

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: February 11, 2008

To: Principals, Division and Department Heads

Subject: BEST PRACTICES & GUIDELINES FOR USE OF CONNECT-ED
OUTBOUND COMMUNICATIONS SYSTEM

**Department and/or
Persons Concerned:** Principals, Vice Principals, Administrative Support Staff, Central
Office Divisions and Departments authorized to utilize Connect-ED

Reference: Best Practices & Guidelines for Use of Connect-ED 2007-2008

Action Requested: Review and implement immediately

Brief Explanation:

The attachment to this circular provides best practices and guidelines for the use of Connect-ED as an outbound communications tool for school sites and key central office divisions and departments.

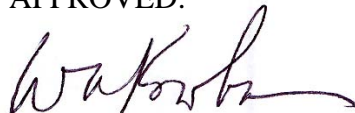
On November 13, 2007, the Board of Education approved the purchase of the Connect-ED service from The NTI Group, Inc. for use at all district-run schools, child development centers, and central offices through July 31, 2008. Authorized users of Connect-ED will be notified of contract extensions and an updated Best Practices & Guidelines will be issued on an annual basis, as appropriate.

Managed through the Communications Department, Connect-ED can also be used to send broadcast messages to all district employees and student contacts for both district-run and charter schools. Use of Connect-ED for a district-wide audience will be reserved for emergency response and other urgent communications that may also be linked to city, county and regional communications plans.

For additional information, please contact Jennie Breister, communications supervisor, at (619) 725-5598 or jbreister@sandi.net.

Ursula Kroemer
Director of Communications
Communications Department

APPROVED:



William A. Kowba
Interim Superintendent of Schools

UK:JAB

Attachment
Distribution: Lists A, C, D, E and F



**San Diego Unified
School District**

**Communications
Department**

June 2008

Connect-ED Outbound Communications Service

Best Practices and Guidelines



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OVERVIEW

Connect-ED is an Internet-based mass communications tool being implemented across San Diego Unified School District. Launched as a pilot project in May 2007, the system enables schools to personally communicate with parents/guardians to support emergency preparedness, involvement and student attendance. A principal can make one phone call that reaches all families and staff members within minutes. Connect-ED has also been used at a district-wide level, most notably as an emergency response and outreach medium during the October 2007 wildfires. The system has expanded to several central office departments, including Transportation, Human Resources, School Police and Food Services, for both employee and parent/guardian communication. Additional departments may be added.

Operated by Blackboard Connect Inc. (formerly The NTI Group, Inc.), Connect-ED provides technology, essential reports, tips for use, and customer support necessary for successful use of the system. Connect-ED is managed by the SDUSD Communications Department. A *Best Practices and Guidelines* publication will be updated on at least an annual basis.

ACCESS TO CONNECT-ED

In this document, the term “user(s)” refers to individuals with authorization to send Connect-ED outbound messages. The term “contact(s)” refers to message recipients.

Following an initial training session, Connect-ED users will be e-mailed a username, password and link to access the system. Users should review their information for accuracy, change their password and enter a five-digit dial in PIN that provides access to the system from any telephone via a Dial-In Messaging Card (to be used when Internet is unavailable).

The Connect-ED client care team recommends at least three users per school site or department. For schools, this would typically include a principal, vice principal and attendance clerk. In some instances, it may also be necessary to grant access to the school secretary, school clerk, or site technician. For district departments, recommended users include department or division heads, supervisors, administrative assistant, or other lead administrative support staff member. It is required that all principals and vice principals be trained on Connect-ED for emergency response preparedness. Principals and department heads are responsible for monitoring the overall usage of Connect-ED at their sites. Principals may also designate a staff person or assigned translator to record multiple language messages on his/her behalf.

Only the Superintendent of Schools, Deputy Superintendent, Chief of Police, Director of Communications and Communications Supervisors (with approval from the Superintendent) have authority to send district-wide messages to district employees and student contacts.

SYSTEM MAINTENANCE

Contact the Communications Department for any questions regarding access to Connect-ED.

