

Aligned and Coherent Communications to Serve the Whole Person:

A Workbook for Strengthening State Education Agencies' Strategic Communications

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This guide was developed by WestEd as a resource for states and districts based on several states' participation in peer-to-peer collaboratives on alignment, coherence, and strategic communications offered by the Center to Improve Social and Emotional Learning and School Safety at WestEd.

We are especially grateful to Be Clear, who worked deeply with four state teams to deepen their knowledge and develop strategic communications plans. This guide shares the tools that Be Clear provided to these states and offers insights based on the state teams' experiences using these tools as well as Be Clear's extensive experience in advising state and federal government agencies, national and local political campaigns, philanthropy, nonprofits, and the private sector.



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INTRODUCTION

Educators and the public are increasingly acknowledging the importance of serving the "whole person" as essential for achieving equitable education outcomes. Whole-person initiatives recognize that students' learning and development must include not only their cognitive development but also their physiological, social, and emotional development (Walrond & Romer, 2021). Science shows that these domains develop together and that health and well-being in one domain bolster the health and well-being of the others (Cantor et al., 2018). Moreover, integrated approaches to learning result in improved academic and other outcomes (Durlak et al., 2011; Carneiro et al., 2007).

Although state education agencies (SEAs) often deploy new whole-person programs and initiatives, many of these efforts fail to achieve desired outcomes, in part because they operate in fragmented or uncoordinated silos that create barriers to effective implementation (Center to Improve Social and Emotional Learning and School Safety, 2019). To support SEA leaders in serving the whole person and advancing equity, WestEd published a suite of guides on alignment, coherence, and strategic communications.

The guide Serving the Whole Person: An Alignment and Coherence Guide for State Education Agencies (Walrond & Romer, 2021) is organized around six interrelated domains of alignment and coherence: Goals, Funding and Policies, Strategic Communications, Stakeholder Engagement, Capacity Building, and Data Use. Figure 1 shows the relationship between strategic communications and the other activities described in the SEA Guide.

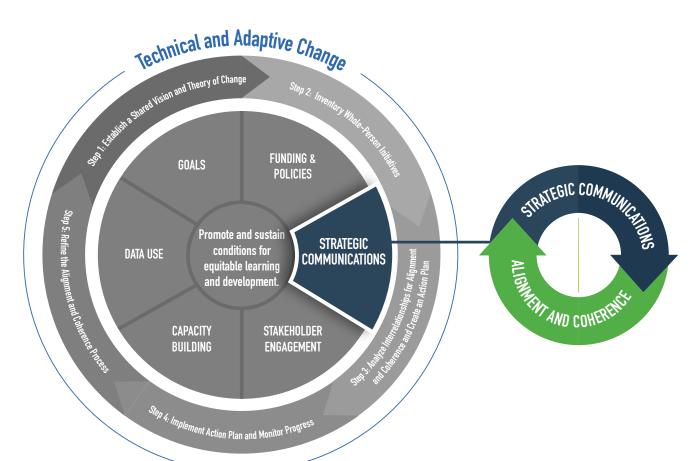


Figure 1. The Relationship Between Strategic Communications and Alignment and Coherence

Strategic communications is an especially powerful domain because it is both a *critical engine* of alignment and coherence and an *important outcome* of the work. Strategic communications is important for building awareness, engagement, and commitment for serving children and youth. When this communication is bidirectional, it also creates avenues for leaders to receive timely, honest feedback from stakeholders about the effectiveness of this work.

This Strategic Communications Workbook is designed to be used by SEA leaders as a companion to Serving the Whole Person: An Alignment and Coherence Guide for State Education Agencies in order to aid in the design and launch of their strategic communications efforts. WestEd assembled this workbook in collaboration with Be Clear, a communications and strategy firm, after working together with their experts to support several state teams with strategic communications work as a key strategy to help strengthen the alignment and coherence of their whole-person initiatives.



STRATEGIC COMMUNICATIONS: AN OVERVIEW

Strategic communications is defined as communicating purposefully to advance a mission (Hallahan et al., 2007). More than just effective communication, strategic communications helps ensure that all stakeholders understand, support, and ultimately contribute to the desired changes by allowing them to "see" themselves in the work.

