

## PROJECT COMMUNICATIONS AND CHANGE MANAGEMENT PLAN

### OVERVIEW

#### PROJECT COMMUNICATIONS AND CHANGE MANAGEMENT AT UC BERKELEY

A key component of successful project management at UC Berkeley is a clear and concise communication and change management plan. Just as no two projects are the same, no two communication and change management plans follow the same playbook. However, there are many tools, techniques, and channels that make communicating and conducting change management more effective at UC Berkeley, and all project teams should consider these when developing their plans.

The following pages offer a template for developing a communication and change management plan for a project at UC Berkeley. If you choose, you can use your own planning template. Regardless of which template you use, the plan should provide the following information:

- The key audiences that need to receive project communications.
- A description of the segments of the campus community that will be impacted by the project.
- An outline of the communication and preparation that the campus community will need to receive for the implementation of the new services to be successful.
- How project team members will communicate with one another.
- A description of the project information that the project team, sponsor and key stakeholder need to receive.
- The communication tools that the project team will use to reach each stakeholder audience.
- The people who will be responsible for developing and delivering each project message.
- Where project documents are stored and maintained online.
- The timing and/or frequency of messages, reports, and meeting.

#### PROJECT NAME

The first step in developing a communication and change management plan is to determine the official name of your project. This may seem obvious, as many projects have had working names throughout the design phase. Before you begin to communicate with the campus community, consider if the working name will suffice. The considerations for a successful name are whether your project will primarily introduce a “back-office” or “front-office” solution. Back office projects are best served by descriptive names. Examples of descriptive names include:

- *Enterprise Data Warehouse – Governance;*
- *IT Application Life Cycle Management*

Front office projects will be deployed across campus and their success will depend on broad-based acceptance and adoption. These projects are best served by an illustrative or whimsical name. Examples include:

- *BearBuy*
- *Cal Planning*

#### AUDIENCES AND COMMUNICATION CHANNELS

This planning template includes a partial list of audience segments and communication channels available on the UC Berkeley campus.

#### DEVELOPING MESSAGING FOR YOUR PROJECT

Project communications are more effective if they use a consistent “project voice” that is **personal, authentic, strategic, and confident**. It is not necessary or appropriate for all messages to include all four of these attributes, but they serve as a guide for developing an overall voice for your project.

## **PERSONAL**

Although your project will bring about changes in tangible factors (process, systems, software, hardware, training, and techniques), ultimately, your project is about making people more productive and successful. Your project communications will be more accessible if they explain how the project will impact and help the members of the campus community.

## **AUTHENTIC**

Your project should neither ignore the difficult challenges ahead nor oversell the benefits of the proposed changes. Your project will gain credibility by giving a fair assessment of the challenges and expected outcome of each underlying change project.

## **STRATEGIC**

Proactively designing change allows UC Berkeley to strategically prepare for its financial and operational future, rather than let declining financial circumstances limit future options. Your communications should reiterate how your project supports the goals of the campus.

## **CONFIDENT**

In order to overcome the inertia of the status quo, your project communications needs to convey confidence that it is bringing necessary and positive changes to the campus. Your project needs to convey optimism that it will succeed in helping Berkeley position itself for the future.

## **PUTTING IT ALL TOGETHER**

Your project communications will be successful if your messages convey the enthusiasm of faculty, students, and staff for the positive changes that your project will bring to their personal and professional endeavors at UC Berkeley.

## **ARCHIVING YOUR MESSAGES**

Project teams will find it useful to keep a log of all messages that can be used in the future. Whenever you use a message that resonates with the intended audience, be sure to add it to the log so you can draw upon it in the future instead of continually drafting new content for each new communication project.

**NAME OF PROJECT:** \_\_\_\_\_

## PROJECT DESCRIPTION

Most project team members are so close to a project that they have difficulty describing their project in simple terms. It is important to be able to describe your project in three-to-four sentences that will convey the opportunity and the benefit. Your project description should include the:

- Name of your project.
- The problem it is trying to solve.
- The benefit of solving the problem (save money, save time, .more effective, etc.).
- The specific audience whose lives will improve because of it
- How the audience(s) endeavors will improve.
- The hoped-for benefit to UC Berkeley if the project is successful.