The following district staff member is authorized to issue Connect-ED user names and passwords, and add, revise or delete user information from the system:

Jennie Breister
Communications Supervisor
Tel: (619) 725-5598
jbreister@sandi.net

For security reasons, it is imperative that the above individual be alerted when an employee with access to Connect-ED leaves the district, school or department, so that access can be terminated. Users should take every precaution to guard their user names and passwords, making sure this information is secure and not visible at computer stations or in shared offices. Users should log off Connect-ED when not in use. Student and employee information must be protected in line with standard district policies.

Contact information for students will be automatically uploaded from Zangle on a nightly basis. School sites should update student information on a regular, at least quarterly, basis to decrease the number of incorrect phone numbers and e-mail addresses transferred from Zangle. Refer to Job Aid: *Viewing & Editing a Contact's Primary Language & Telephone Number* found at <http://www.sandi.net/zangle/readandlearn/jobaids/index.asp> for assistance with maintaining two key elements of every student record in Zangle: Primary contact language preference and contact information for primary contact and/or additional parent/guardian.

Employee contact information will be automatically uploaded from PeopleSoft on a nightly basis. To receive messages as a district employee, contact information must be accurate in Peoplesoft, specifically phone numbers. Those with sandi.net e-mail addresses are also automatically uploaded into Connect-ED. Review Job Aid: *How to Edit and Add Phone Numbers* found at <http://www.sandi.net/peoplesoft/readandlearn/jobaids/index.asp> for assistance with updating phone numbers in PeopleSoft.

Connect-ED provides information after each call, including a list of incorrect telephone numbers, and the students or employees for which those numbers are listed. This "bad phone number" list can be easily downloaded into Excel for follow up. It is imperative that schools and district departments take an active role to maintain accurate contact information. A point person should be designated to follow up on "bad numbers" after each call. Parents, students and employees will miss important messages throughout the year if records are not corrected in both Zangle and PeopleSoft.

MESSAGE TYPES

Connect-ED offers four types of messages:

- Community Outreach** Outreach messages to parents and staff to communicate important news and developments related to a school or the district. Outreach messages can also provide information about upcoming events, meetings, etc. Messages are delivered to one phone number (typically the home number) of each selected contact, with the option to deliver messages via e-mail and/or to an additional phone (on a per student basis).
- Emergency** Emergency messages include, but are not limited to incidents and events that impact the health and safety of students and/or employees, including weather-related emergencies and natural disasters. Unlike the other three types of messages, emergency messages are sent by Connect-ED to up to six different telephone numbers and/or e-mails per contact. The system dials all telephone numbers listed for each contact. The district will send emergency messages that pertain to the entire district or a significant percentage of schools and will send an advance message to area superintendents and principals, alerting them to the message, recipients and further instructions.
- In the case of an emergency at an individual school, the principal should consult with his/her area superintendent to determine the appropriateness of sending an emergency message. Principals should work closely with school police and their area superintendent to determine whether it is more appropriate to send a call as an “Emergency” or send a follow up call as a “Community Outreach” message. Often times, emergency situations, such as lock-downs, are over quickly, and principals must proceed with caution when sending Connect-ED messages to avoid confusion and frustration for parents and guardians. As a general rule of thumb, provide clear and reassuring information for parents and guardians in any stressful situation.
- Attendance** Attendance messages alert parents and guardians to student absences on the day of the absence. Information on automated attendance calls from the district is detailed on page 7 under *Additional Information for School Sites*.
- Interactive Survey** Interactive Survey messages allow recipients, using a telephone keypad, to RSVP for school events or to provide input on school issues, for example a survey on mandatory school uniforms. Printable reports allow for coordination of responses as these are not “blind” surveys.

GENERAL BEST PRACTICES

Message Frequency

Connect-ED is provided on a per-student basis, as opposed to a per-call basis. Although the district can send an unlimited number of calls, the following established guidelines apply:

Attendance and emergency calls should be made by schools and the district on an as-needed basis.

Reminder calls for select groups of student contacts (for example a weekly Thursday night call to students involved in Saturday school) should also be made on an as-needed basis. Parents appreciate timely notices, no matter how frequent, and are more inclined to welcome them if their student is involved with multiple activities or events.

