



WHITE PAPER

## **Redefining the Word “Patron”**

### **Who exactly is a “patron?”**

Is it the traditional definition of a tax-paying citizen who helps to fund the greater good, in all its forms?

Or, could that definition be too narrow in its scope, in an age where those who would previously be considered outliers now have a measurable impact on the success or failure of public and private entities?

Research suggests while it has long been the former, today’s “instant feedback” world demands that it be the latter.

With the ability to build or ruin reputations (or scuttle election plans) in an anonymous blog post, an off-handed tweet, a note made in passing on a Facebook page, or some other form of hit and run communication, educators and public officials seeking their share of the taxpayer dollar ignore the thoughts, ideas and concerns those outside of the traditional patron definition at their peril.

### **Strategic planning: Why the definition of “patron” needs to be expanded**

Over the last several years, the growing influence of those who can’t always be found on the local tax rolls has become more and more evident.

Part of this influence can be tied to a matter of trust. After all, if you can’t trust your child’s teacher to give you his or her honest opinion about an upcoming school district ballot issue, for example, who can you trust?

Part of it is a matter of authority, meaning those seeking information and insight will turn to those who they believe are “connected” at some level – teachers, Board of Education members and so on. Much as school districts and public entities would like to believe that typical patrons research issues which are being wrestled with, the truth is a quick, even incomplete, response is usually all that is wanted.

And, quite simply, part of it is a matter of convenience. As our world seeks to balance the yin and yang of the time available to secure information with the volume of information that exists, the faster, easier answer is more and more routinely preferred.

We can confirm this in our research, by simply looking at the information sources that are preferred by typical school district patrons. Sources that require time and significant effort (such as the local newspaper) are eschewed for back fence conversations with neighbors, classroom visits with teachers, chats with the principal, and visits to a district's website.

In fact, school district websites have, on average, doubled as a preferred information source in just the last five years alone. Twitter and Facebook now stand at the level where websites were five years ago; we expect to see them reach and even eclipse that standing even more quickly.

(And remember, it's not necessarily your organization's Facebook page and Twitter feed that is the source of a citizen's news.)

What does this mean to a school district or public entities?

Our research suggests effective strategic planning cannot take place without a keen understanding of the thoughts, ideas and concerns of not only those who pay the taxes, but also those they turn to for advice and counsel – either officially or unofficially.

## **Defining the patron audiences**

The research seems to suggest there are five different types of people who should, in fact, be labeled as “patrons,” and the differences are based on how connected they are with the services being provided. Specifically:

### Users

Whereas patrons used to be considered all taxpayers, it is becoming clear there are three distinct groups whose only shared characteristic is that they are levied by the school district on their tax bills. The first of these groups are what we call “Users.”

A User is an individual with a family member (generally a child or children, but it can be a grandchild or grandchildren, depending on the living arrangements) who attends a school in your district right now. These individuals are the ones who have direct, personal knowledge of what is taking place in at least one school. They will also have some level of awareness of activities within the district itself – although our research generally suggests that they only pay sharp attention to these details when there are concerns.

These are the patrons that school districts, very naturally, have worked hard on in relationship-building. These are a school district's best “salespeople,” or its worst nightmare, depending on their experiences.

As a result, most school districts have a host of ways of taking the temperature of Users, and generally do a good job of keeping in touch with how they are feeling. Sometimes, there is (what we have found to be) the mostly mistaken notion that “if parents (Users) are on board, then we'll

drag along enough people” on a particular issue. But, it is certainly impossible to move in any direction if the sentiments of Users do not align with those of the school district.

### Legacies

A Legacy is an individual who had a connection at one time – either personally, or through a child or grandchild – but who currently has no direct, daily connection with a district school.

Typically, the reasons for the separation are either a decision to shift to a different school setting (private, parochial, home school, online, etc.) or simply that everyone in the household has graduated and moved on.

These individuals are standing on a bridge between being a User and joining the next group – Taxpayers. Generally, our research suggests they have a soft spot for the school district (usually a particular set of schools where they or their offspring had experiences), but their interest level has understandably dwindled.

