

USDA Forest Service
USDI Bureau of Land Management

KM Communications Plan



Draft: Version 3.1



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Note: The USDA Forest Service (FS) and USDI Bureau of Land Management (BLM) greatly appreciate the willingness of the Federal Aviation Administration (FAA) to share its knowledge sharing documents. Reflecting the true spirit of sharing and collaboration, this gesture enables the FS and BLM to learn from and build on FAA's extensive research in this area.



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1.0 Communications

Communications plays an important role in all phases of change management. In the initial phase of change, messages to USDA Forest Service (FS) and USDI Bureau of Land Management (BLM) organizations will shape workers' desire to grasp new concepts and use new tools in the joint knowledge management (KM) portal. During the transition phase, the focus of communications changes to articulation of more specific information about the joint KM portal and the status of implementation. In the final phase, communications encourages users to pursue new uses of the joint KM portal. During this phase, we will develop a feedback loop to invite comments and suggestions.

The first step in communications is to develop a communications plan, an important part of any change management strategy. A communications plan lays out the strategies and activities required to develop consistent messages about the joint KM portal for stakeholders, users, and future participants. There are four dimensions to a communications plan:

- Establish communications objectives.
- Identify audiences that need to be reached.
- Develop messages that need to be included in communications materials.
- Develop a strategy for monitoring and evaluating communications against the stated objectives.

1.1 Establish Communications Objectives

An effective communications program will pay high dividends in fostering positive impressions and supportive opinions in the target audiences.

The goal of the Joint KM Portal is to transform the two agencies into a networked workforce and leverage intellectual capital. To accomplish this objective, the joint KM portal must begin by achieving the following communications objectives:

- Present a clear, concise, and consistent message about the joint KM portal. Although individual communications initiatives are underway within each organization, an overarching, joint KM portal communications plan is critical to delivering a clear and compelling message. The Chief Knowledge Officer (CKO), with input from Interagency Knowledge Management (IKM) Team, intends to develop such a plan to provide an unambiguous approach to communications that in turn will provide a consistent outcome.
- Reach geographically dispersed target audiences by developing various types of communications materials and by leveraging official, unofficial, and internal FS and BLM communications venues. Employees located in remote regions of the country will have access to information related to the portal.

1.2 Identify Audiences

Initially, the following FS and BLM organizations will participate in the joint KM portal pilots:

- The FS Ecosystem Management Coordination.
- One other group, to be determined.



When these pilots conclude, the portal will be expanded to new FS and BLM organizations.

Communications will focus on two distinct audiences within the FS and BLM, the general FS and BLM population and specific FS and BLM organizations. Communications across the FS and BLM is important to ensure managers and staff are aware of the project, its goals and objectives, potential benefits, the expansion plan, how they can participate, and timetables for implementation. Regular messages targeted will begin once the project has started.

Communications targeted to the FS and BLM organizations is equally important. Ongoing communications starting early in the implementation stage will provide detailed information about how the joint KM portal will affect work processes.

1.3 Communications Team

To ensure development of effective communications materials that are consistent with the FS and BLM messaging strategies, the joint KM portal will assemble a dedicated communications team. This team will include representatives from the following FS and BLM organizations:

- Joint KM portal developer.
- Joint KM portal individual organization advocates.
- The FS KM Working Group Communications Subcommittee.
- The BLM Associate Director for Communications.
- Contractor change management support.
- Union representatives.

The joint KM portal communications team will be assembled before implementing the portal and will leverage the expertise of each team component to keep develop communications materials. The team will coordinate its activities with the offices of communications within both agencies.

1.4 Develop Communications Messages

Consensus building by FS and BLM leadership on the value of the portal will be critical to creating an effective communications strategy. In this regard, the joint KM portal should be an agenda item for the agencies’ senior leader meetings.

The joint KM portal change management program will identify communications initiatives to ensure effective messages and media for each purpose and audience. To ensure effective penetration of the message, the team will choose several methods of communications to reach the diverse audience.