The description should have the following structure.

**(Name of Project)** will enable UC Berkeley to **(benefit)** by **(problem it will solve)**. When successfully completed, **(audience)** will become more effective by **(anticipated improvement)**.

## YOUR PROJECT DESCRIPTION:

## AUDIENCES

Below is a list of campus groups that you will want to consider when developing your communication plan. Check all audiences that you will want to communicate and consider whether they will need a general message or a specific message targeted for their group.

### YOUR PROJECT TEAM

- Project Manager
- Project Sponsors
- Project Team
- Project Steering Committee
- Other \_\_\_\_\_

### CAMPUS LEADERSHIP

- Vice Chancellors
- Chancellor's Cabinet
- Council of Deans

### FACULTY

- Council of Deans

- Academic Senate
- DIVCO
- Department Chairs

### STUDENTS

- ASUC Leadership
- Graduate Assembly Leadership
- Undergraduates
- Graduate – Professional
- Graduate – Academic

### STAFF

- [.] IT Governance Committees
- [.] IT Leadership Group
- [.] IT Community Council
- [.] Fund Raising Council



- Chief Administrative Officers Group
- Administrative Business Officer Group
- Campus Advisory Groups
- Chancellor’s Staff Advisory Committee
- Department staff meetings

**IT GOVERNANCE**

- IT Executive Council
- IT Strategy Committee
- Enterprise Applications & Data Committee
- Research, Teaching & Learning Technologies Committee
- IT Architecture & Infrastructure Committee
- Information Risk Governance Committee

**COMMUNITIES OF PRACTICE**

- Advising Network Community
- Agile Group
- AppNet
- Berkeley Drupal Group
- Berkeley Events Network
- Berkeley Research Administrators Group
- Business Process Analysis Working Group
- Cal Assessment Network
- Campus User-Centered Design Group
- Career Practitioners Group
- Coalition for Education & Outreach
- DataNet
- Micronet
- Social Learning
- Web Accessibility
- Webnet

**COMMUNICATIONS MEDIA**

Below is a list of the communication tools most frequently and effectively used at UC Berkeley. Some audiences may require multiple communication channels to be reached effectively. Check all tools that you are interested in using for your project communications.

**EXECUTIVE MESSAGING**

- Campus leadership
- Project leadership

**EMAIL**

- CalMessages broadcast email
- Cal Message subscription lists
- IST Mailing Lists
- Other campus email lists

**ELECTRONIC**

- Project web site
- Project blog
- Videos

**OFF CAMPUS- STAKEHOLDERS**

- UCOP
- UC Regents
- Donors
- UCB Foundation
- State Legislators
- Vendors
- Other UC Campuses
- Local City Councils
- Local Chambers of Commerce
- Parents
- Cal neighbors
- UC Berkeley Alumni

**STAFF ORGANIZATIONS**

- Alianza
- Berkeley Staff Assembly
- Berkeley Veterans
- Black Staff & Faculty Organization
- Cal Women’s Network
- Disabled Staff Network
- Lavender Cal
- Native American Staff Council

- PowerPoint
- Virtual Chat Rooms
- Newsletter
- YouTube
- Facebook
- Twitter

**EDUCATIONAL TOOLS**

- Campus training workshops
- Training manuals
- Infographics
- Information kits

**PUBLICATIONS- EDITORIAL AND/ OR ADVERTISING**





- The Berkeleyan
- The Graduate
- California magazine (alumni)
- Daily California

- Surveys
- OpinionSpace
- User polls
- Customer satisfaction surveys
- Anonymous email inbox

## **ENGAGEMENT AND DATA GATHERING**

### **PRINT**

- Newsletter
- Fact sheets
- Postcards
- Campus posters

### **EVENTS**

- Project launch event
- Town hall meetings
- Project road show

**TECOMMUNICATION PLAN FOR THE PROJECT TEAM, SPONSOR(S), AND STEERING COMMITTEE**

**PROJECT MANAGEMENT COMMUNICATION AUDIENCES, REQUIREMENTS AND PRACTICES**

Describe the communication requirements and practices that will be used with the project team and sponsor(s).

