

Project Name:	Department of Energy BMIS-FM
Project Number:	BMIS-FM Phase I
DOE Proj Mgr:	Michael Fraser
IBM Proj Mgr:	Don A. Cox, PMP



PROJECT COMMUNICATIONS MANAGEMENT PLAN for
Department of Energy BMIS-FM Project

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Approvals

The following people have approved this document. (Sign below name)

Name	Function
Michael Fraser	DOE Program Manager
Signature	Date:

Don A. Cox	Team IBM Program Manager
Signature:	Date:

Distribution

This document has been distributed to:

Name	Function

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Communications Management Plan

1. Objectives

- 1.1. The purpose of the Communications Management Plan is to document the methods required to ensure timely and appropriate generation, collection, dissemination, storage, and ultimate disposition of project information. This document is intended for the internal use of the BMIS-FM project team with the express purpose of controlling communications in the administration of project team efforts. The Department has developed a separate BMIS-FM Project Communication Plan that references specific requirements for communicating to both internal and external stakeholders. This document incorporates the Department's BMIS-FM Project Communication Plan by reference. In addition, the project cultural change management team will continue to evolve the Department's BMIS-FM Project Communication Plan as they evaluate the organization, DOE staff, project and product dynamics. This is part of an overall proactive strategy to optimize acceptance of the inevitable change an organization must undergo to effectively leverage this critical investment in people and technology.

2. Available Channels of Project Communications

- 2.1. The BMIS-FM Project Team must contend with a large project team spread out across multiple locations and multiple time zones. For these reasons, it is imperative that the project team creatively leverage available channels of project communications, formats, and media based on the specific needs of any given forum.
- 2.2. The project support coordinator will maintain a project team roster. The roster will include team members' contact information:
 - 2.2.1. Name, address, work telephone
 - 2.2.2. Pager, cell phone
 - 2.2.3. E-mail address(es)
- 2.3. Face to face meetings between project team members are necessary and appropriate. Formal, scheduled meetings should be conducted according to the protocol outlined in the section "Conduct of Meetings".

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- 2.4. Use of telephones is encouraged where geographic location makes direct, face-to-face meetings impossible. Teleconferencing is a useful alternative available to the project team. For more information, refer to the section “Conduct of Meetings”.
- 2.5. The Department can provide video conferencing as a communications alternative. For more information, refer to the section “Conduct of Meetings”.
- 2.6. A BMIS-FM Project Web-site will be established on the DOE intranet. This will provide an excellent method for communicating to the most remote areas of their organization with access through DOENET. For more information, refer to the section “Project Document Control and Archival”.
- 2.7. All important communications should be made in an acceptable written format. Acceptable formats would include e-mail, letter, memorandum, or other formats approved by the DOE and/or Team IBM project managers.
- 2.8. The sender of a communication is responsible for ensuring that the receiver understood the message as intended.
- 2.9. The receiver of a communication is responsible for listening and verifying the content of the message to ensure they understood the sender.

3. Project Document Control and Archival

- 3.1. Various project related documents will be created by many different individuals during the execution of the BMIS-FM project. It is important that a standard, simplified protocol is developed to administer these documents. The following guidelines will apply:
 - 3.1.1. In general, documents will adhere to the following standards:
 - 3.1.1.1. The Team IBM project manager has created a document style template that will be utilized by the project team.
 - 3.1.1.2. Where applicable, the documents will have page numbers, font of Time New Romans 12, be left justified, 1” margins on both left and right, and stored in Word 97 format.
 - 3.1.1.3. Documents to be published to the intranet site must be available in both HTML and Adobe Acrobat (.pdf) formats.
 - 3.1.2. The individual creating the document is responsible for routing it to the appropriate individuals as well as ensuring it is properly loaded on the BMIS-FM web-site, if appropriate.
 - 3.1.2.1. Any documents created by members of Team IBM and subject to review outside Team IBM must be routed to the Team IBM



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project manager or deputy project manager prior to sending it outside the team.

