers to the role that each stakeholder plays in the work and how important—or critical—that role is to the ultimate success of the effort. The axes could also be changed to represent knowledge or engagement, or other options more appropriate to the State context
- As a next step, list the audiences that were identified as being most supportive and most critical, and use dot voting to identify the top three-to-five stakeholder groups that are seen as most critical to success
- Then, discuss the following:
  - What do we want them to know, and what role do we want them to play in our work?
  - What is the best way to reach our most critical audiences?
  - Why do we want to reach them?

Identifying Priority Audiences Template



4. Creating Core Messages

Rubric Category: Audience-Specific Messages and Diverse Tactics

Objective

- Participants will create core messages to address key questions that can be tailored for specific audiences.

*Complete this section in two small groups, with each group focusing on a particular question from the "Identifying Key Questions" exercise on page 21.

Facilitator Detailed Agenda

Time	Activities
40 minutes	Explain that all strong messaging needs to include elements of all three types of messages: • The **logical** messages are the basic details that answer the in-the-weeds questions, such as who, what, when, where and how • The **rational** messages get to what you want people to understand and believe—the "why" • The **emotional** messages get to what you want people to feel They are the aspirational, broad points that get to the core of the issue and are the "sticky" messages that people tend to remember · This is the core difference between inform (who, what, when, where, etcetera) and inspire (messages that resonate, draw people in and make them want to learn more) Ask participants to brainstorm the logical (who, what, when, where), rational (why) and emotional answers to the questions identified in the "Identifying Key Questions" exercise Record all of the ideas generated during the brainstorm on colored cards Use the Tiered Messages template as a grid and map out the messages and thoughts as they emerge through the brainstorm • Start with a full-group brainstorm; then work as a group to identify the common threads and core messages that emerge • Do not wordsmith; be clear that the exercise is an opportunity to get the broad ideas down on paper and that it will be up to the team to finalize the language after the workshop
25 minutes	Together, discuss and record on flipchart paper the following: • What are the vehicles for communicating these messages? • How will we inform our key stakeholders? • How will we then promote inquiry of our key stakeholders? • How will we involve our stakeholders in this work? • How will we inspire our stakeholders?
15 minutes	Prepare a report for the chief: • Who will share the report on our behalf? • What key points should the report cover?