Community outreach and interactive survey messages to an entire school community should be limited to two calls per month, unless parents are already accustomed to receiving weekly messages from the principal. Regular update calls should include a brief summary of upcoming events and reminders, with more comprehensive information sent via e-mail and/or linked to a school's website.

No more than six district-wide community outreach or interactive survey calls should be made in a school year.

Message Length

Messages should be no longer than 60 seconds. Beyond 60 seconds, a recipient is likely to lose interest and hang up, or an answering machine or voice mail system may cease recording after that length of time. Best practice suggests that messages of 30 to 45 seconds are optimal, which allows ample time to record important points without losing the recipient's attention.

Message Delivery

As a rule, avoid scheduling messages to be delivered between the hours of 9 p.m. and 6 a.m. (unless the message to be delivered is time-sensitive or is related to an emergency). **Remember to select Pacific Time when scheduling message delivery on the Connect-ED website.**

Message Recording Options

The ***In My Voice*** option is recommended for all Community Outreach, Emergency and Interactive Survey messages. Messages recorded *In My Voice* will be more positively received by the members of a school community and will enhance parent communication. Best practice suggests that each school establish a single voice for its calls so that messages are easily recognizable. The principal is the preferred voice for a school. The *In My Voice* option is especially effective for delivering emergency messages. It

personalizes the call and lends a familiar, reassuring tone to an emergency situation. In addition, users can listen to their recorded message prior to its delivery to check for accuracy.

The **Text-to-Speech** option delivers a simple message with specific recipient information read by a computerized voice. This option is typically appropriate for attendance calls, over-due library books, or fee reminders, and can be delivered in both English and Spanish. The advantage of *Text-To-Speech* is that Connect-ED can automatically insert the first name of a student for whom the call is being made, the date, school name, as well as period missed, or specific information that can be downloaded from an Excel spreadsheet. When using *Text-to-Speech*, always proofread messages carefully as the computer will read the text exactly as it is typed.

The **Blend It!** option combines the familiarity of a voice greeting with specific information for each recipient to make a message both personal and relevant. SDUSD highly recommends the use of *Blend It!* for messages typically sent with the *Text-to-Speech* option. Principals can pre-record an introductory message that can be re-used by their staff for attendance calls, overdue library books, fee reminders, etc. This allows principals to stress the importance of attendance, or to personally ask parents to track a particular issue.

Message Content

District and school employees who record messages are acting as representatives of SDUSD, a public institution. Discretion should be exercised with every recording, including references to protected classes and specific cultures. Public institutions are required by the Constitution to maintain a position of neutrality towards religion. No faith-based references should be included in messages.

Tips for Recording a Message

Prepare – Know what you want to say. Make notes, bullet points, or use a script. Practice before recording a message.

Repeat important information – Repeat important information (e.g. time, date and location of meeting) at both the beginning and end of a message.

Grab Their Attention – Introduce yourself and let the recipient know immediately that the message contains important information from the school.

Be Yourself – Relay the message as if you were speaking to someone face-to-face. Think about tone, inflection, emphasis. Most importantly, be natural.

Message Language Preference

Connect-ED provides delivery options for seven recognized district languages: English, Spanish, Cambodian, Lao, Somali, Tagalog and Vietnamese. For Connect-ED student contacts, language preferences are based on Zangle information taken from the *Contacts* tab, not the student's home language field. Zangle users should log onto *Enrollment/Student Editor/Contacts* to make sure the language field is correct for the student's primary contact, as well as any other contacts that are flagged as type "*Parent/Guardian.*"

In-My-Voice messages should be recorded and sent in the language preference of each recipient when possible. Without translation assistance in every language recognized by your school community, every attempt should be made to record and send messages in English and Spanish, sending the English version to all families not designated as Spanish.

Translating a Message

School sites are asked to develop their own roster of translators, either staff or parents, for both emergency and general school-to-home communications. Translators need not have access to Connect-ED, and can be given instructions for recording phone messages that can then be sent out by an authorized Connect-ED user.

The district Translation Services division is also available to assist, however given the volume of district-wide translation requests, resources may be limited for Connect-ED assistance without lead time. Best practice suggests that schools and departments allow one-week notice for district translation assistance. District translators have Connect-ED access and can translate and record messages, notifying schools or departments when messages are ready to be sent. Schools should provide district translators with a draft of the message for translation.