3.1.2.2. Any documents created by the BMIS-FM project team, and subject to review outside of the BMIS-FM project team must be routed to the DOE project manager or delegate prior to sending outside the team. This includes any documents published to the BMIS-FM project web-site.

3.1.2.3. The project archives should hold all project documents of any consequence. In general, whether the document is to be included in the project archive will be up to the discretion of the individual creating the document. However, the DOE or Team IBM project managers, or the individual's team lead may direct the individual to route the document for storage in the project archive. The project support coordinator maintains the project archive, therefore, the individual creating the document will route copies (upon final review) to the project support coordinator with instructions as to disposition (whether document should be filed, type of document, whether it is to be published to the BMIS-FM project web-site).

3.2. Specific work products and deliverable documents associated with a given project phase will be generated throughout the project, and are the key intellectual capital artifacts for the Department and BMIS-FM project team. Paper copies will be stored in the proper physical file location under the section for the specific project phase (Prepare, Focus, etc.). Electronic copies will be stored in the appropriate folder where the path is: \Project Directory \ *Project Phase Name*. The project support coordinator, project team leads, and DOE and Team IBM project managers will have the authority to store electronic copies in the project directory. Refer to the network file structure diagram below.

3.3. The references and documentation produced from the following communication formats will become part of the document repository for this project. In general, all physical copies of specific documents will be stored in a physical file location maintained by the project support coordinator. All electronic copies of documents that are captured for reference or recording purposes will be filed in the proper area of the network directory as discussed in section 3.2.

3.3.1. Meetings:

3.3.1.1. Meeting minutes must be published following each formal meeting.

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- 3.3.1.2. Paper copies of minutes will be stored in the proper physical file location under the section for meeting minutes, and copies of the most recent project team lead meetings will be posted on the bulletin board by the project support coordinator.
- 3.3.1.3. Electronic copies of minutes will be stored in the appropriate electronic folder (Example, 2001-03 is where all minutes published anytime during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Communications \ Meeting Documents. The meeting should be stored with a brief descriptive title and the date (i.e. All-hands 20001107.doc).
- 3.3.2. E-mail – E-mail will be a major source of communications for this project. Any e-mail communications referencing project progress, status, delays, issues or concerns should become part of the permanent project archive. Paper copies of e-mail can be stored in the proper physical file location under the section for e-mail and in the appropriate electronic folder, (Example: 2001-03 is where all Email sent or received during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Communications\E-mail. The e-mail should be stored with a brief, descriptive title.
- 3.3.3. Teleconference or Videoconference – These will be handled as formal meetings with meeting minutes published accordingly and archived in the manner described above.
- 3.3.4. Memorandum – from time to time, the DOE or Team IBM project manager may publish a document as a memorandum. Paper copies of memos can be stored in the proper physical file location under the section for memorandums, and in the appropriate electronic folder. The path to the proper folder is \Project Directory \ Project Communications \ Memorandums. The memorandum should be stored with a brief descriptive title.
- 3.3.5. Letters and Documents – project related letters to be sent outside of the project team, will be handled according to the Department’s BMIS-FM Communications Management Plan. Paper copies of letters will be stored in the proper physical file location under the section for correspondence and in the appropriate electronic folder, (Example: 2001-03 is where all correspondence sent or received during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Communications \ Correspondence. Letters and documents should be stored with a brief descriptive title.



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3.3.6. Project Calendars:

- 3.3.6.1. The project support coordinator will maintain a copy of the project calendar. This document will reflect regularly scheduled meetings, key project milestones and deliverables, and individual team members' vacation periods greater than or equal to 3 days. A current copy of this calendar will be posted in the proximity of the project support coordinator's work area, and provided to individual project team members on request. A current copy of the calendar will be posted to the BMIS-FM Project web-site.
- 3.3.6.2. Paper copies of the calendar will be stored in the proper physical file location under the section for calendars and in the appropriate electronic folder. The path to the proper folder is \Project Directory \ Project Communications \ Calendars. The calendar should be stored with the type, month and year (VAC032000.doc).
- 3.3.6.3. The Team IBM project manager will maintain project calendars in conjunction with the development and administration of project plans using MS Project. These calendars will reflect DOE and Team IBM holidays, work schedules, and individual vacation time off.
- 3.3.6.4. Team leads will be responsible for maintaining a calendar of their teams work schedules in a format of their choosing.
- 3.3.7. Presentations – from time to time, the DOE or Team IBM project manager may request development of a formal presentation in MS PowerPoint or some other similar format. Paper copies of presentations can be stored in the proper physical file location under the section for presentations, and in the appropriate electronic folder. The path to the proper folder is \Project Directory \ Project Communications \ Presentations. The presentation should be stored with a description of the purpose and the date (CMIP Qtrly 110700.ppt).
- 3.3.8. Miscellaneous Word Documents – from time to time, the DOE or Team IBM project manager, or other project team members may publish an important document not normally considered a work product or deliverable for any given project phase. These documents will be captured as part of the project archive, and as such, paper copies can be stored in the proper physical file location under the section for miscellaneous Word documents, and in the appropriate electronic folder. The path to the

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proper folder is \Project Directory \ Project Communications \ Misc. Word Documents.

- 3.3.9. Miscellaneous Spreadsheets - from time to time, the DOE or Team IBM project manager, or other project team members may publish an important spreadsheet not normally considered a work product or deliverable for any given project phase. These spreadsheets will be captured as part of the project archive, and as such, paper copies can be stored in the proper physical file location under the section for miscellaneous spreadsheets, and in the appropriate electronic folder. The path to the proper folder is \Project Directory \ Project Communications \ Misc. Spreadsheets.
- 3.3.10. Project Performance Reports – Where appropriate, paper copies of project performance reports will be stored in the proper physical file location under the section for project reports and in the appropriate electronic folder, (Example: 2001-03 is where all performance reports published during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Reports. Refer to the file storage diagram for specific folders. The exception would be project performance reports that are internally generated from MS Project, which are generated as required from the software.
- 3.3.11. Project QA/QC Documents – This includes quality assurance, quality control, and scope verification documents. Paper copies will be stored in the proper physical file location under the section for Project QA/QC Documents. Electronic copies will be stored in the appropriate folder where the path is: \Project Directory \ Project QA/QC Documents.
- 3.3.12. Project Control Documents – This includes change management requests, cost/schedule variance analysis and corrective action, and risk management documents. Paper copies will be stored in the proper physical file location under the section for Project Control Documents. Electronic copies will be stored in the appropriate folder where the path is: \Project Directory \ Project Control Documents.
- 3.3.13. Project Web-site – Various documents will be published to the BMIS-FM Project web-site. However, any document to be published to the web-site must be reviewed by the DOE project manager.
 - 3.3.13.1. Once approved, the individual creating the document will pass a copy to the project support coordinator in both electronic and hard-copy formats.



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3.3.13.2. The project support coordinator will generate an HTML copy and an Adobe Acrobat (.pdf) format copy of the document and route these copies to the BMIS-FM web-site administrator.

3.3.13.3. Paper copies of various documents can be stored in the proper physical file location as described above, depending on type. HTML and .pdf formats will be stored in the appropriate electronic folder. The path to the proper folder is \Project Directory \ Project Communications \ Webdocs or \Project Directory \ Project Reports \ Webdocs

4. Conduct of Meetings

4.1. Coordination and Scheduling of Meetings

4.1.1. Regularly scheduled meetings should be coordinated through the project support coordinator. These will be documented on the project calendar.

4.1.2. Every scheduled meeting must have a meeting owner.

4.1.3. A “*Meeting Coordination and Control Document*” document will be utilized for any scheduled meeting. This document is available from the project support coordinator, and must be completed by the meeting owner. This document will allow coordination and acquisition of supplies, equipment, and other resources for the project meeting.