Facilitator Notes

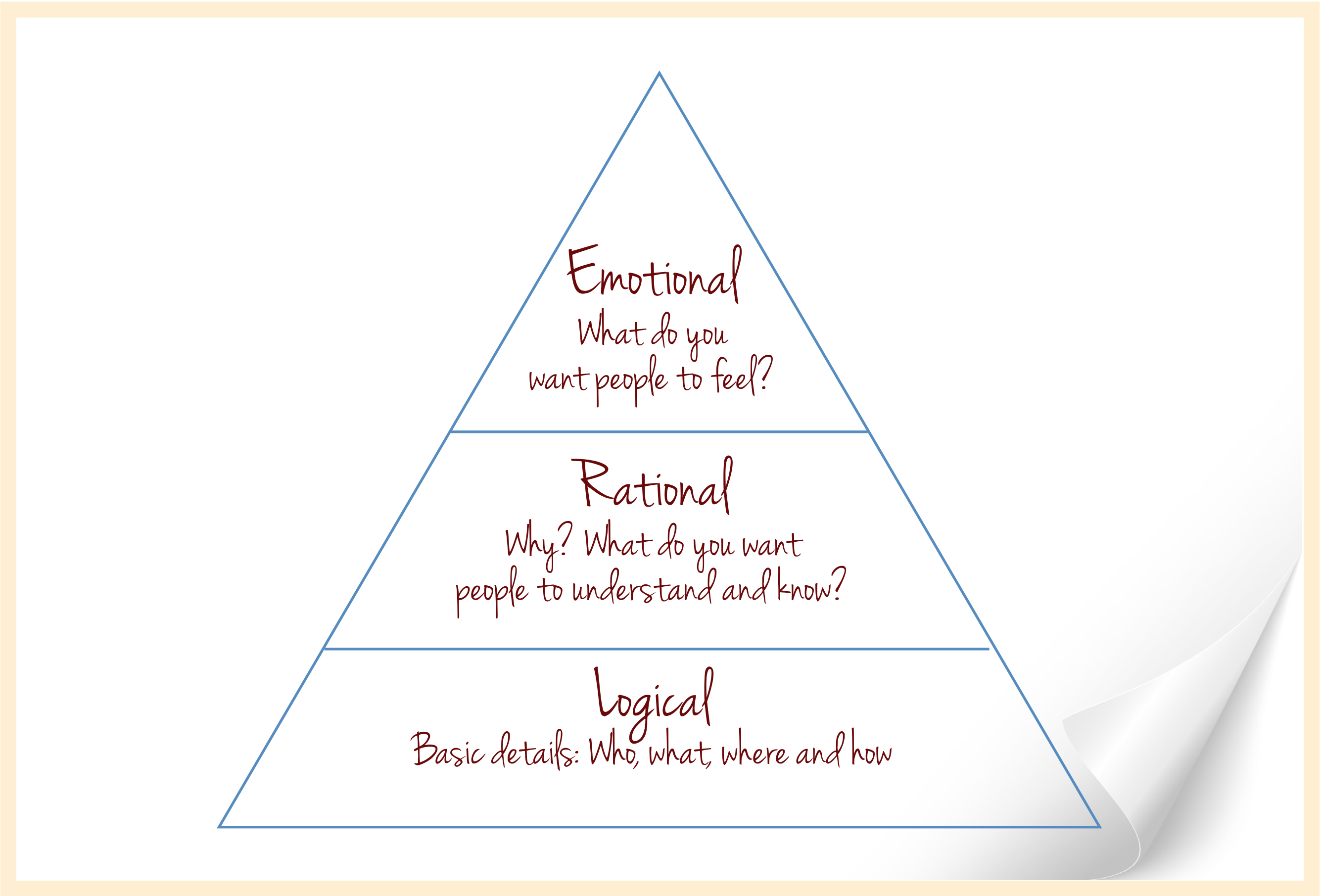
- Use the 4 I's to frame this exercise. Create messages to inform and inspire, and then consider vehicles of communications that can inform, inquire, involve and inspire.
- For the messages, tell the groups not to be too concerned with wording something exactly right; rather, they should just describe general ideas and benefits.

- Keep in mind that the groups will need to share the product of this session with the chief and the other team at the end of the workshop.
- Encourage the group to use the strategies throughout columns three and four in the rubric for ideas as they consider new strategies.
- Push the groups to be as specific as possible when discussing actions, teams, owners and next steps.

Materials/Logistics

- Exercise slide
- Copies of rubric
- Colored cards
- Worksheets with messages
- Flipchart paper
- Markers

Tiered Messages Template (FLIPCHART)



Planning Template (FLIPCHART)

See the full **Creating Audience-Specific Messages Template** in Appendix C.

Message Delivery

Message	Vehicles	Owner
Example: Our new educator evaluation system is designed to provide our classroom teachers with the real-time feedback and ongoing supports they need to improve.	Example: Media, webinars, written materials, face-to-face meetings, Website	Example: Media, webinars, written materials, face-to-face meetings, Website

Facilitator Notes

- For the second half of the exercise, transfer all key messages to the flipchart.
- Group where appropriate, and discuss the best vehicles to deliver each message.
- Assign an owner to each one.

5. Using Multiple Vehicles of Communications

Rubric Category: Audience-Specific Messages and Diverse Tactics

Using a wide range of communications vehicles, including multiple social media tools, can ensure that your message is effectively disseminated to stakeholders. Depending on the issue and the audience, some vehicles may be more effective than others, and multiple vehicles can help to ensure that your message is effectively reinforced. You should complete the exercise about audience segmentation on page 33 before completing this exercise

Expected time: 45 minutes

Objective

- Participants will consider and identify appropriate communications vehicles to reach different groups of stakeholders.

