

Making Dollars Make Sense

Presented by Tom DeLapp, Communication Resources for Schools

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Presented by Tom DeLapp, Communication Resources for Schools

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Getting to Know Your Presenter



Tom DeLapp

- President
- 40 years experience
- Former ACSA Assistant Exec. Dir.
- 450 school districts served
- NSPRA President
- National & State Award Winner
- Accredited in Public Relations

Our Vision & Approach

Communications counsel to district leadership teams

- Reputation Manager
- Marketing & Awareness
- Communication Plans
- Communication Audits
- Crisis Communications
- Communications Training



What we'll cover today



- Overview of the changing communication environment
- Why your budget is words and ideas; not just numbers
- Make this interactive so we answer your questions
- Best Practices Tips & Techniques
- Provide for sharing advice & ideas

Leadership can be high-stress

- Do you feel like you spend all of your time putting out fires?
- Could effective communication have prevented the “do-overs” in your district?
- Communication is the Key to Leadership!
- The Devil is in the details!



There's no debate about it



Won't you be glad when the elections are over?

Education is often a political football.

“Politics” & Deadlines”

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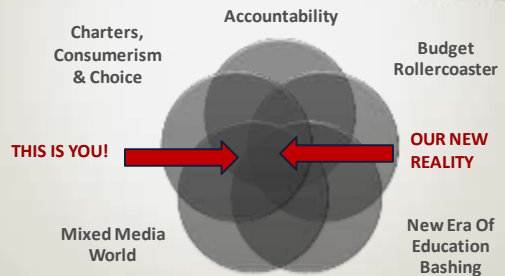
The Rhetoric of Failure

- In 1960s, American public schools were perceived to be the best in the world.
- Today, a common perception is we are failing the nation
 - But by what standard?
 - Does the evidence support the stereotype?
 - A self-fulfilling prophesy?



People swim through shark infested waters to get to our public schools . . . still!

Education's Perfect Storm



Get people inside our apple

Have you ever bought an apple and been disappointed that it wasn't as good on the inside as it looked on the outside?

Our "drive by customers" wonder that too.

The "moments of truth" when our customers come into contact with us is our chance to get them inside our apple.



Can they trust the numbers?

PR =

PERFORMANCE

(Doing a good job)

+

RECOGNITION

(Getting credit for it)

Your Budget Narrative

RESULTS

- Stress Outcomes Over Outputs
- Movement More Than Motion
- Measurable Results
- Sustainable Momentum

Message clarity is crucial



Am I getting through to you?

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Communicating Priorities

It doesn't matter if you're doing things right, if you aren't doing the right things!

Your budget is a priority statement

Blended Communication

Mass Communication to

INFORM

Interpersonal Communication to

CONVINCE

Understanding People Today

- Everyone is an expert on education!
- Diverse audiences with diverse perspectives
- Short attention spans; MTV environment
- Impatient consumers; no brand loyalty
- Want what's best for their kids — NOW!!!
- Care little for chain of command
- Distrust institutions and bureaucracy
- Information overload/access
- "Incredibly busy" even if they're not



Working harder to stay even



Educational employees feel like they are working much harder with less support and satisfaction

We don't have enough time!



I'm so busy I can't even find the time to communicate about how busy I am!

What does the public want?

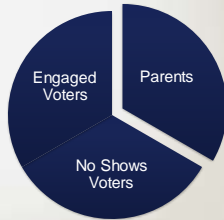
- **Account** • **Ability**
 - How do you measure success?
 - Do you have the ability to deliver on what you promise?
- **The public wants three things in this order:**
 - Safe, secure learning environment
 - Increased performance and achievement
 - **Wise use of tax dollars**

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Convincing a super-majority

- In most communities, 2/3 to 3/4 of the adults don't have school-age children.
- The voter population is skewed toward seniors
- Most voters are not direct customers any more
- So, we need to get people to vote for other people's kids!



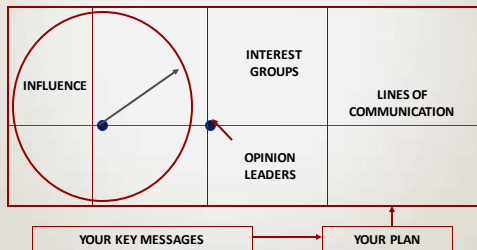
The Hydraulic Fluid for Change

Communication –

- Aligns efforts with objectives
- Builds clarity of purpose
- Coordinates collaboration
- Drives initiatives into actions
- Energizes and engages people
- Facilitates change and growth



Lay down pipelines of support!