4.1.4. Teleconferences may be scheduled by contacting the “Meet-me” conference call group. The project support coordinator will control setup of conference calls based on information supplied on “*Meeting Coordination and Control Document*”. The meeting owner is responsible for ensuring that a call-in number has been assigned, and distributed to meeting participants prior to the scheduled meeting.

4.2. Each scheduled meeting must have a meeting agenda. In the case of regularly scheduled, recurring meetings, a standing agenda may be utilized. The meeting owner is responsible for ensuring that an agenda has been created and distributed to meeting participants prior to the scheduled meeting.

4.3. Each meeting should be conducted in a professional manner, according to the Project Team Charter.

4.4. Each meeting should begin at the scheduled start time, and as much as possible, end at or before the scheduled end-time.

4.5. Recording of Meeting Minutes will be handled as detailed in section 2.1.2 above.

4.6. Distribution of Related Materials will be handled as detailed in the “*Meeting Coordination and Control Document*”. Related materials should be distributed in



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a timely manner. The meeting owner is responsible for ensuring that related materials have been created and distributed to meeting participants prior to the scheduled meeting.

5. Project Team Communications Audiences and Requirements

- 5.1. The BMIS-FM Project Cultural Change Management Team will analyze Departmental dynamics and recommend a focused communications strategy designed to optimize project communications and acceptance of the product of the project. This document is a separate work product and will be developed at a date identified in the detailed project plan.
 - 5.1.1. By targeting specific communications media, channels and content, the project team increases the probability of overall acceptance of the end-product, reduces the likelihood of ‘over-communicating’ project information or targeting the wrong group with a given message.
 - 5.1.2. By monitoring the target audience, the project team can better focus information in a positive, informative way and take corrective action as necessary. Specific stakeholders and stakeholder groups will be identified and classified.
 - 5.1.3. By scheduling information releases in a coordinated way, the project team can help ensure that end-users are notified of pending changes at the right time, optimizing the acceptance of the end result.
- 5.2. The DOE project manager will request, review and approve documents generated by the combined DOE and Team IBM project teams where the audience for the document is an external entity and generation of the documents are governed by the Department’s BMIS-FM Communications Management Plan.
- 5.3. DOE Project Manager’s key responsibilities related to project communications are as follow:
 - 5.3.1. Primary responsibility for communication with external agencies based on the Department’s BMIS-FM Project Communications Management Plan.
 - 5.3.2. Keep DOE management and other stakeholders informed of project status, progress, events, and milestones.
 - 5.3.3. Keep the Team IBM project manager apprised of any Department issues, events, activities or factors that may impact the BMIS-FM project.
 - 5.3.4. Awareness of overall project status, including schedule and budget performance, scope verification, risk factors and events, and open project issues.
 - 5.3.5. Awareness of resource scheduling, project deadlines and requirements.

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- 5.3.6. Awareness of project milestone, deliverable and work product status.
- 5.4. Team IBM Project Manager's key responsibilities related to project communications are as follow:
 - 5.4.1. Maintain constant flow of project status, progress, issues and related information to the DOE project manager and project team leads.
 - 5.4.2. Act as a central clearinghouse of information to the project team leads.
 - 5.4.3. Awareness of overall project status, including schedule and budget performance, scope verification, quality assurance and control, risk factors and events, and open project issues.
 - 5.4.4. Awareness of resource scheduling, project deadlines and requirements.
 - 5.4.5. Awareness of project milestone, deliverable and work product status.
- 5.5. Project Business Manager's key responsibilities related to project communications are as follow:
 - 5.5.1. Maintain constant flow of project financial performance status, invoicing, time tracking, and project business administration information to the DOE and Team IBM project managers.
 - 5.5.2. Act as a control point for project business administration between Team IBM business partners.
- 5.6. Project Support Coordinator's key responsibilities related to project communications are as follow:
 - 5.6.1. Maintain constant flow of project administration information including project calendar, scheduled meetings, forms dissemination and completion to the project team.
- 5.7. Project Team Leads' key responsibilities related to project communications are as follow:
 - 5.7.1. Maintain constant flow of project team status information to the Team IBM project manager.
 - 5.7.2. Maintain constant flow of information from DOE and Team IBM project managers to project team.
 - 5.7.3. Immediately notify the risk manager or the Team IBM project manager of any risk factors or events not previously identified.
 - 5.7.4. Awareness of overall project status regarding milestones and potential shifts in resources necessary to maintain project schedule.
 - 5.7.5. Awareness of individual team member's task assignments, progress.



