

# School District Communications & Engagement Planning Worksheet



*Modify this worksheet to fit your needs and community; keep or delete prompts and example text based on what's most helpful to you; and fill out whatever you can as a starting point for a more detailed plan of action.*

## Pre-Step 1: Planning for and Preventing Crisis

It's a good idea to meet with your core staff at least annually to prepare for potential crises. Discuss and write down what you envision might be possible, what you might do to prevent the issue from happening (such as working on school climate and healing activities within your school community), how you'll respond if situations occur, what communication will be, who will lead, and how you might move through short-, mid-, and long-term responses. This planning doesn't ensure that crises won't occur, and it's typically not any one person's fault that causes a major crisis, but it's beneficial to feel prepared.

## Pre-Step 2: Assess Starting Conditions

Use these starting condition questions, modified from the [ODE Decision Tree tool](#).

1. **What is your interior condition?** What is your team's condition? What is the condition of those who are involved? Are you calm and steady, full of turmoil, reacting?
2. **What kind of a situation is this?** Examples: urgent, complex, urgent and complex, foundational, situational, short-term/long-term, etc.
3. **What is your timeline for when you need to act or respond?** What other parameters will support your process? What does harm reduction look like in this state of urgency?

## Pre-Step 3: Investigate

Before planning and taking any action, follow these steps and others that make sense depending on the situation.

1. **Gather and verify information:** Determine the accuracy, completeness, and magnitude of the information you have received. What needs further investigation before proceeding? Was information obtained from more than one person's perspective?
2. **Notify people who need to know what's happening** prior to your public response and before wider engagement begins. Begin with legal counsel and others for guidance and support. Do this in a way that can ensure privacy, such as by phone or in person if the situation is very delicate.
3. **Prepare a document** with information, details, questions, and process undertaken in case you need a clear report and to avoid confusion on your team.

## School District Communications & Engagement Planning Worksheet

### Step 1. Assess the Situation Before Taking Action

Consideration	What do you know so far?
<p><i>What did your thorough investigation reveal and what important details emerged? What needs more investigation? Do you have all possible information before taking action?</i></p>	
<p><i>What do you know about your school community's likely response to this situation? What is the likelihood of escalation?</i></p>	
<p><i>What is at stake or at risk depending on the approach you take and decisions you make?</i></p>	
<p><i>How will people be impacted? Who is likely to be affected most based on how your school district reacts to this issue?</i></p> <p><i>Try to break this out for different groups, such as students who are closest to the issue, community relationships, etc.</i></p>	
<p><i>Who else do you need to talk to to get all possible information and perspectives relevant to the unfolding situation?</i></p>	

## School District Communications & Engagement Planning Worksheet

<p><i>What is there that can be gained or strengthened depending on the action you take?</i></p>	
<p><i>What is in your control?</i></p>	
<p><i>What is outside of your control?</i></p>	
<p><i>Other Considerations</i></p>	

## School District Communications & Engagement Planning Worksheet

### Step 2: List 3 Desired Results

This step helps you work backwards from desired results towards shaping your plan and approach.

Goals	
1	Ex. What will happen with those most affected or at risk?
2	Ex. What will happen for the school community?
3	Ex. What would success look, sound, and feel like?

### Step 3: Plan Engagement

To reach your goals, you'll likely need to engage specific people and groups as part of planning, decision making, and even de-escalation. Who are they, what kind of relationship do you have with them (ex. strong, tentative, needs building), and what will you ask them to do? Add rows as needed.

Group or person	Relationship status	Request

## School District Communications & Engagement Planning Worksheet

### Step 4: Decide on Approach

Having analyzed risks, strengths, relationships, and what's in your control, what steps can you and your team take to reach the desired results? This can be used to create a more robust work plan.

What needs to happen?	Who is responsible?	By when?
<i>Ex. How will coordination and decision making happen? (Try out Oregon's <a href="#">Decision Making Tool</a>)</i>		
<i>Ex. Who do you need to engage in conversation?</i>		
<i>Ex. What resources or supports need to be in place?</i>		
<i>Additional steps</i>		

### Step 5: Create Communication Strategy

Who needs what form of communication? What do they need to hear? What action do you want them to take?

Audience	Communication Method/s	Call to Action
Parents, families & caregivers		
School board		
Staff		
Students		
Others?		

## School District Communications & Engagement Planning Worksheet

### Step 6: Refine Key Messages

For each audience, what do you want them to know? This could be a place to write down stories and examples to ground the message as well.

Audience	Key Message
Parents, families & caregivers	
School board	
Staff	
Students	
Others?	

**Thoughts and reflections:**

**Next steps:**



This worksheet has been modified using a document created by the [Partnership for the Future of Learning](#) that is licensed under their [Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License](#).