When strategic communications across whole-person initiatives is aligned and coherent, SEA leaders provide clear and consistent messaging about how initiatives work together to meet the needs of the whole person. Further, that messaging is tailored for stakeholders (e.g., policymakers, state-level leaders, community-based partners) and is strengths based (including the assets and aspirations of students, families, and communities as well as their needs).

Ultimately, strategic communications should also enable all stakeholders to provide honest and transparent feedback to leaders about this work — and SEA leaders, in turn, ought to incorporate that feedback in their decision-making. Allowing audiences opportunities to provide input and demonstrating that this input is taken seriously and incorporated regularly will strengthen the overall approach to communications and goal setting and also the commitment of stakeholders. It is also crucial from an equity standpoint that stakeholders who may not typically be involved in decision-making or whose perspectives are often overlooked — such as those from historically marginalized groups — are involved in shaping messages that impact or are about them.



NAVIGATING THE WORKBOOK

This workbook is not a research brief on communications. It is an active tool grounded in best practices for communicating with internal and external stakeholders and based on practical experiences of SEA leaders as they worked with WestEd and Be Clear to develop strategic communications plans for their whole-person initiatives. As such, it is designed to be used as a companion tool to *Serving the Whole Person: An Alignment and Coherence Guide for State Education Agencies*. (However, this overall approach for strategic communications can also be used in support of other SEA goals and strategies.)

To begin, Be Clear always asks participating organizations and individuals - in this case, SEAs and their leaders - to consider the following question:

"In order to accomplish your real-world goals, who needs to know, understand, or believe what?"

Building from the response to this question, a strategic communications plan will include four elements: goal, audiences, messages, and tactics. These elements form the four major sections of this workbook, which is designed to be a pragmatic tool containing step-by-step instructions and templates for practitioners and their teams to follow. Once completed, these templates will form the basis for a strategic communications plan for an SEA's whole-person work. Each section of the template is accompanied by examples of completed sections that may be used as guidance on scope, length, and language. Figure 3 shows the strategic communications template to complete in steps as progress is made through the workbook.

Figure 2. Strategic Communications Plan Template

Goal: Your goal will appear here following Step 1.

For each goal, complete the following table in Steps 2–4 in this workbook.

Audience	Desired action and messages	Tactics

Note that all template examples use simple, straightforward language. This workbook encourages users to avoid complex, technical terminology when communicating across departments and stakeholder groups. Although there are instances calling for the use of highly technical language or complicated explanations with a particular group or to communicate a certain concept, it is recommended to start with plain language.

The examples below and throughout this workbook are from a hypothetical SEA that is working to support school districts as they implement whole-person initiatives. As is often the case, there are multiple departments within this hypothetical SEA that offer resources and support to districts for various aspects of whole-person initiatives, including social and emotional learning, school safety, and family engagement.

While using the workbook prior to launching any major whole-person initiative is ideal, it can also be used to refine or reframe communication about an existing initiative. Users should revisit the completed plan often both to check in on progress and to continue refining the messages and tactics. Refinement may occur as progress toward a goal is made, new audiences become available or prioritized, or new information about how messages are being received emerges.



STRATEGIC COMMUNICATIONS STEP 1: GOAL

Determine the strategic communications goal

Why are we doing this? What do we want to happen?

A strategic communications goal should be in direct service of the overall whole-person alignment and coherence goals of the agency or department. Chapter 3 of the *Alignment and Coherence Guide for State Education Agencies* offers guidance on creating an overall action plan and defining "SMARTIE" goals that are specific, measurable, ambitious, realistic, time bound, inclusive, and equitable. The focus on inclusion and equity in the alignment and coherence goal should carry over to the strategic communications goal: the communications plan should address those most in need of whole-person supports, and throughout the development of goals and messages, users will need to acknowledge, examine, and consider how to disrupt systems and power structures that maintain inequity. Consider who specifically the strategic communications goal serves and who benefits from the messages and tactics that stem from it.

A strategic communications plan is one of several tools that can assist with achieving overall alignment and coherence goals. To determine the strategic communications goal, consider how effective communication with one or more entities can address the problem at hand. What specifically could change as a result of strategic communications? Writing this down as simply and straightforwardly as possible will lead to clear identification of what actions are asked of the audiences in later steps.