Directions

- Identify a topic or issue that is important to the agency.
- Identify the audiences or stakeholder groups that will need to be reached and/or engaged regarding this topic or issue (using your results from "Creating Audience-Specific Messages," if you completed that exercise). Record them using the Vehicles of Communications template.
- For each audience or stakeholder group, brainstorm the various messages they have received about the topic or issue and the vehicles through which they have received those communications from the agency. For each one, clarify the method or vehicle through which the message was sent (for example, by email, webinar, etcetera), as well as who delivered the message (for example, State chief, district superintendent, etcetera). Record the vehicles using the Vehicles of Communications template.
- For each audience, reflect on the current vehicles used to reach them (see above for examples). Use the relevant rubric row to consider whether these are the most effective vehicles or if there are alternatives that would be more effective. Record your answers using the Vehicles of Communications template
- As a final step, for each audience, discuss how best to ensure the message they receive through each vehicle is coherent, timely and consistent. Record notes using the Vehicles of Communications template.

To brainstorm vehicles, refer back to the 4 I's framework and use these suggestions as a starting point for your conversation:

Sample ways to INFORM:

- Meetings/presentations
- One-on-Ones
- PD sessions/workshops
- Websites
- Op-eds
- Print collateral (one-pagers, FAQs, etcetera)
- Video
- Social media
- Earned media (newspapers, television, etcetera)
- Webinars

Sample ways to INQUIRE:

- Surveys
- Focus groups
- One-on-One interviews
- "Pulse checks" (short surveys)

Sample ways to INVOLVE:

- Advisory committees
- Steering committees
- Partner coalitions

Vehicles of Communications Template

Stakeholders	Vehicles for Communications (existing)	Vehicles for Communications (additional)

6. Using Champions to Move Communications Efforts Forward

Rubric Category: Stakeholder Engagement and Coalition Building

Like-minded partners or advocates can be hugely helpful to SEAs trying to build support and understanding about a specific issue or set of reforms. External partners have their own networks of stakeholders and, when well informed, can play a key role in the implementation of an SEA's communications and engagement strategy.

Expected time: 45 minutes

Objectives

- Participants will identify champions for a particular topic or issue.
- Participants will plan to engage champions in a particular topic or issue.

Directions

- Identify a topic or issue that is important to the agency.
- Identify champions for that topic or issue, that is, stakeholders or partners who can provide support for the topic or issue. Note that these will typically be individuals, not groups. Start with existing champions, but also consider potential stakeholders who can be made into champions. Record them using the Identifying Champions template.
- For each champion, analyze and record the following using the Identifying Champions template and consider:
    - What is the current level of engagement or role of this champion?
    - What is your objective for the champion?
    - What role should the champion play? What should his or her message be?
    - How will you get the champion to play that role? What will it take?
- Use the results of this exercise to enhance your overall plan by incorporating these strategies and partners.

Identifying Champions Template

Champion	Current Engagement or Role	Objective	How Will You Get Them to Play That Role?

7. Engaging Opponents in Communications Efforts

Rubric Category: Stakeholder Engagement and Coalition Building

Every issue is likely to have its opponents. SEAs are wise to engage strategically and proactively with potential opponents to maintain a professional, cordial relationship; help them understand the agency's perspective; and provide them with accurate information. The agency can accomplish these goals by anticipating criticism from opponents, keeping opponents informed of the agency's position on key issues, making an effort to discuss disagreements openly and providing opponents with opportunities to listen and be heard.

Expected time: 45 minutes

Objectives

- Participants will identify primary opponents of a particular topic or issue.
- Participants will develop a plan to engage effectively and work with primary opponents of a particular issue.

Directions

- Identify a topic or issue that is important to the agency.
- Identify three-to-five key people and/or organizations who are vocal opponents of a particular effort or initiative and whose efforts may impede its success. Record them using the Engaging Opponents template.
- Analyze each opponent and develop a plan to engage with them effectively. Consider the following:
  - Why are they opposed to the particular topic or issue? What are their concerns?
  - How does the opponent express those concerns? How do they convey that opposition?
  - What would an ideal, but realistic, relationship look like? What is feasible?
  - What would it take to create that ideal relationship? What would you need to do?
  - Who should be involved in engaging the opponent?

Engaging Opponents Template

Opponent	Concerns/Reasons for Opposition	Methods for Expressing Opposition	Ideal Relationship	What Would it Take to Achieve the Ideal Relationship?	Who Should Engage the Opponent?

