

## I. Background

This Communication Plan is designed as a component of and in support of the overall ReBAR Project Strategic Plan. It is a tool to help meet the defined goals and objectives within identified timelines.

## II. Overall Communication Goals

### a. Process

- i. **Provide consistent clear message(s)** about the goals and status of the project to those directly involved in and impacted by it.
- ii. Provide **accessible information** targeted to identified audiences.
- iii. Establish a method(s) for **building relationships and gathering input** important to the project implementation.

### b. Outcomes

- i. **Leaders and Stakeholders are prepared** for policy and funding decisions that will be a part of and result from this project
- ii. A **“ReBAR Road Map”** is evident and shows how the policy related to individualized budget and rate system transformation will be implemented.
- iii. **The credibility and understanding** of individual and system level funding decisions are enhanced.

## III. Key Messages

The overall goal is to identify messages that are consistent, relevant, and realistic. We want to choose specific words and phrases that share what we wish to say all the time to both internal and external audiences.

### a. Overall Strategic Plan messages (Goals) already identified in plan and web page are:

- i. Project is open to provide and receive input to make systems improvements
- ii. New system will meet crucial needs of individuals in exercising choice, Person Centered Planning (PCP) and Individual Budget Allocation (IBA)
- iii. New system will distribute resources equitably and fairly (based on rates linked to individual support needs)
- iv. New system will control costs within total funds and resources available
- v. New system will include quality management tools for the use of the IBA and Rate Setting process for State and key stakeholders

### b. Targeted Messages, specific to the phase of the project, **will** be articulated as these activities are designed and implemented.

#### IV. **Audiences**

A total of 49 internal and external audiences involved in, impacted by or important to the Project's success have been identified. Table 1 (pages 13-14) summarizes all identified audiences. The audiences can be broken down into 4 broad groups:

- a. **Internal Active** – project staff, contractors and members of the Stakeholder and Resource Teams participating in implementation of the strategic plan.
- b. **Internal Leadership** – the state staff, decision makers and elected officials who must become invested in and committed to this system transformation for it to become a reality
- c. **External -- Primary Impact Audience** – all counties, providers, consumers, and advocacy organizations who will be directly impacted by this system transformation during a) pilot test, b) field testing and c) roll out of the system transformation components
- d. **External General** – Audiences in DD system not directly impacted by the ReBAR project and the general public

#### V. **Possible Tools or Tactics for Communication**

Information transmittals (IM), Action Requests (AR) brochures, flyers, newsletters, periodic and annual reports, targeted information (example FAQ, success story or other) media press releases or special events, web site, blogs, direct mail, fax alerts, speakers bureau

#### VI. **Communication Plan**

This Plan is a “living document” (ever changing) that maintains a framework for input from each identified audience into Priority Goals, Specific Objectives/ Strategies, Major Action Steps/Tools, Timelines and Responsibilities and Evaluation Methods

**Broad Audience: 1.0 Internal Active**

ReBAR Staff and Contractors

Rates, IBA and QA Resource Teams and Steering Committee

DHS Sponsors/Decision-Makers

Major Goals: create a team mentality, trust, and credibility manage the message, keep project on task and on time, build enthusiasm and minimize resistance, cultivate and use Stakeholder Group as “ambassadors” to convey key messages.

Internal Active Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 2009 Activity
1.1 Establish and Implement <b>Regular Meeting and Reporting Process</b> with each targeted group	Meeting reminders, schedules and minutes  –Identify “parking lot” issues requiring clarification or resolution	Establish schedule and plan for sharing of information	<u>Monitoring schedule -Charity Sponsors/Decision-Makers</u> –Bob and Jan <u>Stakeholders Jan Rates Team</u> Jan/Molly <u>IBA Team Bob QA Team</u> Rosie	Semi-annual feedback from participants on effectiveness in September and April stakeholder meetings	Stakeholder meetings held - <b>9</b>  Resource Team Meetings - <b>8</b>  ( <b>5</b> as part of scheduled stakeholder meetings and <b>3</b> special meetings of the Rate Team for Survey design)	Restructured Stakeholder Meeting based on Phase II of Project, Using Ad Hoc groups around various rate models DD50. DD54 and DD 51
1.2 <b>Develop and use web page to</b> facilitate communication about project activity and accomplishments			Revision/Updates - Charity Review - Team	Semi annual count of web page hits	ReBAR page live - <b>November 2006</b> E-subscribers to web page - 123 self initiated and -115 Pilot sign ups. Total <b>238</b>	Use Feedback from all providers in pilot and DHS webmaster to improve communication

