



Performance Budgeting

Communications Plan

Version 1.0
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Prepared for:
Commonwealth of Virginia
VA – 090724-PPC

Prepared by:



Record of Changes/Version History

Change/Version Number	Date of Change	Impacted Section/Description of Change	Person Entering Change
0.5 – Draft	09/28/2009	Submitted Draft	Faye Anson
0.9 – Final	10/06/2009	Submitted Final	Lee Hodges
1.0 – Final	10/09/2009	Approved Final	Lee Hodges

Communications Plan

Effective and open communication is critical to the success of any endeavor. Throughout the course of the Performance Budgeting (PB) project, full and clear communication is necessary to ensure that all stakeholders understand any topic that could impact the project’s success. These issues may involve positive and negative changes, problems, delays, questions, requests, and general status. The development of a communications plan helps set stakeholder expectations and reduces or eliminates problems associated with the distribution of information. In an effort to overcome any misunderstandings, a structured communications plan is necessary and is the premise for this document.

The Communications Plan will address how, when, and what information is received and communicated to PB stakeholders. The goals are to:

- Identify all stakeholders and the type and frequency of the information they require.
- Establish and maintain project credibility by communicating current status to all stakeholders.
- Generate a common understanding of how project activities will improve stakeholders’ ability to achieve their goals.
- Garner long-term and broad-based support for developing and maintaining relationships that are consistent, reliable, and complete.

The Communications Lead from Project Performance Corporation (PPC) will be responsible for execution and monitoring of this plan. This includes ensuring the required communication activities occur and information is disseminated as planned, keeping the list of stakeholders and their information needs up to date, and maintaining the information disseminated to stakeholders in accordance with the PB Configuration Management Plan.

A. General Information

<i>Project Title:</i>	<u>Performance Budgeting</u>	<i>Project Working Title:</i>	<u>Performance Budgeting</u>
<i>Proponent Secretary:</i>	<u>Ric Brown, Secretary of Finance</u>	<i>Proponent Agency:</i>	<u>Department of Planning & Budget</u>
<i>Prepared by:</i>	<u>Lee Hodges</u>	<i>Date / Control Number:</i>	<u>10/09/2009</u>

B. Distribution Groups

The PB project requires many groups be included in the communications process and each has their own needs. The chart below outlines the groups and their needs.

<i>Stakeholder</i>	<i>Actions Required</i>	<i>Information Need</i>
Governor (and staff)	Keep informed and engaged	Project Update
Secretary of Finance	Keep informed	Project Summary
IT Investment Board	Full project briefings	Project Summary
Commonwealth Chief Information Officer (CIO)	Keep informed and engaged	Project Summary
Agency Information Technology Resources (AITRs)	Keep informed	Project Summary
Secretary of Technology	Keep informed	Project Summary
Secretariat Oversight Committee	Keep informed	Detailed Status, Change Requests
Steering Committee	Keep informed and engaged	Detailed Status, Change Requests, Action Items, Project Meeting Summary, Project Risk and Issues
Money committees staff	Keep informed	General Information
Chief Budget Officers	Allow input into design, prototype reviews, testing and training	General Information
Auditor of Public Accounts	Keep informed	Same as Steering Committee, Project Management Team
Council on Virginia's Future (COVF)	Keep informed	Same as Steering Committee
VITA PMD - Virginia Information Technology Agency – Project Management Division	Keep informed	Detailed Status
Agency Heads	Keep informed	General Information
Media/External Organizations	Keep informed	General Information
HR directors, consultants, professional staff	Keep informed	General Information
Joint Legislative Audit & Review Commission (JLARC)	Keep informed	General Information
End users	Keep informed, engaged and trained	General Information, Training

<i>Stakeholder</i>	<i>Actions Required</i>	<i>Information Need</i>
Department of Accounts (DOA)	Keep informed and engaged	General Information
Division of Legislative Automated Systems (DLAS)	Keep informed and engaged	General Information
COVA Financial Management Project (FM)	Keep informed and engaged	General Information
General Public	Keep informed	General Information
Project Management Team	Keep informed and engaged	Summary Status Update, Project Meeting Summary, Action Items, Change Requests, Detailed Status, Project Risk and Issues
Change Control Board	Keep informed	Summary Status Update, Change Requests
Project Team	Keep informed and engaged	Detailed Status, Project Meeting Summary
Workgroups	Keep informed and engaged	Detailed Status, Project Meeting Summary

C. Information Description, Collection, and Reporting

<i>Information Need</i>	<i>Description of Information</i>	<i>When Collected</i>	<i>How Collected</i>	<i>How Reported</i>
Action Item	Project Action Items	Ongoing	Log Entry Form	Action Item Log
Change Requests	Project Change Requests	Ongoing	Log Entry Form	Change Request Log
Detailed Status	Status of project including budget, scope, and schedule targets	Ongoing	WBS, Project Status Meetings, Email	Project Management Presentation
Detailed Status	Status of project specifically for VITA PMD	Ongoing	Project Status Meetings, Project Status Reports, Email	ProSight
Detailed Status	Status of project including budget scope and schedule targets	Ongoing	WBS, Project Status Meetings, Email	Steering Committee Presentation
Detailed Status	Status of tasks, deliverables, upcoming events	Ongoing	WBS, Meetings, Email	Meeting Minutes
General Information	General project status	Ongoing	Project Meetings, Emails	Communiqué
General Information	General project information	Ongoing	Project Meetings, Emails	Email Broadcast
General Information	General project documentation, milestone dates	Ongoing	Project schedule, Project deliverables	Public Web Site
Project Meeting Summary	Details of meetings	Ongoing	Notes during meetings	Meeting Minutes
Project Summary	Summary of project status	Ongoing	Status Reports	Summary Status
Project Update	High Level status of project	Ongoing	Status Reports	Project Update
Risks and Issues	Project Risk and Issues	Ongoing	Log Entry Form	Risk and Issue Log
Training	Training and education on various aspects of the system	Ongoing	Design Sessions, Meetings, Emails	Training Sessions