Manage Your Grassroots

- Irrigate the "lawn" with a steady flow of information, inspiration, and invitation
- Employees and civic leaders need the tools and arguments to be opinion leaders for you
- Make sure your efforts are sustainable, replicable, pervasive, and consistent
- Identify "dry patches" to prevent weeds



People don't care about your grass seed, they care about their lawn!

Grow Grassroots Support

- Create a Business e-Bulletin
 - Fiscal Facts, Money Matters, Dollars & Sense, The Bottom Line
- Keep people informed about key budget facts and the budget development process
- Produce FAQs and fact sheets
- Publish a Fiscal Annual Report with key indicators of success



Steady drip irrigation works better than a flood

Communication Resonance



- Two-Way Communication with Employees
- Dual responsibility to speak up and to listen
- Managers and supervisors are conduits for messages and feedback
- Use multiple pipelines to ensure connections
- Keep it simple, clear and relevant

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Two-Way Communication

- Make meetings matter, recap w/ consensus
- Email can misconstrue meaning
- Seek clarity in your own mind first
- No gaps in serial communication links
- Direct the information flow into the field through departments and leaders
- Know that information will bypass the chain of command



Community Outreach

- **Reach out to the Animal Clubs**
 - Create Speaker's Bureau
 - Opportunity Calendar
 - Media Kits w/ Budget Basics
- **Connect Opinion Leaders**
 - "Leaders for Learning"
 - State of the District briefing
 - Capitol Visits/Legislator Liaisons
 - Strategic Alliances



Remember the Golden Rule

Resonate grassroots messages all the way to the statehouse

- With grassroots support and an aggressive public awareness campaign about IMPACTS we can get their attention
- Defeat the bias toward tax dollars being wasted . . . Show them results and risks



He who has the gold makes the rules!

Tom's Budget Axiom

When the pie gets smaller or bigger, the first thing to go are the table manners!



And finally . . .

It's better to break your own bad news than to have someone break it over your head!

Frame the narrative about you

Please make the stupid people shut up!



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A loud voice shouldn't rule

- Engage more people in the debate, step up outreach & communication to inoculate people to the negativists
- Use letters to the editor, public comment at meetings, and third-party endorsement to counter-weight critics
- Create Key Communicator Networks and Communication Advisory Committees with a mission



**Got a bad soloist?
Get a bigger choir!**

Getting down to business

Schools aren't businesses, but we should be business-like in the way we manage our funds

Getting down to Business!

**PRODUCT
=
LEARNING**

Our customers are co-producers of and investors in that product, but they may not know it

Be a profitable investment

**PROFIT
=
PERFORMANCE**

Defining our bottom line "profit" is both individualized and societal

Our Bottom Line is . . .

RESULTS

We stop bad things from happening
We enable good things to succeed
We build communities of support
We clarify the critical messages

A Community's Bottom Line

- **Great schools are good for business**
 - Quality of life, business climate, housing values
- **Competitive graduates**
 - Mean better workers and consumers
- **Public safety improves**
 - Protective services costs go down
 - Invest in schools to save money on other services



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School Success Is a Community Asset

Where we are **Where we want to be**

Education is the transformational engine of our society

Our bottom line is to fulfill this expectation by preparing highly functioning, capable adults