Focus on action and achievability; rewriting goals as the work advances and new communications challenges and opportunities are identified is recommended during this process. The main point is to think about what the best-case scenario would be if the strategic communications plan works as it should.

To increase the likelihood of success, ensure that the strategic communications goal is consistent with the agency's stated mission and is shared among those leading the work. If the goal is not at least

generally shared by those whom the plan is intended to influence, consider starting with a goal of cultivating a shared vision for whole-person work. (For more, see "Chapter 1: Establish a Shared Vision and Theory of Change" in the SEA guide.)

Also, consider how the strategic communications goal can be framed to focus on assets or strengths rather than on deficits or challenges. Often when trying to solve a problem, especially one involving diverse students and their families, SEA leaders and others tend to focus on the challenges a group encounters rather than the unique community and cultural assets they can leverage. Taking an asset-based approach will not only invite audiences to similarly reframe their thinking but may also invite solutions that better involve primary stakeholders and are ultimately more effective and equitable.

For example, if the strategic communications goal is to align programs to improve test scores for Black students, then rather than focusing on academic underperformance, the goal could be reframed to highlight the strengths of these students and the conditions — including learning environments and relationships — that will help them achieve academic success. With this shift in perspective, the approach to finding a solution changes not only from deficit to asset but also from "doing for" to "doing with" students.

Hypothetical SEA Action Plan Goals:

- Districts and schools will be able to implement Social–Emotional Learning (SEL) systematically to improve the health, safety, and wellness of all learners.
- Initiatives aimed at supporting students' well-being will be aligned across the agency so they can serve as a model for districts to integrate and align their own whole-person initiatives accordingly.
- All departments within the agency that serve the whole person will use common language and definitions so that technical assistance will be consistent and coherent across regions and districts.

Example: Hypothetical SEA Strategic Communications Goal in Template

Goal: Align common language across various departments within the agency so that technical assistance will be consistent and coherent across regions and districts.

Your Turn: Add the Strategic Communications Goal to the Template. Goal (Draft)

Step 1. Self-Check

- Is the goal statement...
 - o (Y/N) consistent with the organization's stated mission?
 - o (Y/N) clear, especially to key stakeholder audiences?
 - o (Y/N) action oriented?
 - o (Y/N) shared by, or at least supported by, those leading this work?

If the answer is "no" to any of these, consider revising the strategic communications goal below.

Goal (Revised)

Please insert your revised Goal statement into the Strategic Communications Plan Template here.



STRATEGIC COMMUNICATIONS STEP 2: AUDIENCE

Identify distinct audiences

Who are the most important people to reach?

Defining audiences may be one of the most difficult steps in launching a strategic communications effort. Often, organizations and leaders tend to state audiences in broad terms rather than identify distinct audiences with specific characteristics who may need different types of information and messaging in order to engage (e.g., using stakeholders rather than elementary and middle school principals and parents).

According to Be Clear, being specific and deliberate in identifying priority audiences is a key component of developing and executing an efficient strategic communications plan that differentiates among audiences. Doing so will clarify the desired actions, messages, and tactics in Steps 3 and 4 to follow.

Start by brainstorming all the potential audiences to impact through strategic communications. Be as specific as possible, giving careful consideration to the unique needs and concerns of each group. The list may even include "audiences of one," a single person whose actions and opinions are vital to advancing the work but who is not part of a larger audience group, for whom messaging should be tailored.

Below is a list of possible stakeholder groups to identify during this process.

Hypothetical SEA Brainstorm List

- Internal SEA Staff: Team Leads for Titles I, II, and III
- Internal SEA Staff: Team Leads for MTSS, PBIS, and Special Education
- State workgroup in charge of improving alignment and coherence of whole-person efforts
- Health and Human Services Director
- State Board of Education

- State Superintendent of Instruction
- Superintendent's Cabinet: Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity
- Directors of Regional Service Centers

Next, list the potential audiences in priority order. Who are the stakeholders to communicate effectively with in order to accomplish the goal?

