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**Communications Plan**

**Assessing School Services: Best Practices for Making Services Transitions**

1. **General Information about Academy**

The Academy is a K-8 charter public school authorized by (name of authorizer). Located at (address), the Academy began operating in (date) under the management of (name of company). Management provides (list of services). Management also directs (further services). The Academy Board contracts directly for operational services, such as maintenance of the facility (through a lease arrangement with \_\_\_\_), food services (through \_\_\_\_\_\_) and transportation services (through \_\_\_\_). The Academy Board also contracts with (name of vendor) for all of its HR functions. Compliance and finance/budget reporting and preparations are managed by the business manager, who is employed by (name of employer). All contracts, including the charter contract, formally terminate on (date of termination).

Notably, management’s overall responsibilities are to operate the Academy in accordance with the charter contract, meeting or exceeding any and all goals established in the charter contract and by the Academy Board. Specific details surrounding all services performed by both organizations are outlined in service agreements executed between the Academy Board and the identified provider.

In a management relationship, it is incumbent upon board and management to establish systems and processes and/or tools that help ensure to the authorizer that, generally speaking:

* Academic outcomes are being achieved;
* Taxpayer’s dollars are being safeguarded;
* The climate and culture are conducive to learning; and
* All operational services/requirements are satisfied

The Academy Board is interested in reviewing its future vendor options. Because of the precarious and tenuous nature of this structural change, clear, consistent and frequent communication must be considered. In all vendor transitions, many parties are directly impacted while others are deeply interested. Given the interest of the parties involved, the tone and tenor of messages may change; however, all messages should recognize that students and their families are of utmost concern and will be of primary consideration in all future vendor decisions made by a board.

This Communications Plan, then, outlines the following components regarding a vendor transition at the Academy:

* Communications Purpose
* Impacted Parties
* Communications Spokespeople/Spokesperson
* Communications Content
1. **Communication(s) Purpose**
* To ensure general awareness and transparency in the Academy Board’s decision regarding vendors and the process used to inform new vendors
* To educate the general public on the charter school strategy and its accountability structure (general education and information)
* To demonstrate the Academy Board’s proactive approach in communicating with all stakeholders
* To alleviate concerns and dispel myths and misconceptions about the Academy and its future
* To articulate the Academy Board’s commitment to students and student achievement as well as its commitment to its strategic goal of becoming a high ranking public school, nationally and internationally
1. **Parties of Interest**

As indicated below, several critical groups and/or agencies will be impacted by the Academy Board’s decision to both initiate a Request for Proposal (“RFP”) process as well as secure a new vendor/vendors. It will be important to articulate that the future of the Academy remains stable; that the Academy Board’s decision to review its vendor options is about ensuring students and families are receiving the educational experience they deserve; that the Academy Board has both the authority and the responsibility to protect and preserve the educational environment of the students it serves. ***With all groups and/or agencies identified below, the ultimate goal of strategic messaging is to ensure continued confidence in the educational environment at the Academy.***

***See attached for primary and secondary parties of interest***

1. **Communications Spokesperson/People**

All communications should flow through the Academy Board President. It is recommended that the Academy Board take formal action appointing the Board President to function in this capacity, creating a public record for all to follow and recognize. Under no circumstances should Academy staff or leadership formally communicate on this topic. During the RFP process, it is strongly encouraged that the Academy Board’s attorney, in addition to the Board President, speak on issues surrounding the *process* of pursuing a new vendor/vendors. It is possible that the authorizer will become a part of the communications’ channel simply through the nature of its role. Communications should be coordinated with the authorizer and whenever possible, the authorizer should refer parties to the Academy Board President. To present a unified front, however, the authorizer should be comfortable articulating its support for the Academy Board relative to this service transition action.

1. **Communication Vehicles**

There will be opportunities to communicate, verbally, the actions and activities of the Academy Board; however, inasmuch as possible, communications should be documented through written statements, letters and/or reports (reports as appropriate and practical). If communications occur via telephone, the Academy Board President should be prepared to capture the essence of the discussion(s) through a follow-up email. Communications, then, will likely take place in the following formats:

* 1. Written Statements/Letters/Reports
	2. Board Agenda(s)[[1]](#footnote-1) and subsequent meeting minutes
	3. Telephone Conferences
	4. Public forums (as described below)
1. **Communications Content**

As indicated above, the ultimate goal of an effective communications campaign is to ensure that confidence in the Academy’s future is maintained. At no time should the Academy’s stakeholders lose confidence in the Board’s ability to effectuate positive change through a service transition. For the most part, the content of the message is going to be similar; however, timing of the delivery may differ. Below is the list of parties as identified above with proposed content and timing of the respective message(s):