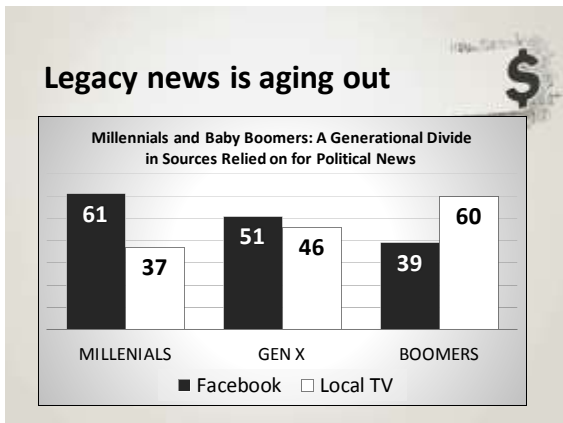
It's A Mixed Media World

20th Century
A One-to-Many System

Edited BEFORE it was posted

21st Century
A Many-to-Many System

Edited AFTER it's posted



Communication Mobility

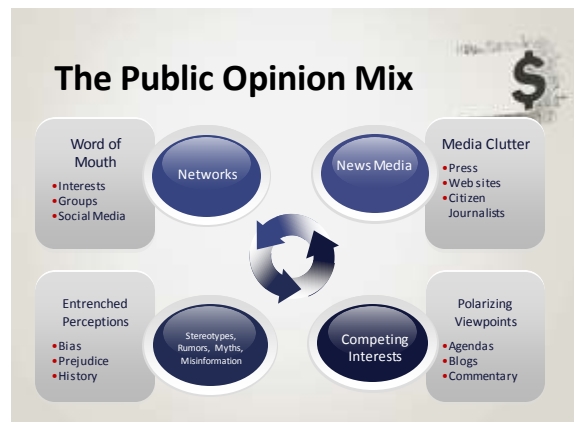
- We don't communicate to a place or set time anymore
- People define how they want to receive information through filters they choose
- People can get on-demand or intrusive updates on issues, products, programs and interests
- People aren't just information recipients anymore; most can and do create content

Mass Personalized Information

The Modern Day Side Arm

- We've become our own mobile multimedia news network
- Smart phones are the "weapon of choice" to contend with a hectic life
- The phone is a common denominator in a mixed media world to reach all stakeholders
- Phones bridge the digital, generational and language divides
- Smart phones enable instantaneous access and transmission

**WMD
Weapon of Mass
Distraction**



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Self-Selected Ignorance

- We fill our own silos with information that reinforces our bias, stereotypes and belief systems
- Fake News is growing because it is profit driven
- Vetting accuracy is tough
- Impulse decision making



**INTERNET
ILLITERACY**

Leaders manage reputations

Build a reputation, don't just let it pile up

- I will support your organization if I value what you do, know about it, and see that I have a place in it
- Plan to manage your reputation
 - No random acts of PR or drive by PR stunts
 - Sustained, pervasive, reinforcing efforts that nurture and enhance your reputation and image
- PR isn't one person's job, it's everybody's job!
- Make sure people know about you and your success

We achieve critical mass when ...

The public has a sense of shared ownership or common belief

There

Personal Interest
Aligns with the
Public Interest

Public Schools

But how do we reshape public perception?

Reputation Management

Be Their Primary Resource

- Be an effective resource and the official information clearinghouse about you!
- Audit your web page to see how user friendly and current it is
- **Structural web site mistakes:**
 - Digital Filing Cabinet
 - Table of Organization Structure
 - Telephone Directory
 - Encyclopedia of USD
- **Information ≠ Communication**



Be Your Own Wire Service



You want to define yourself well and be the Internet entry point for stakeholders

- Be clear on where the "latest" stuff is
- Have people judge the media by what they already know about you and not vice versa
- Have a "Setting The Record Straight" page to correction misinformation and beat back rumors
 - "Media Watch" page
 - Attack stereotypes & myths
 - Challenge the blogosphere here

Be the answering service



When I Google you I ought to get you

- "If I can't get facts from you, I'll go somewhere else . . . fast!"
- Be a one-stop information shopping mall for your school district
- **Make your site user friendly**
 - FAQ-based and easy to navigate
 - Shelf date information! Restock your shelves occasionally
 - Summarize & head note posted documents
 - Index your contents

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Be your own message center



Why should I put my kids in your schools?

- Be message-driven, not data-driven
- Correlate and integrate into themes
 - Safety, culture & climate
 - Academic progress & performance
 - Quality of instruction & rigorous curriculum
 - Options, interventions and opportunities
 - Using tax money wisely
- Market your district with messages
 - Your web site needs to magnetize and sell your district. Are key messages evident on your home page?

Relationships Are Crucial

Remember:

It's awfully hard to be unfair to someone you know!



Relationships see us through good and bad times

We need a "relationship" with our community

Practice Public RelationSHIPS!

What do organizations run on?

RELATIONSHIPS!

- ▶ If the average school district has 1,000 employees, that results in **one million** possible one-on-one relationships
- ▶ If you just add one more person (a third dimension) into that connection matrix you have more than **166 million** possible ways for relationships to short circuit!
- ▶ How do we build solid relationships?



Who's your #1 customer?

- When Steve Jobs came back as Apple Computer CEO he had to re-convince Apple's #1 customer
- #1 customers are the people who make, sell and administer your company's products
- If they aren't sold, they can't sell anybody else!



Employees are our #1 customer

How do I fit into the picture?



When people don't see the bigger picture they are more susceptible to stereotypes and negativity. Effective leaders give people a sense of the whole puzzle.



