Communications Plan Template

Plan communication messages and activities to reach key audiences



A communications plan is a document that outlines your intended communications approach and guides communication activities for a particular project or initiative. The communications plan addresses your goals and objectives related to communications, intended audiences, key messages, distribution channels and a plan of action for delivering messages to intended audiences through selected channels.

Communications planning helps ensure that key messages reach intended audiences. Communications activities help raise awareness, educate and/or train stakeholders, and allow for feedback. These strategies ultimately help facilitate the intended change.

## Instructions

1. Review and modify the template to suit your needs.
2. Draft the communications plan based on your identified stakeholders and communication approaches.
3. Share the plan for review and feedback and refine as needed.
4. Track communication activities, evaluate communication efforts, and refine communications messages and activities as needed.

## Helpful hints

* Refer to your **Stakeholder Analysis** (or complete a **Stakeholder Analysis**) to consider audiences for your communication activities.
* Discuss the communications questions in the **Migration Planning Questionnaire** as a team to inform development of the communications plan.
* Use the **Change Management Workbook** to map out communication activities, if the communications strategies required are more formal or structured.
* While this communication plan template is designed around an IIS platform migration project, it can be modified for application to other projects/initiatives.
* **Bolded text** (as used above) indicates that the resource referenced is available elsewhere in the IIS Migration Toolkit.
* Boxes marked “note to author” (indicated with a lightbulb icon) are intended to serve as guidance and offer prompts as you populate the template, and should be deleted before the document is finalized.

# <Jurisdiction> IIS Migration Communication Plan

### <Date>

### <Version>

# Document history

## Revision history

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Date** | **Version #** | **Author** | **Details of changes made** |
| 1 | <mm/dd/yy> | x.x | <Name> | First draft of the document |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |

## Reviewers

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| --- | --- | --- |
| **Name** | **Role** | **Department** |
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|  | **Note to author**: Consider the following roles for inclusion: Project manager, business analyst, public health advisor, program epidemiologist, technical lead, help desk staff, IT analyst. |

## Approvals

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Role** | **Signature** | **Version #** | **Date** |
|  | Immunization program manager |  | x.x | <mm/dd/yy> |
|  | IIS manager |  |  |  |

# Contents

[Instructions 1](#_Toc20497121)

[Helpful hints 1](#_Toc20497122)

[Document history 3](#_Toc20497124)

[Revision history 3](#_Toc20497125)

[Reviewers 3](#_Toc20497126)

[Approvals 3](#_Toc20497127)

[Contents 4](#_Toc20497128)

[Overview 5](#_Toc20497129)

[Project background 5](#_Toc20497130)

[Purpose of this document 5](#_Toc20497131)

[Intended audience 5](#_Toc20497132)

[Structure of plan 5](#_Toc20497133)

[Goals and objectives 7](#_Toc20497134)

[Goals 7](#_Toc20497135)

[Roles and responsibilities 8](#_Toc20497136)

[Strategies and key messages 8](#_Toc20497137)

[Key strategies 8](#_Toc20497138)

[Key messages 11](#_Toc20497139)

[Message channels 13](#_Toc20497140)

[Communication management 13](#_Toc20497141)

[Communication planning and tracking 13](#_Toc20497142)

[Communication schedule: year at a glance 20](#_Toc20497143)

[Change management 21](#_Toc20497144)

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|  | **Note to author**: After the communications plan is complete, update the table of contents above by right-clicking and selecting “update field.” |

# Overview

## Project background

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|  | **Note to author**: Provide a brief overview of the IIS migration effort necessitating the need for a communication plan. Refer to the **Project Charter** for a project description. |

## Purpose of this document

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|  | **Note to author**: For example, the purpose of the communication plan is to identify key stakeholder groups, messages, timelines and communication channels for the dissemination of essential information regarding the IIS migration activities. The plan: |
| * Identifies key stakeholders for consideration of content-specific messaging. (Refer to the **Stakeholder Analysis Worksheet**.) * Documents key messages and communication strategies, including various channels to effectively disseminate the information. * Documents message frequency, scheduling and tracking strategies. * Provides general change management concepts for addressing resistance to IIS migration among stakeholders. | |

## Intended audience

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|  | **Note to author**: For example, the intended audience for this training plan is the IIS migration project team and immunization program leadership so these individuals contribute to and approve of the communication plan as outlined. |

## Structure of plan

The communication plan is organized into sections that facilitate the development of a cohesive and comprehensive communication strategy and plan. The plan also includes several tools that can be utilized and modified as needed throughout the IIS migration process and/or post-migration.