Hypothetical SEA Refined List by Priority

- 1. Internal SEA Staff: Team Leads for Titles I, II, and III
- 2. Internal SEA Staff: Team Leads for MTSS, PBIS, and Special Education
- 3. Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity
- 4. State workgroup in charge of improving alignment and coherence of whole-person efforts
- 5. Health and Human Services Director
- **6.** State Superintendent of Instruction
- 7. Directors of Regional Service Centers
- 8. State Board of Education

Last, identify the "top three" (or four, at most) audiences to focus on with this strategic communications plan. In addition to priority, consider the following characteristics:

- Connection to Goal: Does achieving the goal require people or groups within the agency to act? Does it require people or groups outside of the agency to act? Or is there an ideal mix of internal and external stakeholders who need to buy in and then spread the message to others?
- **Receptiveness:** How hard or easy might it be to get this person or group to support or share the goal? How much effort is it worth to invest in this audience based on how they might help advance toward the goal or stand in the way of it?
- Accessibility: How likely is it that the message will reach this person or group? Are there already regular opportunities to interact with them? This may affect the amount of effort needed to establish communication with this audience.

Keep the initial list to revisit in future strategic communications planning as work advances or evolves. Hypothetical SEA "Top Three" List to Add to Template

- 1. Team Leads for Titles I, II, and III and for MTSS, PBIS, and Special Education
- 2. Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity
- 3. Regional Service Center Directors

Example: Hypothetical SEA Audiences in Template

Goal: Align various departments within the Agency with a common understanding and common language so that technical assistance can be consistent to Service Centers and districts.

Audiences

Team Leads for Titles I, II, and III and for MTSS, PBIS, and Special Education

Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity

Directors of Regional Service Centers

Your Turn: Brainstorm an initial list of possible audiences.

Your Turn: Rank the initial list of possible audiences by priority below (1, 2, 3, etc.)

Please transfer your top three (or four) Audiences into the Strategic Communications Plan Template here.



STRATEGIC COMMUNICATIONS STEP 3: DESIRED ACTION AND MESSAGES

Decide what actions audiences should take, and draft key messages accordingly What do the audiences need to do, know, or believe?

Effective messaging requires moving the audience toward action through clearly conveying a thought, idea, or argument.

Desired Action: Start by writing down one desired action for each target audience to take. These actions may be short or long term depending on the goal's timeline. For this step, it is okay to see variances in the expectations and timelines for each audience. Remember, the strategic communications plan may be modified or updated as audiences provide feedback and relationships deepen.

Messages: For each audience and desired action, draft three messages that will resonate with them and compel them to take action. As with the goal, use everyday language to convey a clear and convincing message, which will increase the likelihood that the audience will retain it and take the desired actions. For this step, it is important to consider the priorities and perspectives of each audience. Craft messages that dispel myths, address concerns, or highlight the positive outcomes if the goal is reached — or even to show what negative consequences will follow for students and communities if it is not. Consider how messages characterize those who will be the beneficiaries of this work; in other words, consider how to highlight the assets of students, families, and communities rather than only focusing on deficits.

Consider the following:

- What action(s) should each audience take after seeing or hearing the message?
- Does the audience require a mindset shift to achieve the strategic communications goals?
- How can messages be tailored to align with the priorities or concerns of this audience?

Also, consider opportunities to elevate the voices and perspectives of individuals and groups who historically have not been included in decision-making. For example, how could the message be shaped by diverse student perspectives? Building on that, how could students be directly involved in crafting and delivering these key messages?

Example: Hypothetical SEA Messages in Template

Goal: Align various departments within the Agency with a common understanding and common language so that technical assistance can be consistent to Service Centers and districts.

Audiences	Desired action and messages
Team Leads for Titles I, II, and III and for MTSS, PBIS, and Special Education	Desired action: Prioritize and champion an aligned, shared vision of SEL in their work with school systems
	Messages:
	 SEL is an important component of the strategic plan to achieve outcomes for kids.
	 Words matter — it is important that we use the same words internally and externally; this is critical for not confusing schools and districts.
	 Our job is to help ensure we are staying on the same page with a shared vision.
Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity	Desired action: Champion SEL by asking select departments to explain how they will incorporate SEL into their work, and check back to ensure implementation
	Messages:
	 SEL provides protective factors that students urgently need, particularly when they have experienced trauma and/or COVID-related learning disruption.
	 SEL will enable students to achieve more academically and in their careers; we cannot make up for lost learning time if we do not create the conditions for learning now.
	 Research demonstrates the effectiveness of SEL for students like ours.