D. Communications Management Plan Summary

<i>Report or Document</i>	<i>Delivered By</i>	<i>Distribution Group(s)</i>	<i>Transmittal Method(s)</i>	<i>Frequency</i>	<i>Storage</i>
Action Item Log	COVA and PPC PM	Steering Committee, Project Management Team, APA	Email, Meeting	Monthly	PB Project Repository
Change Request Log	COVA and PPC PM	Secretariat Oversight Committee, Steering Committee, Project Management Team, APA	Email, Meeting	Monthly	PB Project Repository
Communiqué	COVA PM	Agency Heads	Email	As Needed	
Email Broadcast	COVA PM	End Users	Email	As Needed	PB Project Repository
Meeting Minutes	PPC PM	Project Team, Workgroups, Steering Committee, Project Management Team, APA	Email	As Needed	PB Project Repository
Project Management Presentation	PPC PM	Project Management Team, APA	Email, Meeting	Bi-Weekly	PB Project Repository
Project Status Report	PPC PM	COVA PM	Email	Bi-Weekly	PB Project Repository
Project Update	Secretary of Finance, Budget Director	Governor (and staff)	Email, Oral	As Needed	
Public Web Site	COVA and PPC PM	General Public	Web - Public	As Needed	Web
ProSight	COVA PM	VITA PMD	ProSight	Monthly	ProSight
Risk and Issue Log	COVA and PPC PM	Steering Committee, Project Management Team, APA	Email, Meeting	Monthly	PB Project Repository
Steering Committee Presentation	COVA and PPC PM	Steering Committee, APA	Email, Meeting	Monthly	PB Project Repository
Summary Status	Dan Timberlake, Peggy Feldmann	Secretary of Finance, IT Investment Board, Commonwealth CIO, Agency Information Technology Resources (AITRs), Secretary of Technology	Email, Oral	As Needed	
Training Sessions	PB Trainers	End Users	Meeting	Before Go-live and As needed	PB Project Repository

E. Transmittal Method Types

Email

Information sent to project members or users via the state's electronic mail system.

Meeting

A formal gathering of project members and/or end users to discuss an aspect of the project. Agenda is provided and meeting minutes are taken (for more details, see "Meetings" sub-section in "Communication Protocols" section below).

Website - Public

A website that will be accessible by both end users and the general public to get information about the project. The following information will be made available through the public web site:

- Project overview and scope
- Approved project management plans
- Email broadcasts and project presentations
- High-level schedule and calendar of upcoming events
- Project organization chart
- Contact information for the COVA Project Manager and COVA Functional Manager

Oral

Informal conversations and telephone calls that convey information about the project.

ProSight

Tool used by the Commonwealth of Virginia to report status of project to various management levels.

F. Communication Protocols

Communication is simply a method of sending a message from one person or group of persons to another, and is of vital importance to the success of the PB project. Good communication will ensure that all stakeholders commit to achieving the project goals and will mobilize staff to support this initiative.

Communication Protocol provides an overview of the standards to be followed and describes the "rules of engagement."

Meetings

The following protocols should be observed for meetings:

- Provide an agenda with a stated purpose and/or outcome(s). If relevant, provide participants with advance background materials, so they may prepare for the meeting.
- Specify length of meetings. Try to keep meetings to under an hour.
- Be on time.
- Specify location of meeting.
- Turn off all electronic devices.
- Keep meeting minutes. Minutes should reflect any issues, decisions, and action items that were discussed during the meeting. They should be sent to the participants and relevant stakeholders within three days after the date of the meeting.

Status Reports

The following protocols should be observed when producing status reports:

- Verify with the audience that the status report contains all of the required elements.
- Establish and use a standard template.
- Use an updated issues management log to obtain the status of any issues that require reporting or escalation (as defined in the PB Scope and Change Management Plan.
- Use an updated change management log to obtain the status of any changes that require reporting to, or approval of, the audience.
- Analyze all of the project information to be reported and develop recommendations for the audience.
- Schedule calendar reminders for status reporting deadlines.
- Distribute status reports electronically prior to meetings.

Email

The following protocols should be observed when communicating through email:

- Always include a subject line in your message and make the subject line meaningful.
- Keep to the subject as much as possible. If you need to branch off onto a totally new and different topic then it's often better to send a new message.
- Don't type your message in all uppercase - it's extremely difficult to read (although a short stretch of uppercase may serve to emphasize a point heavily). Try to break your message into logical paragraphs and restrict your sentences to sensible lengths.
- Use correct grammar and spelling.

- Always use a signature if you can: make sure it identifies who you are and includes alternative means of contacting you (e.g. phone and fax).
- Include enough information. If you are sending in a question to which you expect a response, make sure you include enough information to make the response possible.
- Electronic mail is about communication with other people. When you compose an email message, read it over before sending it and ask yourself what your reaction would be if you received it.

G. Method for Updating the Communications Plan

The PPC Project Controls Lead will maintain the Communications Plan. The plan will be reviewed on a quarterly basis for its effectiveness. Should issues arise related to project communications, the plan may be reviewed more frequently. Any updates that are deemed necessary will follow the procedures outlined in the PB Configuration Management Plan for modifying a configuration item (CI).

H. Communication Repository

Documents, logs, and select emails will be stored in the PB Project Repository as outlined in the PB Configuration Management Plan. Items stored will remain in the repository through Phase II implementation and then contents will be turned over to COVA.