Below are listed some of the initiatives the communications team will undertake:

Initiative	Description
Joint KM portal newsletter	Develop a periodic publication to distribute to FS and BLM staff and other user organizations.
Agency heads’ message to encourage participation	Distribute written message from agency heads on the kickoff of the joint KM Office.
Articles in internal FS and BLM publications	Write articles for publication.



Business cards	Produce and distribute business cards with the Joint KM portal's Web address and POC or help desk telephone number.
Brochures	Develop and distribute brochures to all managers and staff describing the joint KM portal and how to gain access.
Chat sessions	Host periodic chat sessions with managers and staff to discuss the status of the joint KM portal.
Professional conference participation	Attend conferences to show the joint KM portal functionality and benefits.
Executive briefings	Establish executive briefings that relay the joint KM portal message and serve as a way to show the benefits of the joint KM portal.
Information papers	Develop and deliver information papers to all employees describing the joint KM portal and how it might affect them.
Links to the joint KM portal site	Establish links from the FS and BLM home page to the joint KM portal home page.
Media clips	Develop media clips for distribution throughout the two agencies.
Kiosks	Develop a unit with a self running demo of the joint KM portal for display in the lobby of FS and BLM headquarters, regional offices, and large centers.
Posters	Develop posters with the joint KM portal's Web address, logo, with POC, and help desk telephone number.
Joint KM portal display booth	Develop a joint KM portal display booth to transmit the project's message at conferences, meetings, and other gatherings.
Quick reference guides	Develop high-level guide(s) to support users in system access and functionality, to include user support information.

Table 1-1 — Potential Joint KM Portal Communications Initiatives

1.4.1 Effective communications

Effective communications leverages three dimensions: content, graphics, and medium. The communications team will use the following principles as they apply to these dimensions:

- **Content** – Content will be significant and informative. Initiating a regular communications vehicle, such as a newsletter, creates expectations from the targeted audience. It is important to send an accurate message to ensure the portal's credibility.
- **Graphics** – Graphics and colors play a pivotal role. Because the graphic presentation is the first and most lasting impression people will have, it must be of outstanding quality
- **Medium** – The medium that carries the message is also critical. Newsletters, brochures, media clips, and related paper-based tools are invaluable. The style and overall "look" of a publication needs to be consistent with other communications initiatives related to the topic.

1.5 Message Development

As depicted in Figure 1.1, there are four fundamental steps to developing communications materials.

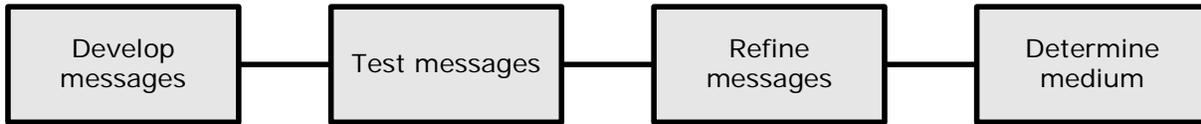


Figure 1.1 — Communications Message Development Process¹

Each of the following steps in developing a message is important in creating effective communications materials:

- **Developing messages** – Messages need to be clear and concise. The Communications Team needs to develop value statements that state the benefits of the portal. They answer the question "What do we want the user to think about the joint KM portal?" Because people generally remember only three or four thoughts about a topic, messages should be short and narrowly focused
- **Test messages** – Once messages have been developed, they need to be tested for effectiveness. It is important to select a diverse group of people to participate in testing to allow a structured analysis of the results as feedback for improving a message.
- **Refine messages** – After testing a message, the team will modify the messages, incorporating user comments.
- **Determine medium** – After messages have been fully developed and polished, the team will select an appropriate medium. The medium will incorporate the chosen messages and create a consistent "look" for the project.