San Diego Unified School District Translation Services:
(one week notice required for Connect-ED assistance)
Ana Morales, Supervisor
Tel: (858) 496-8366 or amorales@sandi.net

Blackboard Connect Inc. also offers limited translation services, free of charge, in a variety of languages. Call the help line at (866) 435-7684) or support@blackboardconnected.com for more information.

Post-Message Data

Connect-ED e-mails detailed information about the receipt of every call to the person originating a message. All users with access to the same contacts can retrieve results of a call by accessing the *Message Summary* from the *Log* tab on the Connect-ED website. Principals and department heads should routinely examine this data

(hang ups, length a listener stayed on the call, etc.), and measure indicators (such as attendance at events about which parents are notified) to determine the effectiveness of their Connect-ED messages.

ADDITIONAL INFORMATION FOR SCHOOL SITES

Attendance Calls

SDUSD anticipates providing school sites with attendance call support by sending automated attendance calls each day, specific to each school site's schedule. A designated morning call time will be established for each school, in accordance with Zangle reporting procedures. Attendance clerks will continue to clear absences throughout the day and a possible second call will go out in the early evening for all uncleared absences. More information will be provided and a pilot group of schools will test the system prior to the district implementing automated attendance calls.

In the interim, schools are encouraged to take advantage of the current manual attendance call feature offered by Connect-ED. The district recommends using the *Blend-It!* recording option to have principals pre-record an introductory message to a standard automated attendance message. Attendance clerks can easily download a list of students from Zangle into Connect-ED and avoid the need to make individual calls to families. Contact the Blackboard Connect Inc. HELP desk for assistance at (866) 435-7684 or support@blackboardconnected.com.

Teacher Support

A separate Connect-ED service, designed specifically for classroom-level communication, is currently under development. This teacher module will allow teachers to send pre-recorded messages directly to the parents/guardians of their students with important information, such as upcoming tests, homework assignments and citizenship reports. Messages will be available in all seven languages served by our district. More information will be provided as this function becomes available.

ADDITIONAL INFORMATION AT DISTRICT LEVEL

Departments and divisions with access to Connect-ED should assign a point person, at the supervisor level or above, to be the department or division "voice" and to monitor usage on a regular basis. Care should be given to operate with the *General Best Practices* provided.

Central office departments, such as Payroll, Transportation and Food Services will have specific function requests utilizing Connect-ED. The departments will work closely with the Connect-ED Client Care team and Communications Department to map out guidelines and monitor successful implementation of this service.

Area and high school superintendents, their administrative assistants and parent services liaisons will be granted access to Connect-ED activity by all schools and child development centers in their areas. Superintendents can send messages on behalf of schools/principals, and send broadcast messages or surveys to principals, employees, or parents/guardians in their areas. Area superintendents should monitor usage by their schools to make sure all best practices are maintained.

DISTRICT-WIDE MESSAGES

Only the Superintendent of Schools, Deputy Superintendent, Chief of Police, Director of Communications and Communications Supervisors (with approval from the Superintendent) have authority to send district-wide messages to all district employees and student contacts. Others may be authorized at the Superintendent's direction.

Area Superintendents and principals will be alerted in advance, via a separate Connect-ED message, of emergency or other urgent district-wide communication.

The Superintendent of Schools, in consultation with the Director of Communications and other senior staff, will determine the need to initiate district-wide messages. In the case of emergency calls, messages may include, but are not limited to, school closings or delays due to natural disasters, inclement weather, or other occurrences that may impact the health and safety of students and district employees.

The Superintendent may also deliver messages to provide parents/guardians with information about district-wide events, special meetings or announcements.

For all other district-wide messages, a request must be submitted in writing to the Communications Department for review and approval 7-10 days prior to the requested date of delivery. The written request should include date and time of message delivery, the target audience, the general nature of the message, and a contact name and telephone number.