### Figure 1: Organization of IIS migration communication plan



Information included in each section is as follows:

* **Objectives and goals** – Identifies the purpose of the communication plan and the timeframe for which it applies.
* **Audiences, strategies, key messages** – Identifies the audience, key communication strategies and messages.
* **Planning and tracking** – Management tools for planning and tracking communication activities.
* **Communication schedule: year at a glance** – A calendar for identification of activities over time.
* **Change management** – Provides change management strategies to address potential resistance.

# Goals and objectives

## Goals

The communication goals can be organized in three phases: short-term, intermediate-term and long-term. The intent of the communication plan activities through these time frames is as follows:

### Short-term (next 6 months)

* Goal 1
* Goal 2

### Intermediate-term (7-18 months)

* Goal 1
* Goal 2

### Long-term (19-36 months)

* Goal 1
* Goal 2

# Roles and responsibilities

The following individuals will be involved in communication activities.

|  |  |
| --- | --- |
| **Responsibility** | **Name(s), role** |
| Develop communication plan |  |
| Develop communication messages |  |
| Deliver communications |  |
| Monitor communication efforts |  |
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|  | **Note to author**: Consider: Immunization program manager, IIS manager, immunization field consultants/trainers, training supervisor/lead, communications lead, IIS help desk staff. |

# Strategies and key messages

## Key strategies

Communication strategies are assigned based on the stakeholders’ current awareness and the potential role they will play in the IIS migration. Sample strategies may be classified as follows:

### Raise awareness.

* 1. Ensure key stakeholders are aware of the need for change and the IIS migration effort.
  2. Ensure users/potential users are aware they must take IIS training prior to using the new system.

### Educate/train.

* 1. Educate stakeholders on new IIS functionality and timelines.
  2. Educate stakeholders on the benefits to be realized and adherence to national standards.
  3. Train users on the new IIS platform according to their role/functionality needs.

### Seek input.

* 1. Request feedback on training activities, implementation plan or other project components.
  2. Request specific feedback on functionality from field and training staff, pilot site users for HL7, pilot site users for VFC vaccine ordering and reconciliation via the new IIS.

### Update leadership.

* 1. Ensure appropriate leadership parties are kept up to date.
  2. Help support project approvals and funding requests.

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|  | **Note to author**: Consider these strategies and your identified stakeholders to indicate the strategies required to meet the needs of each group using the table below. While some will clearly require specific education and training activities, others will simply need awareness-building communication. |
| Collect feedback in order to modify or refine messages, training and IIS functionality. Stakeholders that serve in a leadership role or provide funding will require additional considerations and messaging. It is important to also be cognizant of groups that may attempt to hinder or undermine IIS migration messaging or the process at large, such as anti-vaccine groups. Consideration of groups that may be opposed to any enhancement of the statewide IIS database is critical in order to anticipate, prevent or mitigate disruptions to the IIS migration process. | |

### Table 1: Key stakeholders and strategies

|  |  |  |
| --- | --- | --- |
| **Category (examples)** | **Stakeholder group (examples)** | **Key strategy (examples)**  **-Raise awareness.**  **-Educate/train.**  **-Seek input.**  **-Update leadership.** |
| Advocacy organizations |  |  |
| Birthing hospitals | * Birth registrars * Maternity floor (nurse managers) |  |
| Childcare providers |  |  |
| Healthcare providers: IIS users | * Pediatric immunization providers (public and private) |  |
| Healthcare providers: IIS non-users | * Adult immunization providers (public and private) * Pharmacies * Non-immunizing healthcare providers |  |
| State agency, programs | * State immunization program staff * State technical staff * Health information technology (HIT) program management office (PMO) * State vital records * Surveillance programs * Women, Infants, and Children (WIC) program * Local WIC offices * State Health Improvement Plan (SHIP) * Department of Social Services (DSS) * Early childhood education (OEC) * State Department of Education * <Jurisdiction’s> legislators |  |
| State leadership |  |  |
| Electronic health record (EHR) vendors |  |  |
| Local health departments (LHDs)/districts |  |  |
| National partners | * American Immunization Registry Association (AIRA) * Centers for Disease Control and Prevention (CDC) |  |
| Other funding agencies |  |  |
| Parents |  |  |
| Schools | * School nurses |  |

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|  | **Note to author**: The information provided within the table below is provided as an example and should not be construed as a comprehensive list. Edit or customize the table and fields as needed. |

## Key messages

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| --- | --- |
|  | **Note to author**: Develop key messages to disseminate essential information about the IIS migration effort to the appropriate stakeholder groups. It is helpful to have a set of core messages that are repeated to all stakeholders and more tailored messages for specific audiences. Consider modifying your messages as |
| feedback is received throughout the migration process. While developing your tailored messages, consider the values, key barriers and priorities of the group you are attempting to reach, and shape your messaging to align with them. Communications targeting pediatric clinicians, for example, should have a different emphasis and core message than outreach intended for immunization program staff. | |

### Core messages

1. A new and improved immunization information system (IIS) is coming called <Name>! It’s not just <the old system name> anymore...
   1. We’re implementing a new, user-friendly IIS with many new features.
   2. The selected software has already been successfully implemented in <actual number of> states/territories.
2. <The new system> will continue to provide secure and easy access to official immunization records – for child care, camp, school and college.
3. Data confidentiality and privacy will continue to be safeguarded.
   1. We’re committed to maintaining a high level of security to safeguard data in accordance with state and federal standards.