Early communications initiatives will convey the following points about the joint KM portal to field users:

- Why the portal was developed.
- How the portal will affect people, organizational structure, and culture.
- Optimal use of the environment.
- Benefits using the portal.

To support each initiative, the joint KM portal communications team will develop materials and present them to the management team for approval before production and distribution. A monthly project newsletter will be a key venue for communications. The team will regularly monitor the effectiveness of the newsletter once it is underway. It will also discern whether the communications efforts need modification and modify them as appropriate.

1.6 Communications Execution Plan

1.6.1 Message delivery: General FS and BLM versus organization-specific audiences. Delivery of communications for the portal will use two approaches: opportunistic and focused. Outreach to general FS and BLM audiences will be opportunistic. Briefings and presentations will use the following guidelines:



- The joint KM portal communications team will conduct briefings and presentations as opportunities arise.
- The team will build relationships with USDI and USDA officials to gain wide acceptance of the portal.
- The team will foster user relationships among organizations participating in the pilot.

In communicating a message to general FS and BLM audiences, the team will use the following guidelines:

- Within the FS and BLM, the message about the portal will be targeted to specific audiences:
 - Executives.
 - Managers.
 - Staff.
- For general FS and BLM audiences, the message about the portal will be delivered by several means:
 - Peer teaching.
 - Participation in conferences.
 - Publications.
 - The FS and BLM home pages.
 - Briefings.

The portal communications effort for specific FS and BLM organizations and audiences will be focused and use the following guidelines:

- Communications will identify target segments.
- Communications will take place on established dates.
- Communications will be flexible enough to adjust to:
 - Mission changes.
 - New requirements.
 - Changes in emphasis.
 - The FS and BLM evolving priorities.
- The communications plan will be a “living document” to be updated as required.

A key challenge for the joint KM portal communications team is to ensure the consistency of project- and organization-focused communications. Though approaches may differ, the need for coordination and consistency of activities and messages exists for both types. Initially, coordination will occur through regular bi-weekly conference calls. As the portal develops, the two agencies anticipate that conference calls will transition to an online discussion forum.

The communications initiatives tailored to individual FS and BLM organizations will be primarily educational and emphasize the following:

- Introducing prospective users to the portal.
- Educating prospective users about portal capabilities and benefits.



- Promoting usage of the portal as a vehicle to address business challenges.
- Sharing status reports.
- Publishing training opportunities and schedules.
- Publishing availability of user support.
- Establishing a feedback mechanism.

One of the first tools to be launched is an expertise locator called Sage. The communications plan must promote the use of this tool by showing the benefits to employees of both agencies.

Regularly scheduled communications activities at individual FS and BLM organizations will vary based on need. Examples include newsletters, discussion groups and the "what's new" area of the portal.

In communicating a message to FS and BLM organizational audiences, the portal will follow these guidelines:

- The message will be targeted to two audiences:
 - FS and BLM organizations advocates of the joint KM portal.
 - Users.
- Within the FS and BLM organizations, the communications message will be delivered by:
 - Briefings (using the executive brief).
 - Articles in electronic and printed media.
 - Organizational training or coaching activities.
 - Messages on the FS and BLM home pages.

FS and BLM will also pursue existing opportunities to reach large audiences. Examples might include:

- Forest Service Today.
- Chief's messages.
- [Need input from the BLM].

1.6.2 Key Communications Success Factors

The following items are key to a successful communications program for the portal:

- Communications plan needs buy-in from management, the joint KM portal developer, and Joint Executive Advisory Board (JEAB).
- Those parties should think of communications as an investment.
- Messages must be consistent.
- The communications method should feature varied approaches, including posters, business cards, and others for distribution to various audiences and stakeholders.
- Communications materials must provide readers with a feeling of confidence about the portal.



1.7 Evaluating Communications Success

Given the importance of good communications to the successful implementation of the portal, it is important to evaluate the effectiveness of communications activities. The portal project team will develop measures to assess the impact of communications.