The Communications Department reserves the right to reject a message for district-wide delivery. Written requests should be sent to:

Jennie Breister
Communications Supervisor
jbreister@sandi.net
Tel: (619) 725-5598
Fax: (619) 725-5576
Ed Center Room 2145

FREQUENTLY ASKED QUESTIONS

- Q.1. How does Connect-ED obtain information on district students and employees?
A.1. *Connect-ED information is transferred directly from Zangle and PeopleSoft and therefore is only as accurate as the information maintained by schools and district staff. Users have different levels of accessibility based on their job function.*

FREQUENTLY ASKED QUESTIONS (continued)

- Q.2. Which student phone number is called for a typical outreach or attendance call? Which phone numbers are called for emergencies?
- A.2. *In Zangle, the first phone number listed for a student's primary contact is the number called for standard Connect-ED outreach, attendance or survey calls. A different number, such as a parent cell phone, can be flagged for attendance calls. Contact NTI for assistance. For emergency calls, there can be up to seven different numbers and two e-mails contacts per student if entered properly into Zangle. These include the student home number, plus work, mobile and e-mail address for the primary contact and an alternate contact if flagged as parent/guardian.*
- Q.3. I am the principal at ABC High School. Can I send messages to the homes of students attending the middle schools in my feeder pattern?
- A.3. *Initially, principals are only given access to contact information for their own students. However, with expressed approval from the principals at the middle schools, a list of those students can be exported from Zangle to Excel, and then to Connect-ED as a special contact group until those students are officially enrolled. Contact NTI for assistance with this process.*
- Q.4. I am an elementary school principal with standardized tests just a few weeks away. I want to send a message just to the fourth-grade parents reminding them about these important tests. Is this possible?
- A.4. *Yes. Connect-ED allows you to sort message recipients by grade, or you can create custom groups within your school for club affiliations, committees, etc.*
- Q.5. Is there a limit to the number of groups I can create? How do we update them?
- A.5. *You can create an unlimited number of groups. Contact information for individuals selected in a group will be automatically updated nightly from Zangle or PeopleSoft. However you must manually remove an individual from your group in Connect-ED if they are no longer affiliated with it, but are still an active student or employee of the district.*
- Q.6. We can also create groups in Zangle. Can these groups be transferred to Connect-ED?
- A.6. *No, groups from Zangle do not get uploaded into Connect-ED. Schools across the district do not use this Zangle feature in a consistent manner, therefore it's not something that can be feasibly managed in Connect-ED. If you would like to manually create one of your Zangle groups in Connect-ED, contact Blackboard Connect Inc. for time saving tips.*
- Q.7. Does Connect-ED provide data regarding the status of calls delivered?
- A.7. *Yes, for example a principal will receive an e-mail once a call has made several attempts to reach recipients. The principal can view the success rate of the call (or e-mail when applicable), instruct the system to retry specific numbers, and print out a "bad" number list for follow up. On a monthly basis, users can monitor total success rate of all calls, average length of time recipients listen to a message, and other important data to gauge effectiveness.*

KEY CONTACTS, TRAINING OPPORTUNITIES & TECHNICAL SUPPORT

Connect-ED Technical Assistance

Blackboard Connect Inc. 24-Hour Hotline:

(866) 435-7684

support@blackboardconnected.com

Zach Weisman

Manager, Client Care

Blackboard Connect Inc.

Tel: (877) 684-4411 ext 1448

Zach.Weisman@blackboardconnect.com

Connect-ED Training Opportunities:

Contact the Blackboard Connect Inc. Client Care Hotline to set up a personal training session or to participate in an on-line training session, available on a weekly basis.

District Connect-ED liaison:

Jennie Breister

Information Services Specialist

Tel: (619) 725-5598

jbreister@sandi.net

District Translation Services Division

(one week notice required for Connect-ED assistance)

Ana Morales, Supervisor

Tel: (858) 496-8366

amorales@sandi.net

IT Support – Zangle

Schools should contact their Zangle power user, or site tech at secondary schools. Zangle power users can access additional support by contacting their on-site support representative for general questions, or the I.T. Help Desk for repair issues.

IT Support – PeopleSoft

Employees should refer to PeopleSoft Job aids, or contact the I.T. Help Desk at (619) 725-7500 for technical support. Employees should contact the Communications Department for issues regarding access to Connect-ED.