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- 5.8. Project Team Members' key responsibilities related to project communications are as follow:
- 5.8.1. Maintain constant flow of task and activity progress and status information to the assigned team lead.
 - 5.8.2. Immediately notify the project team lead, risk manager or the Team IBM project manager of any risk factors or events not previously identified.
 - 5.8.3. Awareness of overall project status regarding milestones and potential shifts in resources necessary to maintain project schedule.
 - 5.8.4. Awareness of task assignments, progress.

6. Scheduled Status Reporting

- 6.1. Weekly status reports.
- 6.1.1. Individual Team IBM project team members will receive a copy of the ENG 330 Individual Status Report template. Each member of the project team will produce a written status report on a weekly basis, and submit the report to their team lead. Paper copies of individual status reports will be stored in the proper physical file location under the section for individual status reports. Each team lead will provide paper copies to the project support coordinator for filing. Electronic copies will be stored in the appropriate monthly folder, (Example: 2001-03 is where all Status Reports published during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Reports \ Individual Status Reports. The reports will be stored using the initials of the individual, the month and day of the last day of the reporting period (DAC0325).
 - 6.1.2. The project co-team leads will consolidate the individual team member reports into a summary report using the same template. This report will be provided to the Team IBM project manager prior to the weekly project status meeting on Tuesdays of each week. Paper copies of team lead status reports will be stored in the proper physical file location under the section for team lead status reports. Each team lead will provide a paper copy to the project support coordinator for filing. Electronic copies will be stored in the appropriate monthly folder, (Example: 2001-03 is where all Status Reports published during March 2001 will be filed). The path to the proper folder is \Project Directory \ Project Reports \ Team Lead Status Reports. The reports will be stored using the initials of the team lead, the month and day of the last reporting period (DAC0325).
 - 6.1.3. The Team IBM project manager will prepare a summary status report for the Friday project status meeting with the DOE project manager. Form

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ENG 348 Project Status Report will be used for this purpose. Paper copies of project status reports will be stored in the proper physical file location under the section for PM status reports. The path to the proper folder is \Project Directory \ Project Reports \ PM Status Reports.

6.2. Other Suggested Monthly Reports.

6.2.1. The Team IBM project manager may provide the DOE Project Manager with the following:

- 6.2.1.1. Project Summary Report – created as a standard report from Microsoft Project.
- 6.2.1.2. Project Milestone Report – created as a standard report from Microsoft Project.
- 6.2.1.3. Earned value analysis – created as a standard report from Microsoft Project.