Measurement of the effectiveness and consistency of communications messages and venues will require the use of surveys and other feedback mechanisms, including random surveys for targeted audiences. The project team has not yet developed indicators to measure the effectiveness of communications; however, these indicators may be developed with either internal or contractor support. To the extent possible, they should be objective and quantifiable so the project team can modify the plan based on the data gathered.

2.0 Marketing

Table 2-1² shows an organization’s marketing maturity level KM communications. KM marketing ranges: from ill-defined and reactionary to interactive and strategic. KM liaisons who hope to play the role of strategic partners need to ramp up the maturity level of their communications programs.

LEVEL	1 Ad hoc	2 Demand-based	3 Process-based	4 Customer proactive	5 Enterprise and KM proactive
MARKETING FOCUS	Communications is occasion-specific and usually driven by projects or reactive reporting needs	Reactive communications driven by recurring demand for status information on projects or overall KM performance	Regular status communications at the KM portfolio level and on overall performance	Proactive interaction with customers through regular meetings and documents that address current and future performance	Proactive interaction with entire customer community and individual customers
PRIMARY MARKETING TOOLS	<ul style="list-style-type: none"> Status reports Briefings 	<ul style="list-style-type: none"> Project-level scorecards 	<ul style="list-style-type: none"> Newsletters Recurring planning meetings 	<ul style="list-style-type: none"> Quarterly business reviews Newsletters Scorecards 	<ul style="list-style-type: none"> Board-of-director style KM governance, with regular reports Scorecards with lagging and leading indicators KM information available in real-time
KM ROLE IN ENTERPRISE	Factory/ commodity	Factory/ commodity	Preferred partner	Preferred partner	Strategic partner

Table 2-1 See Our Level

3.0 Training

Note: This document distinguishes between training, which is usually associated with formal classroom or online instruction with a beginning date



and an end date and learning, which takes place continually as people perform their jobs.

The joint KM portal introduces new business processes and tools to FS and BLM organizational users. These processes and tools allow users to share knowledge more effectively across geographical and organizational boundaries, to easily identify and communicate with subject matter experts (SME), and to collaborate more effectively while developing documents or addressing management or operational issues.

To integrate these processes and tools into the workplace, the FS and BLM will need to provide training before implementing the portal. The project team will develop and provide the right training, for the right audience, at the right time, addressing the challenge of training a diverse community of users who are widely dispersed. To do so, the project team will follow a standard approach as presented in this section.

3.1 Establish Training Objectives and Identify Target Audiences

Training is an essential component of the transition phase of change management. Throughout this phase, new users will need information to help them learn about the new processes and tools they will use in their jobs. After implementation, the need for training will decrease and will likely focus on introducing new tools.

The first step in developing and implementing a training program involves establishing a clear set of objectives. This usually requires planners at the same time to identify and profile the target audience so that training objectives and audiences are properly aligned.

The types and level of training new users will require will depend on their jobs and their level of experience with computers and Web-based tools. The program will ensure that each training initiative begins by establishing clear objectives that are appropriate to the target audience. Each training document or presentation will begin by describing its target audience and stating the learning objectives.

3.2 Develop Training Content

The joint KM portal project team will develop training materials that meet the requirements of the various roles and responsibilities associated with the portal. These materials will address the needs of users (with varying levels of access), domain (or database) managers or owners, and knowledge officers. Because users will have various levels of experience with computers and Web-based tools, a combination of training formats will be used. As seen in Figure 3.1, these include but are not limited to the following:

- Basic orientation program.
- Supplemental FS and BLM organization-specific training materials.
- Online tutorials.
- Formal and informal coaching.