***Critical Parties:***

* ***Current Vendor***: Using the existing vendor agreement provision(s) for termination as the Board’s guide, the current vendor should be informed as soon as practical of the Board’s decision to initiate an RFP process as well as the Board’s desire to, potentially, terminate any existing agreement earlier than the formal termination date of (date of termination). All Board decisions regarding this existing relationship should be publicly disclosed during its monthly public board meeting(s). The Academy Board should be involved in discussions regarding transition and work on establishing clear expectations with new vendors and existing vendors. The content of the message with the existing vendor regarding the transition should be consistent with what the Academy Board has shared, to date, with vendor regarding its performance concerns. Most important to the message is the fact that vendor has not performed or has not demonstrated its ability to perform consistent with the terms and conditions of the charter contract executed between the Authorizer and the Academy Board of Directors. (*Note: A chronology of meetings/documentation/discussions should be developed as support for the Board’s decision to terminate the relationship.*)
* ***Staff:*** Vendor transitions naturally cause staff to become anxious about their future with a school. The Academy Board will be very candid and transparent with staff about its future vendor relationship(s). Being clear about the process andwhat it means for them will be an important messaging component. It is possible that existing staff will be working under a new vendor in the future or not be invited to return to Academy next school year. Regardless, change will be inevitable for staff. Managing this change, effectively, will become the responsibility of the Academy Board. John Kotter (Harvard Business School) offers an 8-step change model, which is attached for use and reference. Notably, Kotter suggests opening an “honest and convincing dialogue about what is happening in the marketplace and with [your] competition.” This conversation is designed to create a sense of urgency among leadership and staff – an urgency that will transfer into understanding, appreciation and respect for the desired transition. It may be in the Board’s best interest to engage staff in forums where they can provide input and feedback before and during the RFP process (these forums should be coordinate with employer of record for staff). It is recommended that these forums begin following the public action taken by the Academy Board on initiating the RFP Process in (month) and before the RFP notice is issued in (month).
* ***Students and Families***: As indicated above, the primary objective to transitioning vendors is to afford Academy students and families a better educational opportunity than what has been offered to date. Recognizing this, the Academy Board may consider the following script: *It is the belief of the Academy Board that a vendor more closely aligned to the educational philosophy of the Academy Board will effectuate improved learning outcomes. The Academy Board is committed to building a world-class public school recognized nationally and internationally for its consistently high performance. While the Academy Board appreciates the work of vendor, to date, the Academy Board is looking forward to entering a new phase of its life cycle with a company that understands both the personal and academic priorities of the students we serve*. The Academy Board may consider establishing periodic forums for students and families as it navigates the service transition. The first forum may occur following the first forum with Academy staff in/on (Date/s). The first forum could be used as an informational session sharing relevant information and receiving valuable insights and input from Academy students and families; subsequent meetings could be established based on student and family timing preferences and the level of desired input into the process. Critical to a successful transition is keeping all relevant parties informed, especially students and families.
* ***Authorizer***: As events unfold and the RFP process is initiated, the Authorizer should be informed along the way. Securing a new vendor may require a contract amendment that must be coordinated with the Authorizer in an effort to comply with its process for amending the charter contract. The Academy Board will coordinate communication frequency with the Authorizer to determine how much and how often it would like to be informed of activities/progress.
* ***Michigan Department of Education (“MDE”):*** The MDE is an impacted party inasmuch as negotiated agreements affect the charter contract. As indicated above, the Academy Board will coordinate with the Authorizer; the Authorizer will, then, likely communicate any changes to the MDE. Like the Authorizer, the MDE has a process for ensuring that the charter contract reflects, accurately, what is occurring at the school level.

***Interested Parties:***

It will be important for the Board to take advantage of the educational opportunity it can lend to any “interested party,” as it transitions services. The Academy Board will not assume that the groups identified above understand the structure under which charter public schools operate. As inquiries are made, the Board will be prepared to share with groups that the non-profit charter school board is responsible for making decisions regarding the operations of the Academy; that, in that capacity, boards can either delegate their operational responsibilities to a third-party provider or assume the responsibilities, themselves. In this case, the Academy Board has chosen to delegate its responsibilities. In doing so, however, the Academy Board recognizes that it has not, cannot and will not abdicate its authority – that, by law, it is the Board that is ultimately responsible for the outcomes achieved at the Academy and when any board determines that the outcomes are not aligned with those outlined in the charter contract or those outcome goals established by the Board, it is forced to make some very critical decisions and, in the case of the Academy Board, it has decided to review alternative vendor options. The graphics (attached) may help the Academy Board in formulating its discussion(s) with all parties.

1. [↑](#footnote-ref-1)