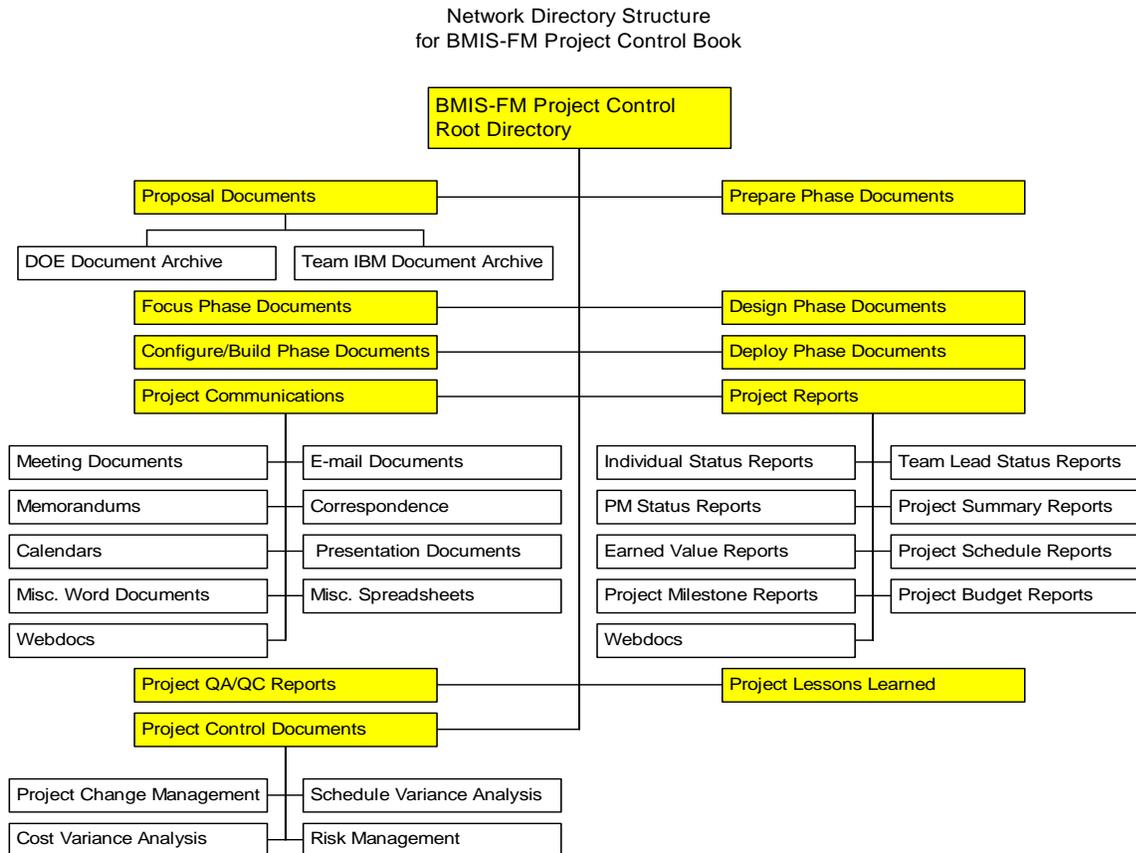


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7. Document Network Directory Structure

7.1. The following is a high level view of the document directory structure that has been set up and will be utilized for all project documentation, deliverables and reports. The lower level view of this structure defines where email, minutes, letters and supporting documents are to be filed.



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8. Communications Change Control Processes

- 8.1. All modifications to this Project Communications Management Plan must go through the following Change Control process:
 - 8.1.1. Fill out a “*Change Request Form*” and submit the “*Change Request Form*” along with required supporting documentation to the Team IBM project manager.
 - 8.1.2. The Team IBM project manager will review the change request and may possibly request additional documentation prior to review with the DOE project manager.
 - 8.1.3. The Team IBM and DOE project managers will determine if the change should be:
 - 8.1.3.1. Approved, in which case both project managers will check the approved box, sign off on the change request and the Team IBM project manager will incorporate the change and adjust other project planning factors as necessary.
 - 8.1.3.2. Approved pending additional supporting documentation, in which case both project managers will check the approved / pending box, sign off on the change request and the Team IBM project manager will specify the further required documentation, incorporate the change and adjust other project planning factors as necessary.
 - 8.1.3.3. Denied, in which case both project managers will check the denied box, sign off on the change request and the Team IBM project manager will notify the requestor of the status and reason for denial.
 - 8.1.4. The Team IBM project manager will document the Change Request outcome as necessary (update WBS, schedule and budget documentation if impacted).

9. Associated Documents

- 9.1. DOE BMIS-FM Project Communications Plan
- 9.2. BMIS-FM Change Management Team Change Readiness Assessment
- 9.3. Staff Contact Lists
- 9.4. Assumptions and Constraints Document
- 9.5. Various generated reports and templates