Understanding how to keep Legacy patrons engaged is a critical component of the strategic planning process, because – statistically speaking – adding their support to that of Users can be the path to success that will make certain most community members align with and support a school district’s plan.

### Taxpayers

Those without a recent (within five years) personal connection to a school district, or those who have never had a child in a district school, are Taxpayers.

For them, the school district is – for the most part – merely a line on their tax bills that has no more significance than the lines for police protection or the sewer district. This is not to say that they don’t value quality schools; they simply have no basis (or need) to elevate the school district above any other item on their tax bills.

For Taxpayers, the issue is all about demonstrating value for their money. That’s where the focus should be when it comes to strategic planning efforts to connect with this group.

In up and coming communities when the homes turn over (in normal economic times), the school district can be a conduit to a higher home sale price when it is time to move. For established community, schools are an investment that was made years ago and Taxpayers in these situations tend to appreciate a district that spends money maintaining what they (the citizens) have already invested in.

### Influencers

Perhaps the biggest hole in most school district’s strategic planning processes can be found in Influencers.

Simply put, an Influencer is someone to whom a patron turns to find out more, because this individual (it is believed) has inside information which is not available to everyone. Oftentimes,

that “inside information” is little more than gossip, rumor or innuendo, but that does not stop patrons from asking, or Influencers from sharing what they know.

The Influencer group includes:

- Teachers
- Principals
- Other staff members – including, but not limited to, those in food service, transportation, maintenance, and safety
- School Board members
- District staff members
- Civic and business leaders in the community

Typically, the Influencer’s counsel is sought unofficially, in a “What have you heard about X?”-type conversation. It is at this point the strategic planning concern is two-fold.

First, is the information being shared accurate?

Second, what is the temperament of the individual who is providing the information?

School districts can do all they can to provide their Influencers with accurate information. But, if the mood is uneven within the Influencer community, the result is negative.

Our research with staff members – taken at the same time as research with patrons – provides insight into where the opinions of Influencers line up with those of patrons, and where they differ. This, we have found, is mission-critical, because if staff members are downgrading the district’s strategic plan, ballot proposal, or any other key step, the impact on the rest of the patron community can be devastating.

### Observers

Observers include any individual who provides commentary on the activities and news taking place in the school district through either formal or informal methods. Observers typically don’t have a direct connection to the school district, but it isn’t required that they be a complete outsider to fit the description. They just need to have an opinion that they share with enthusiasm.

- Places where Observers pop up include:
- Facebook posts
- Tweets on Twitter and other such “quick update” spots
- News stories
- Blogs
- Letters to the Editor, and in spots where you can phone the newspaper and your comment gets published without any attribution
- Comments after news stories posted on media websites

The more confident (and typically more organized) Observers lean toward more formal methods in which their name is attached to their comments. These are the ones who typically, we have found, find an issue and continue that theme in most every exposure.

The more random and less thoughtfully crafted comments come from Observers who prefer the shadow created by an internet screen name. There, they can spread ideas, information and, often, misinformation without any concern about being called to task for their inaccuracies.

Our research suggests a school district should not set a goal of winning the hearts and minds of all Observers. Rather, it is better to simply provide mission-based messaging in media that is likely to find its way to the Observer community, track the trends in terms of their commentary, and respond as necessary.

### **Final Insight: Effective strategic planning requires connecting with all your patrons**

In considering your school district's strategic plan, it's important to broaden the scope of the term "patron."

A patron is someone who – through their advocacy, their dissent, or even their apathy – impacts the success of a school district.

Not considering all the various patron audiences as you set your plan in place is a bit like a making a recipe that's missing an ingredient. You'll know something isn't quite right; you just won't be certain what the problem is or how to fix it.

Are there varying degrees of importance among the patron audiences described above?  
Absolutely, according to the research.

Yet, it's not enough to create a plan that aims only at the largest groups (Users and Legacies, typically) and assume that their advocacy will bring the other patron audiences along. Successful school districts understand what is most important to each type of patron, and create and execute strategic plans that build and nurture relationships, according to those specific needs.