8. Identifying and Addressing Capacity Challenges

Rubric Category: SEA Communications Capacity

To effectively communicate with key audiences, an SEA relies on its internal capacity and its ability to leverage external partnerships to extend the reach of its messages. Identifying internal capacity challenges is a first step toward addressing these capacity challenges, either by providing professional development to build internal capacity or engaging external resources.

Expected time: 45 minutes

Objectives

- Participants will consider and identify internal capacity challenges.
- Participants will collaborate on the development of a plan to address internal capacity challenges.

Directions

- Identify the key outreach and engagement activities necessary for the agency to effectively communicate about its work and engage with stakeholders. Record them using the Addressing Capacity Challenges template.
- For each activity, identify:
    - The resources, knowledge or skills you will need to complete these activities.
    - The resources, knowledge or skills of current staff.
    - Strategies to either secure or build the necessary resources, knowledge or skills the agency's team currently lacks.
    - Other stakeholders or organizations to engage.
    - Individual(s) who will be responsible for securing or building the necessary resources, knowledge or skills.

Addressing Capacity Challenges Template

Activity	Resources/ Knowledge/ Skills	Existing?	How to Build?		Who is Responsible?
			Methods	Who to Engage?	

Appendix B:
A Framework for Communications and Engagement

Reform Support Network

From "Inform" to "Inspire"

A Framework for Communications and Engagement

As Race to the Top grantees make far-reaching reforms, shift policies and heighten expectations, communicating with and engaging a wide range of key audiences have grown in importance. Building widespread understanding and support is crucial to the successful implementation and sustainability of proposed State reforms. Engaging educators in this work is essential, but State education agencies (SEAs) have a responsibility to reach out to their many other stakeholders as well.

The Reform Support Network (RSN) encourages SEAs to assess their current efforts to communicate with and engage key audiences and look for ways to sharpen approaches, build capacity and extend reach. The Stakeholder Communications and Engagement Community of Practice (SCE CoP) is developing resources to encourage State leaders to strengthen their work in several areas. To start with, the CoP is helping States craft a **strategy** with specific goals, define internal and external **audiences**, and create clear and compelling **messages**. Those messages, in turn, will require a variety of **tactics** — from face-to-face meetings to social media — to reach their audiences. States can expand their reach by working in **coalitions** and with partners. In the process, States might need to build staff **capacity** to do this work. Finally, the CoP is urging States to **measure** everything and use their data to adjust course as needed.

The communications and engagement framework in Figure 1 provides a way for SEAs to think about and implement these priorities.

This framework recognizes that SEAs will, at a minimum, **Inform** key audiences about their work and changes in key practices, expectations and systems. However, these efforts will be more responsive, less reactive and likely to be more successful when audiences' unique needs are considered and State leaders listen to feedback closely and respond to questions (**Inquire**). In some cases, SEAs will want to actively **Involve** key audiences in the work as active co-creators of policies and programs. Ultimately, the most powerful results will occur when State leaders **Inspire** others to act and lead, based on what they have learned and the policies and programs they have helped develop.

Figure 1. Communications and Engagement Framework for SEAs

Connecting the Dots

The concepts discussed in this framework overlap significantly with Engaging Educators: A Reform Support Network Guide for States and Districts, published in December 2012. That guide focused on the need to engage one key set of stakeholders: teachers and other educators. This framework deals with multiple stakeholders, including educators. And its four action steps are described from the perspective of the SEA: that is, how the SEA can inform, inquire, involve and inspire various stakeholders, including educators. Our inform and involve steps particularly align with the many engagement concepts discussed in more depth in Engaging Educators, such as using feedback loops, joining communications teams and assuming school leadership roles.

Doing a good job of **informing**, **inquiring** and **involving** makes it more likely that audiences will be **inspired** to action.

Involve: Adding more opportunities for deliberate two-way communications, SEA leaders do not just listen well, they also proactively enlist key stakeholders in shaping relevant policies, programs and practices. Staff, parents and community members throughout the State know what is going on because they are active participants. For example, educators help design and improve State professional development offerings and resources. Parents learn how to advocate for their children and serve on school councils. Funders, business and civic leaders serve on advisory groups. Recognizing that active ownership builds understanding and support, the SEA makes a steady effort to extend meaningful opportunities to participate to all segments of the community.