Audiences	Desired action and messages
Directors of Regional Service Centers	Desired action: Support districts to implement SEL systematically; see Regional Service Centers as central to expanding SEL systematically across their regions
	Messages:
	 It has never been more important to attend to the well-being of students and staff (cite data points).
	 When adopted systematically, SEL promotes healthy minds and nurturing relationships.
	 Social and emotional development fosters equity, particularly when supported by staff and resources and integrated into existing teams, data, planning, and practices.
	 This is not something extra to do—it is a way to do everything better.

Your Turn: For each of your prioritized audiences, list one desired action and three messages that will move your audience toward action

Please transfer your Desired Action and Messages into the Strategic Communications Plan Template here.



STRATEGIC COMMUNICATIONS STEP 4: TACTICS

Identify the tactics used to reach the audiences with key messages

What is the best way to reach the intended audiences?

Communication tactics are the ways to share messages with the intended audience. These might include modes of written or verbal communication. These tactics may involve sharing messages directly or may require including messages in others' communications, such as the media or presentations by supportive partners.

For each audience, consider established direct communications and also where else they go for information and who they trust as reliable sources. Leveraging existing publications, convenings, and other resources to support the message may be an easy tactic to employ. For example, if a key administrator consults a particular group or organization for important decision-making, it may be helpful to understand if that organization has published resources that support the goals and messages included in the strategic communications plan. Those organizations may be willing to help by sharing additional information to support the overall goal and inform the audience of its importance or merit.

Similarly, working with "trusted validators" or "ambassadors" to deliver messages on behalf of the initiative may be an effective tactic. These are people or groups who have direct experience with the problem at hand and who are known and trusted by the audience.

Finally, as noted above, consider how to engage diverse voices in order to enhance the authenticity of the messages and to elevate the voices of those who traditionally have been silenced.

Examples of possible tactics include the following:

- media coverage: earned, placed, or paid
- social media: text posts or graphics

- storytelling: written, oral, video, audio, animated
- speeches and presentations
- webinars or live trainings
- website
- email, phone calls, texts, and other direct messaging
- provision of shared talking points to trusted validators or ambassadors

It may be helpful to list tactics in order of priority or practicality, especially if there are several available options. Remember that once the template is complete, someone will need to take action, so it is best to prepare for that now. Keep in mind that revisiting this strategic plan — including the portions that deal with audiences, messages, and tactics — is possible at any time as the work advances or evolves.

Example: Hypothetical SEA Completed Strategic Communications Plan Template

Goal: Align various departments within the Agency with a common understanding and common language so that technical assistance can be consistent to Service Centers and districts.

Audiences	Desired action and messages	Tactics
Team Leads for Titles I, II, and III and for MTSS, PBIS,	Desired action: Prioritize and champion an aligned, shared	Department FAQ, glossary, include on web page
and Special Education	vision of SEL in their work with school systems	Talking points
	Messages:	Emails (e.g., biweekly SEL message)
	SEL is an important component	Short videos
outcomes for kid	outcomes for kids.	Zoom meeting "lunch n'
	Words matter — it is important that we use the same words internally and externally; this	learns"
		Collaborative meetings w/ other departments
	is critical for not confusing schools and districts.	Quarterly meeting
	 Our job is to help ensure we are staying on the same page with a shared vision. 	

Audiences	Desired action and messages	Tactics
Deputy Superintendent for Teaching and Learning and Deputy Superintendent for Equity	 Desired action: Champion SEL by asking select departments to explain how they will incorporate SEL into their work, and check back to ensure implementation Messages: SEL provides protective factors that students urgently need, particularly when they have experienced trauma and/or COVID-related learning disruption. SEL will enable students to achieve more academically and in their careers; we cannot make up for lost learning time if we do not create the conditions for learning now. Research demonstrates the effectiveness of SEL for students like ours. 	Deputy Superintendent message to Directors: • Sit down with SEL leads • Will check back in three months • Need to coordinate on this work In-person or virtual conversations with Deputy Superintendents: • Share personal & student stories • Create video with students to show to superintendent Ask to sit down with each Deputy Superintendent's team
Directors of Regional Service Centers	 Desired action: Support districts to implement SEL systematically; see Regional Service Centers as central to expanding SEL systematically across their regions Messages: It has never been more important to attend to the well-being of students and staff (cite data points). When adopted systematically, SEL promotes healthy minds and nurturing relationships. Social and emotional development fosters equity, particularly when supported by staff and resources and integrated into existing teams, data, planning, and practices. This is not something extra to do — it is a way to do everything better. 	Presentation to Service Center Coordinating Council One-on-one meetings with each Director Engagement with teachers to communicate SEL importance and need for Service Center support Identification and support of select district superintendents ready to support universal SEL by aiding with their request from Service Center

Your Turn: For each of your prioritized audiences and their messages, list the best way (or tactic) to reach them
For each audience, please transfer your tactics into the Strategic Communications Plan Template <u>here</u> .