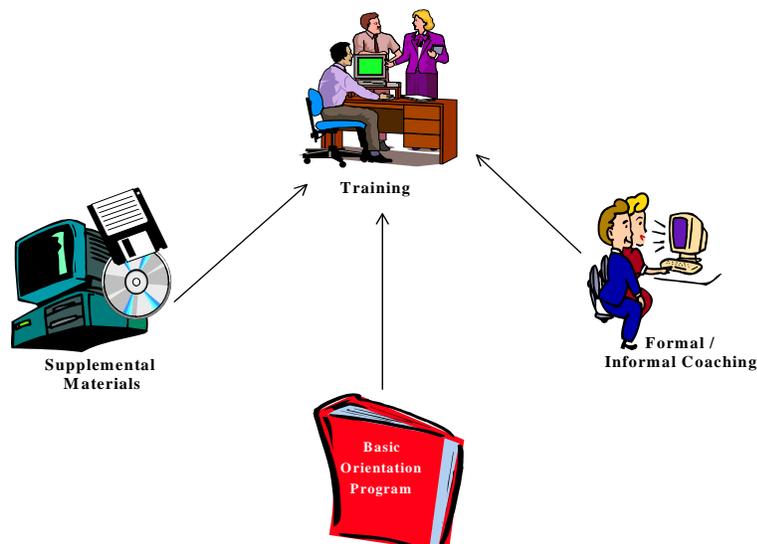


Figure 3.1 — Training Context³

The project team will develop a basic orientation program for new users. This orientation program will describe access procedures, discuss security precautions, provide an overview of organizational roles and responsibilities, and explain portal processes and tools.

The project team will also develop supplemental training materials tailored to the needs of FS and BLM organizations. The project team will work closely with those organizations to identify an appropriate training plan. Since FS and BLM organizational users are geographically distributed, training true novices could be a formidable task. However, the portal project team will develop training materials that are intuitive and, wherever possible, “stand alone.” The project team will also provide online tutorials for the tools, walking users through a tool and providing instructions on how to use those features.

Finally, the team will identify key users within each FS and BLM organization who can serve as coaches for both novice and more experienced users. This will be valuable both when a tool is launched as new employees join organizations that have already launched their own pilots.

3.3 Training Execution Plan

Once the basic training materials are developed, the joint KM portal project team will implement the training by leveraging existing FS and BLM processes and venues to the greatest extent possible. The project will work with individual FS and BLM organizations to determine the appropriate venue for early orientation sessions and what hands-on support is necessary.

- Training processes such as peer teaching may prove useful as the project grows beyond the ability to make direct contact with all users. However, many FS and BLM organizations will make all or part of their knowledge



environments available to a wider user audience outside of their own organization. In such a case, outside users may require additional training.

3.4 Evaluating Training Success

The joint KM portal project team will evaluate its training efforts to rate their effectiveness and to guide adjustments as appropriate. This evaluation will rely primarily on formal surveys. For formal presentations, the survey instrument will be provided at the end of each session. To elicit feedback as to the effectiveness of online tutorials, a feedback form will be included in the tutorial itself. Periodic surveys of those receiving formal or informal coaching will be used to gauge the effectiveness of this assistance.

3.5 Learning

We recognize that not every feature of the joint KM portal and its various tools can be covered in formal training sessions. Therefore the project team will work with the portal developer to provide online, just-in-time contextual learning for the portal. This will enable users to continually improve their efficiency and effectiveness through better use of the portal.



Appendix A – Acronyms

BLM	USDI Bureau of Land Management
CKO	Chief Knowledge Officer
COP	Community of practice
FAA	Federal Aviation Administration
FS	USDA Forest Service
IKM	Interagency Knowledge Management Team
JEAB	Joint Executive Advisory Board
KM	Knowledge management
SME	Subject matter experts
USDA	US Department of Agriculture
USDI	US Department of Interior

¹ Army Chief Information Officer, *Army Knowledge Management: A Strategic Plan for an Agile Force, version 2.1* (Washington, DC: US Army, August 2001)

² Adopted from *CIO Magazine*

³ Army Chief Information Officer, *Army Knowledge Management: A Strategic Plan for an Agile Force, version 2.1* (Washington, DC: US Army, August 2001)