When one person is out of step we tend to focus on that and not the whole picture

Create Raving Fans

- Our district/school has ___ employees.
- If each one sets a personal goal to convert one person a month (10 per school term) to be a school supporter we would have _____ fans in our community!
- What can we do with that many supporters?
- **Anything we want!**
- What if we doubled that with community voices spreading the news to their friends?

A Pandemic of Popularity!

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People will judge you on –



How you make decisions

- Quality of the process
- Confidence in methods
- Accuracy of fact base
- Timeliness of actions
- Faith in the deciders
- Alternatives discussed

What decisions you make

- Fair and just
- Clear standards
- Precedence involved
- Over-riding impacts
- Sense of resolution
- Equitable outcome

Create a Budget Lesson Plan



- An overall long range strategy to build fiscal awareness
- Make it a continuous improvement process in the way you talk about budgets
- Ensure that the right people are “in the loop”
- Credibility takes a long time to build and a short time to lose
- One wrong number raise doubts



Don't practice
Ready, Fire, Aim!

Budget Calendar is a Lesson Plan



- Audit from last year
- Interim Budget Reports
- Special Legislative Sessions
- Governor's Budget released
- Legislative Committee Analysis
- Enrollment calculation dates
- Preliminary budget adoption
- Final budget adopted
- State budget enacted
- Unaudited Actual Financials



Budgets are Blueprints



The budget is a blueprint and a schematic for your district.

- Roll out your budget; don't sneak it out
- Make it User Friendly; Budget for Dummies
- Portray budget categories and figures against strategic goals to give “cause and effect”
- Create a “How Do We Compare” fact sheet
- Display how much of each district dollar goes to specific things
- Have a budget workshop for parents/leaders
- Make it Personal



Show them the
specs!

Investing Resources in Results



- Return on investment attitude
- Track how dollars make differences
- Show efficiencies and cost effectiveness
- Correlate budgeted accounts to student achievement and school performance



Give stakeholders an
investment portfolio
when you report on the
budget

Choose your words carefully



- Words are important
- Words can help and they can hurt
- Think before you speak
- Use words as bridges not bats



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Translate numbers into words



- Don't just use spreadsheets! Spreadsheets are like hieroglyphics to most people
- Your job is to decipher and translate numbers into words and key messages
- You need people to "learn" about your budget
- Words tell the story, but be graphic in the way you tell it



The Power of Punctuation



An English professor wrote this sentence on the board and asked her class to punctuate it correctly.

"A woman without her man is nothing"

How would you punctuate it?

All the males in the class wrote:

"A woman, without her man, is nothing."

All the females in the class wrote:

"A woman; without her, man is nothing."

LESSON: Point of view leads to miscommunication!

Speak with one clear voice



Find a partner. In 30 seconds, simultaneously tell each other the three best things about public education, speak at the same time you're trying to listen.

What did we hear? Noise!

Now, simultaneously repeat these words as a group:

"Quality, standards, responsive, safety, accountable, impact, achievement, success!"



Now what did we hear? One clear message!

Be a Strategic Listener



- Avoid "Cross Talk"

– Don't be too busy talking to hear

- Integrate advisory systems

– Use an Agenda Management System

- Listen to the community heartbeats

– Compile data from surveys, issue tracking, research, focus groups, study circles, forums, Speakers Bureaus, online input, . . .



Minority Rules



- Problem with engagement is we tend to engage the usual suspects who want to fix us, criticize, protect their turf, or get something from us
- How do we get past the 10% who keep sucking up our attention?
- The Collective Cowards and Individual Heroes Syndrome

Most people like you unless you give them a reason not to



Engage people in the budget



- Advisory mechanism to whom?
 - Superintendent, CBO, Board of Education

- Types of input mechanisms

- Public comment at school board meetings
- Town hall meetings and community forums
- Study Circles with small group discussions
- PTA/Parent club briefings and Q&As
- Digital suggestion boxes (idea harvesting)
- Surveys (web based or e-mail)
- Community Leader Advisory Committees
- Budget Advisory Committees



How do they all link together?