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Click on any header to bring you back to that step in the workbook

<u>Goal</u>

Audiences	Desired action and messages	Tactics



WHAT HAPPENS NEXT: IMPLEMENTING THE STRATEGIC COMMUNICATIONS PLAN

Now that the complete strategic communications plan is complete, it is time to start putting it into action. Be Clear recommends considering the following questions before implementation:

- What resources are needed? Immediate next steps may depend on what resources are immediately available. For example, if connections to local media have already been established, it may be easy to have key messages featured in an upcoming publication. If those connections do not yet exist but using media is included as a tactic for garnering support, some legwork to build relationships with the media may be required before securing coverage of the issue.
- What partners can support this work? Identify those who already share the goals and values behind the communications plan and who might help amplify the messages. They may be members of the community that the plan aims to serve, or they may be other types of authorities who can validate and strengthen the messages. These could also be groups or individuals who can help stay in touch with the key audiences and keep their attention.
- What challenges will arise? Challenges may include mindsets, coordination, resources, and more. Considering challenges up front may impact the overall plan and at a minimum will support preparation for how to address them.
- What would make this plan more exciting and engaging? As mentioned above, including diverse voices and focusing on assets and opportunities will likely help audiences become and stay engaged, which will increase the likelihood of achieving the communications goals.
- What existing events and opportunities might align well with the plan's audiences or messages? Is there an upcoming meeting that would provide an opportunity to deliver the messages? Are there funding opportunities approaching that require action or support from stakeholders? Writing out a general timeline of intended activities may help with staying focused and maintaining momentum.



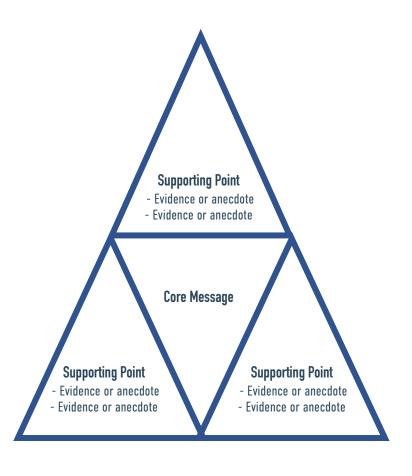
CONCLUSION

Done well, strategic communications about whole-person work will ensure that all of an SEA's stakeholders are able to describe the whole-person initiatives in an accurate and compelling way, that they can articulate their own roles in working toward the vision of serving the whole person, and that they are able to provide honest and transparent feedback to those in power about the whole-person work. This is a meaningful step toward ensuring that SEAs' whole-person programs and initiatives are more aligned and coherent and are therefore more likely to achieve their intended impact on student outcomes and advance equity in their state.



APPENDIX: COMMUNICATIONS TRIANGLE

In preparation for communicating with key audiences, it may be helpful to visualize key messages and their supporting points. Be Clear has developed a simple template that can help organize remarks as to specific audiences. Using this tool can help users focus on delivering a strong and strategic message.



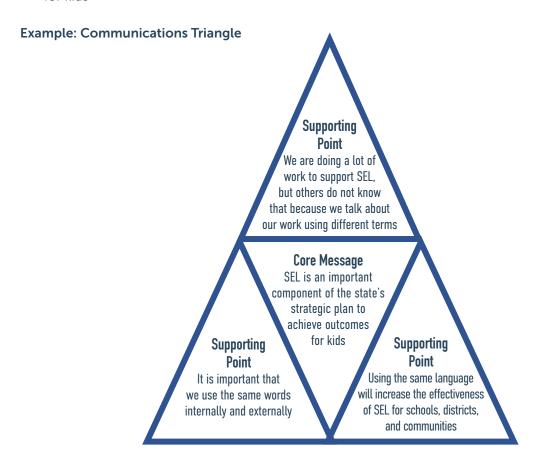
Start by creating a core message that speaks to the "big picture" of the importance of the overall communications goal. Write the core message in the center of the triangle.