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|  | **Note to author**: These are sample core messages that could apply to all stakeholder groups during an IIS migration effort and are provided for your reference. Modify as needed. |

### Tailored key messages

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|  | **Note to author**: The following table lists sample tailored key messages that may be more relevant to specific stakeholders. Modify as needed and use in conjunction with your core messages to tailor your communications. |

### Table 2: Tailored key messages

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| --- | --- |
| **Message category (examples)** | **Message** |
| <New IIS > Functionality | The functions you rely on are still here...plus a whole lot more! |
| Get accurate forecasting of due, overdue and invalid vaccines based on the latest ACIP recommendations. |
| Immunization data from multiple healthcare providers are consolidated in one patient record. Access the consolidated patient record online or via electronic query from your EHR for patient demographics, immunization history and forecasting. |
| Add vaccines administered in the patient record online or electronically (from your EHR). |
| Manage the entire vaccine program ordering process in <new IIS> (ordering, inventory, reporting doses administered, transfers, wastage). Check the status of your vaccine shipment online – especially during flu season! |
| Complete your annual VFC recertification online. |
| Run reports for your clinic including reminder/recall and immunization coverage assessments. |
| Generate immunization coverage rates for your jurisdiction. |
| Customer support | We’re committed to supporting you. |
| We’ll be making training available to help you navigate the new IIS. Plus, we’ll have help desk support available via <email/telephone/URL> <days/times>. |
| Customer support (cont’d) | Easy to use online help, videos and documentation are always available within the system. |
| Electronic data exchange | Does your practice use an electronic health record (EHR)? Establish electronic data exchange with <the new IIS>! |
| Save time and resources in meeting the immunization reporting requirements by establishing an interface for electronic reporting. No more printing, copying, faxing, mailing and playing phone tag! Enroll now at \_\_\_\_\_\_\_ |
| Improved data quality in <the new IIS> and your EHR (accuracy, completeness and timeliness). |

## Message channels

Key messages will be delivered through available or planned channels of communication that may include:

* Email/fax
* Fact sheet
* IIS message board
* Meeting
* Conference
* Newsletter
* Online training
* Onsite training
* Social media
* Video
* Webinar

# Communication management

The following tools are provided to manage the identification of key stakeholder groups, messages and forums and to ensure all audiences are engaged as needed.

## Communication planning and tracking

The communication planning and tracking table below provides a tool to plan and track stakeholder outreach activities. The tool should be used initially to specify the type of communication (i.e., message channel) to be used for each stakeholder group as well as a target date to initiate communication. As outreach or training occurs, staff should update the table to indicate the date completed and ensure all stakeholder groups are engaged as appropriate.

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|  | **Note to author**: The stakeholder groups indicated within the table on the following page are intended as a starting point and should be modified or tailored as needed. |