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Budget Advisory Committees



General concepts

- Promote organizational ownership of the process as valid, legitimate & worthwhile
- Be clear about the purpose, role and limits of any advisory process
- Balance perspectives that checkmate “lobbyists” and ensure diverse viewpoints
- Demonstrate genuine, responsive listening for priorities and interests; keep a record of those inputs and ideas
- Give ample opportunities for input, reflection and decision-making. Be open to non-traditional, innovative ideas

Advisory Group Membership



Committee composition

- Diversity of membership
- Varied perspectives at the table
- Organizational and independent members
- Parent leaders
- Foundations and partners
- School Board liaison, but not a dominating role
- Civic leaders with financial backgrounds
- No drive-by members or fair weather friends
- Not too management heavy

Getting responsible advice



- Use the advisory system to “absorb” the public comment demonstrations at Board meetings and to diffuse “public pleading”
- Work the problem, not the people by having protocols and standards in place
- Have members work from an interest base not a position base
- Educate members first by giving them enough information and data to make good choices and overcome stereotypes, misperceptions, and bias

Things to keep in mind



- Set a realistic financial goal/target to meet
- Start with priority setting, not laundry lists
- Ultimate authority is with the school board, not the committee
- Talk about what programs you’re saving not just cuts
- Forced choices promote shared accountability
- Quantity of input on a single subject, program or issue doesn’t mandate its adoption
- Push for consensus, but do not enable negativists to veto ideas by just saying “no”

Things to watch out for



- Witch hunts or vendettas on people or programs
- Nest feathering for pet projects and people
- Red herrings to divert attention from vulnerable programs
- Using budgeting as a prelude to labor negotiations

And now the news . . .



- Manage your media message & Frame the public conversation
- Create an IEP for every reporter, blogger and columnist
 - Educate the media: most reporters weren’t math majors
- Set up regular budget briefings
- Create a Budget Watch update link on your web site



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Practice Rumor Control

- Rumors can't be stopped, they're like water running downhill
- They can only be channeled so they don't erode your support
- Rumors win on speed and quantity. Give them quality and they become key communicators
- "Sell" key communicators and rumorists on your budget decisions so they don't become negativists, passive aggressive, or saboteurs



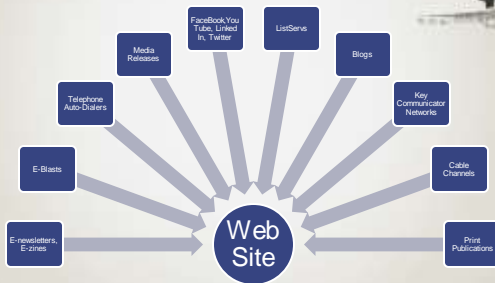
Communication immunizes people to the "negativity virus"

Be transparent, timely

- **Communication toolbox**
 - E-bulletins and e-mail updates
 - Listservs, blogs, podcasts and chat rooms
 - Use Twitter as a traffic manager
 - Key communicator networks
 - Print materials (FAQs, fact sheets, visuals)
 - District/school site displays, bulletin boards
 - Speakers Bureaus and message mapping
 - Meeting agenda management
 - Media relations, editorial boards, media kits



Integrate Your Tools



Make Dollars Make Sense

- Active titles on all graphs, charts
- Personalize the numbers
- What does 1% represent?
- Use numbers and percentages
- Back up key messages with evidence, facts and data
- Explain ending fund balances
- Make it simple and straightforward



Be a fiscal compass

To build credibility, you must be:

- Ethical, legal & honest
- Transparent & forthcoming
- Consistent & dependable
- Accurate & reliable
- Future focused & visionary
- Collaborative & cooperative
- Don't use the budget as a weapon



Stay out of "Hurt Lockers"

Land Mines and Income Extinguishing Devices (IEDs) to avoid:

- Inflated Retirement Plans
- Ending Fund Balances
- Accounting Inaccuracies
- Customer Service Gaffes
- Contracts and Bidding Issues
- Facilities Oversight & Planning
- Faulty Projections about Money or Students
- Poor Communication or Stakeholder Engagement



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Get them inside the budget



The stars in your apple are People & Programs

Staff carry seeds of doubt or support

How you build them into a service team defines your leadership



Axioms For Fiscal Leaders



- One-time money can certainly ease the pain, but it cannot cure the problem
- Financial roller coasters aren't fun to ride; they're scary and can hurt people
- Live within your means each year by all means possible
- People want their CBO to be a realist, a pragmatist, and an optimist
- It's not what you do; it's how you explain what you do that counts

Axioms For Fiscal Leaders



- Schools aren't businesses, but they can and should be business-like
- A student's face and future are imprinted on every dollar bill you spend, save or cut
- If it was easy anybody could do it; be prepared to make tough choices
- You are unique in a sea of educators so bring that perspective to the table
- Don't be ruled by the loudest voice in the room

Questions & Comments



My top five lessons learned

- ▶
- ▶
- ▶
- ▶
- ▶

For further information



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