Then, draft three supporting points along with one or two anecdotes or pieces of evidence that support each of these points. When engaging with any audience, plan to start with the core message, and then share each supporting point to strengthen it. Conclude by repeating or paraphrasing the core message to reinforce it. Consider context: What might be most compelling at this particular moment, or what are others likely to support based on their current priorities?

When tailoring this messaging triangle for different audiences, Be Clear suggests keeping the core message the same regardless of audience so that communications are consistent and messaging is coherent. Adapt the supporting points, emphasis, anecdotes, and data to effectively address the interests or concerns of each audience. For example, if the core message is about supporting students' college aspirations, then the stories and supporting points aimed at parents might focus on the promise of college for their children's futures, while the supporting points aimed at a superintendent might focus more on policies or practices that can support students' college enrollment.

Hypothetical SEA Example: Using the Communications Triangle

- Goal: Align various departments within the Agency with a common understanding and common language so that technical assistance can be consistent to Service Centers and districts
- Audience: Team Leads for Titles I, II, and III and for MTSS, PBIS, Special Education
- Core Message: SEL is an important component of the state's strategic plan to achieve outcomes for kids



Your Turn: Complete Your Communications Triangle

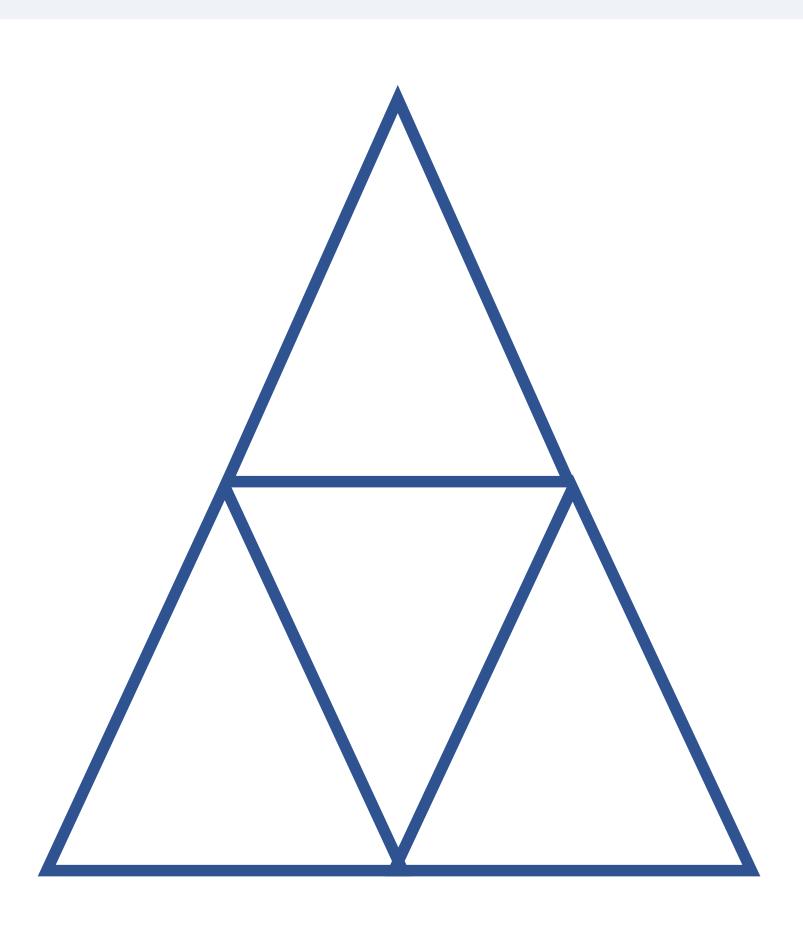
Fill in the the form fields below, or feel free to print out the triangle and fill in by hand

1. Identify the audience

Supporting Points

- 2. Write the core message in the center triangle
- 3. Add supporting points to the other pieces of the triangle, tailored for the audience based on what they need to know and what they already believe

4. Deliver the message
Audience
Core Message



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