Inquire: SEA leaders listen closely to stakeholders to ensure that messages about key policies and programs are heard and understood. And at the front end, they use surveys, focus groups and other feedback loops, and outreach strategies to learn what educators and other stakeholders think about major policy shifts or new programs — and to use those diverse perspectives to help shape the policies and programs.

Inform: The SEA uses a diverse array of communications tools to provide timely, accurate, and actionable information to a wide range of stakeholders. These tools include Websites, newsletters, video, school report cards, presentations/meetings and media reform efforts.

Inspire: The SEA's efforts to inform, inquire and involve mean that more stakeholders fully understand and support the State's education reform efforts. Stakeholders are committed to the reforms and are actively helping to gain the understanding and enthusiasm of others. They are personally invested in the proposed changes and are proactively helping to implement them.

Doing a good job of informing, inquiring and involving makes it more likely that audiences will be inspired to action. The RSN defines each of these four strategic actions as described above.

There is no sharp dividing line between and among these strategic actions. Depending on the issue, State education agencies are likely to regularly do some combination of *informing, inquiring and involving* activities; when done well, the result should be well-informed, supportive and inspired audiences.

This framework does not necessarily suggest a continuum that progresses from good to better to best. In some cases, providing sound and timely *information* is all that is required. And doing an excellent job of consistently *informing* audiences is a major accomplishment in itself. However, we believe that finding ways to add an *inquiry* or *involvement* component to the work will make it more likely that SEAs' information will be heard — and acted on.

Providing additional opportunities for inquiry and involvement will require a real commitment from the SEA to meaningfully engage stakeholders — that is, supplementing one-way communications with more two-way engagement opportunities that invite stakeholder input from educators and others and have higher potential for creating shared commitment for state reforms. This kind of culture shift will require more collaborative leadership — and the active leadership of the chief and his/her executive team.

This framework and related resources are designed to provide a starting point for those important conversations. Additional details are available at http://www2.ed.gov/about/inits/ed/implementation-support-unit/tech-assist/stakeholder-communications-engagement.html.

Appendix C: Workshop Templates

The templates that follow are meant to be used with the main workshop sessions described earlier in the guide. These can be printed and distributed as handouts or used as a guide when developing flipchart grids before the meeting.

Meeting Expectations Template

Directions: Write your expectations and goals for the workshop.

EXPECTATIONS AND GOALS FOR TODAY

Meeting Norms Template

Directions: Write desired norms or ground rules for the workshop. These may include rules prohibiting cell phones, asking everyone to participate, etcetera.

MEETING NORMS

Strong/Weak Brainstorm Template

Directions: Think about a time when you were involved in a strong communicatios effort in the agency. Write about that experience in the "Strong" column. Think about a time you were involved in a weak effort in the agency. Write about that experience in the "Weak" column.

PAST COMMUNICATIONS EFFORTS: WHAT MADE THEM…	
Strong	Weak

Rubric Introduction Template and Review

Directions: Review each row of the rubric (or selected rows) and place a check-mark in the column that best describes the work of the agency.

	Rating				
Topic	1	2	3	4	Rationale

Identifying Key Questions Template

Directions: Record the most common questions you have received from key audiences about the issue, topic or initiative that you are focusing on during the workshop. Where applicable, note specific audience that posed the question.

KEY QUESTIONS

Creating Audience-Specific Messages Template

Directions: Complete the template for each primary audience identified.

Audience				
Purpose(s)				
Core Messages	Vehicles for Communications	Owner/Team	Timeline	Immediate Next Step

Action Planning Template

Directions: Consider what needs to happen to keep the work moving forward, who should own each action item and what the timeline should be. Record on the Action Planning template.

ACTION PLANNING			
Immediate Next Steps	Deliverables	Owner	Timeline

This document was developed by the Reform Support Network with funding from the U S Department of Education under Contract No GS-23F-8182H The content of this document does not necessarily reflect the views or policies of the U S Department of Education