<b>AUDIENCE</b> (Name the group)	<b>INTEREST</b> (What information do they need from you for the project to succeed?)	<b>MESSAGE</b> (Fill in the “umbrella” message theme for this group. All future messages developed for this group should tie to this one overall theme.)	<b>CHANNELS</b> (Describe which tools you will use to reach this audience. You can name all tools here or use separate lines for major initiatives.)	<b>WHEN</b> (Describe the month or the frequency of the communication.)	<b>WHO</b> (List the name or initials of who will craft and deliver the message.)
<b>SPONSORS</b>					
<b>PROJECT MANAGER</b>					
<b>PROJECT TEAM</b>					

**PROJECT DOCUMENTS & REPORTS**

Describe the project documents that will be created and maintained and reports that will be issued during the course of the project.

REPORT TYPE	PURPOSE	REPORT PREPARER	INFORMATION CONTRIBUTORS	GROUPS RECEIVING	FREQUENCY OF DISTRIBUTION	DISTRIBUTION METHOD	ONLINE LOCATION WHERE STORED
PROJECT CHARTER							
SCHEDULE							
RISK PLAN							
STATUS REPORTS							
ISSUE LOG							
CHANGE REQUESTS							

**PROJECT MEETINGS**

Please list the types of meeting that will be held during the course of the project.

MEETING TITLE	PURPOSE	MEETING LEADER(s)	PARTICIPANTS	MEETING SCHEDULE
PROJECT KICK OFF MEETING				
PROJECT TEAM MEETINGS				
PROJECT STEERING COMMITTEE MEETINGS (May apply only to larger projects)				
SPONSOR MEETINGS				
CHANGE CONTROL MEETING				
RESTROSPECTIVE/ LESSONS LEARNED MEETING				
PROJECT CLOSING MEETING				



**CHANGE MANAGEMENT AND COMMUNICATION PLAN: SPECIFIC STAKEHOLDER AUDIENCES FOR YOUR PROJECT**

**CHANGE MANAGEMENT FOR SPECIFIC STAKEHOLDER AUDIENCES**

List the key campus stakeholders who will be impacted by the project and/or will be using the services created by it. Describe the stakeholders’ current understanding of the project and their use of similar products and services.

<b>KEY STAKEHOLDERS</b> (List the key stakeholders who will be using the product and services created by the project.)	<b>CURRENT STATE</b> (Describe the stakeholders current understanding of the project, experience with similar existing products and services, and needs and concerns about transitioning to the new services created by the project.)	<b>FUTURE STATE</b> (Describe the understanding that key stakeholders will need to prepare for the successful adoption of the services created by the project.)	<b>ACTIONS TO MOVE CURRENT TO FUTURE STATE</b> (Describe the actions that will be taken to transition the key stakeholders from the current state to the future state.)	<b>CRITERIA FOR SUCCESS</b> (Describe how the project team, sponsor(s) and governance committee will know that the key stakeholders have successfully transitioned from the current state to the future state.)

**COMMUNICATION PLANS FOR SPECIFIC STAKEHOLDER AUDIENCES**

Describe the communication requirements and practices that will be used with the key stakeholders.

<b>KEYSTAKEHOLDERS</b> (Name the group)	<b>INTEREST</b> (What information do they need from you for the project to succeed?)	<b>MESSAGE</b> (Describe the “umbrella” message for this group. All future messages developed for this group should tie to this one overall theme.)	<b>CHANNELS</b> (Describe which tools you will use to reach this audience. You can name all tools here or use separate lines for major initiatives.)	<b>WHEN</b> (Describe the month or the frequency of the communication.)	<b>WHO</b> (List the name or initials of the person who will craft and deliver the message.)
<b>CUSTOMERS</b>					
<b>EXECUTIVE LEADERSHIP</b>					
<b>FACULTY</b>					
<b>STUDENTS</b>					
<b>STAFF</b>					