### Table 3: Communication planning and tracking

| **#** | **Stakeholder group** | **Message channel** | **Communication strategy** | **Message category (core, functionality, customer support, electronic exchange)** | **Date to initiate** | **Frequency** | **Owner** | **Date complete** | **Notes/ comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. | Adult immunization coalition |  | * Raise awareness. | * Core |  |  |  |  |  |
| 2. | Adult immunization providers (public and private) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 3. | American Immunization Registry Association (AIRA) |  | * Raise awareness. * Educate. * Seek input. * Update leadership. | * Core * TBD as needed |  |  |  |  |  |
| 4. | Birth registrars  maternity floor (nurse managers) |  | * Raise awareness. * Educate/train. * Seek input. | * Core * Functionality (selected) |  |  |  |  |  |
| 5. | Centers for Disease Control and Prevention (CDC) |  | * Raise awareness. * Educate. * Seek input. * Update leadership. | * Core * TBD as needed |  |  |  |  |  |
| 6. | Child care providers |  | * Raise awareness. | * Core |  |  |  |  |  |
| 7. | Vaccine Advisory Council (if applicable) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 8. | State chapter of the American Academy of Family Practitioners (AAFP) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 9. | State chapter of the American Academy of Pediatrics (AAP) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 10. | Department of Public Health executive leadership |  | * Raise awareness. * Educate. * Seek input. * Update leadership. | * Core * Functionality (selected) |  |  |  |  |  |
| 11. | Immunization program staff |  | * Raise awareness. * Educate/train. * Seek input. | * Core * Functionality * Customer support * Electronic exchange |  |  |  |  |  |
| 12. | Department of Public Health technical staff |  | * Raise awareness. * Educate/train. * Seek input. | * Core * Functionality * Customer support * Electronic exchange |  |  |  |  |  |
| 13. | State legislators |  | * Raise awareness. | * Core |  |  |  |  |  |
| 14. | State medical society |  | * Raise awareness. | * Core |  |  |  |  |  |
| 15. | Department of Social Services (DSS) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 16. | Department of Public Health surveillance programs |  | * Raise awareness. | * Core |  |  |  |  |  |
| 17. | State WIC program |  | * Raise awareness. | * Core |  |  |  |  |  |
| 18. | Electronic health record (EHR) vendors |  | * Raise awareness. * Educate/train. * Seek input | * Core * Electronic exchange |  |  |  |  |  |
| 19. | Field staff/trainers (if applicable) |  | * Raise awareness. * Educate. * Seek input. | All messages   * Core * Functionality * Customer support * Electronic exchange |  |  |  |  |  |
| 20. | Local WIC offices |  | * Raise awareness | * Core |  |  |  |  |  |
| 21. | Local health departments |  | * Raise awareness. * Educate. * Seek input. | * Core * Functionality * Customer support |  |  |  |  |  |
| 22. | Non-immunizing healthcare providers |  | * Raise awareness. | * Core |  |  |  |  |  |
| 23. | Office of Early Childhood (OEC) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 24. | Office of Healthcare Strategy (formerly HIT PMO) |  | * Raise awareness. * Educate. * Seek input. | * Core |  |  |  |  |  |
| 25. | Other funding agencies |  | * Raise awareness. * Educate. * Seek input. * Update leadership. | * Core * TBD as needed |  |  |  |  |  |
| 26. | Parents |  | * Raise awareness. | * Core |  |  |  |  |  |
| 27. | Pediatric immunization providers (public and private) |  | * Raise awareness. * Educate/train. * Seek input. | * Core * Functionality (selected) * Customer support * Electronic exchange |  |  |  |  |  |
| 28. | Pharmacies |  | * Raise awareness. | * Core |  |  |  |  |  |
| 29. | School nurses |  | * Raise awareness. * Educate/train. * Seek input. | * Core * Functionality (selected) |  |  |  |  |  |
| 30. | State Department of Education |  | * Raise awareness. | * Core |  |  |  |  |  |
| 31. | State Health Improvement Plan (SHIP) |  | * Raise awareness. | * Core |  |  |  |  |  |
| 32. | State Vital Records (DPH) |  | * Raise awareness. * Educate/train. * Seek input. | * Core |  |  |  |  |  |

# Communication schedule: year at a glance

The communication schedule depicts key communication activities planned for the calendar year. Included in the table are all existing and anticipated opportunities for implementing communication strategies and activities pertaining to the IIS migration.

### Table 4: Communication schedule

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication schedule: year at a glance 20XX** | | |  |  |  |  |  |
| **Month 20XX** | **Month 20XX** | **Month 20XX** | **Month 20XX** | **Month 20XX** | **Month 20XX** | **Month 20XX** | **Month 20XX** |
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|  | **Note to author**: Indicate existing and anticipated meetings and communication forums and events under the appropriate month. Update this table on a regular basis as the team identifies new communication forum opportunities. |

# Change management

While resistance is a normal reaction in times of change, good change management can mitigate the effects.

### Table 5: Strategies for addressing resistance to IIS migration

|  |  |  |
| --- | --- | --- |
| **Area of resistance** | **Rationale** | **Mitigation strategies** |
| Regulatory | State regulations may need to be revised to allow for electronic submission of IIS data to the new IIS. | Change in legislation |
| Knowledge/understanding | Don’t know how to enter online | Various training forums to reach all types of users |
| Don’t see the benefit of entering online | Testimonials from submitters as to actual benefits being realized |
| Increased workload for clinics | Too much time spent entering data compared to faxing immunization histories | Messages of electronic submission benefits – e.g., improved reporting, response time |
| No staff resources available to enter data into the IIS | Messages of time savings due to increased automation |
| Others (as identified by the jurisdiction) |  |  |

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|  | **Note to author**: The table above identifies potential areas of resistance during the IIS migration. This list is intended as a reference. Modify and/or expand as feedback is received and mitigation strategies are identified throughout the migration process. |

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