Internal Active Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 2009 Activity
1.2a develop and post basic information	Web page	As needed	Charity/ReBAR Team	e -subscribe sign ups	Hits on web page steadily growing- showing popularity and usefulness <u>Monthly Hits</u> 12/06 <b>426</b> 08/07 <b>1344</b>  <b>5</b> major postings or updates made between 2/07 and 8/23/07	700+ interested parties receive e mail of regular quarterly updates on web page
1.2b gather essential new material for posting	E-subscribe and ReBAR email	As needed	Develop-- <u>ReBAR Team</u> Post-- Charity	Tracking of major ReBAR updates posted (date, topic)		
1.2c. review material to be posted			ReBAR Team			
1.2d. Coordinated requests to DHS WEB and online change notices to identified parties			Jan/ReBAR Team  Charity			
1.3 Establish regularly scheduled communication and meetings between <b>ReBAR staff and contractors</b>	Phone contact or face-to-face meetings	Minimum monthly	Jan/Team	Semi-annual feedback from participants on effectiveness	Regular meetings were held with 3 primary contractors as needed through Phase I. Feedback (in process)	On-going

Internal Active Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 2009 Activity
<p>1.4 Identify <b>communication messages and information</b> related to</p> <hr/> <ul style="list-style-type: none"> <li>• Pilot SIS</li> <hr/> <li>• Provider Cost Survey (PCS)</li> <hr/> <li>• Individual Service Survey (ISS)</li> </ul>	<p>SIS FAQ</p> <hr/> <p>Pilot Test Design</p> <hr/> <p>Rates Next Steps</p> <hr/> <p>Model for letters to stakeholder groups involved in Pilot and cost study</p>	<p>Initial - 3/07 Updates as needed</p> <hr/> <p>03/07</p> <hr/> <p>03/07</p> <hr/> <p>03/07 4/15/07</p>	<p>Rosie</p> <hr/> <p>Team /Consultants</p> <hr/> <p>Team /Consultants</p> <hr/> <p>Team /Consultants</p>	<p>Stakeholder review and input regarding information provided to 11 counties and 76 providers.</p> <hr/>	<p><b>Pilot County Orientation</b> Held 5/3/07 with 15 participants representing pilot counties. <b>Three Provider Call Ins</b> oriented 42 representatives from 30 agencies.</p> <hr/> <p>Survey Tools and SIS FAQ posted <b>7/24/07</b></p> <p><b>HSRI Survey Tool Orientation</b> held by teleconference July 11, 2007 in 3 sites with 75 participants</p> <p>County, provider and other feedback surveys (in process) 9/07</p>	<p>Establish 2008 Messages by January 2008 based upon:</p> <ul style="list-style-type: none"> <li>-strategic plan activities</li> <li>- Results from Pilot and subsequent model</li> </ul> <hr/> <p>Messages focus on</p> <ul style="list-style-type: none"> <li>-Design of Rate Models</li> <li>-Reporting of Assessment Results</li> </ul> <p>Done via web page “Quick Links” and quarterly communication</p>

**Broad Audience: 2.0 Internal Leadership**

ReBAR Sponsors/Decision-Makers

Reps of ODDS Major Units

DHS Units: Accounting, Rate Setting and Budget

PRIMARY Targeted ODDS Projects: System Re-Engineering, MMIS, ISP, SELN

PRIMARY Targeted ODDS Units: Waiver, QA, Contracts, Budget, Kids Residential

Governor’s Office and Legislature

Major Goals: Build and strengthen essential relationships, assure timely information sharing and essential decision making, keep the project on task and on time, create credibility and trust, build enthusiasm and minimize resistance, cultivate and use Stakeholder Group as “ambassadors” to convey key messages.

Internal Leadership Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	Activities 2008 and 2009
2.1 <b>ReBAR Sponsors/Decision-Makers</b> conduct time-sensitive meetings to monitor progress and make essential policy decisions	Status Reports  Review “Parking Lot” Policy Issues	As needed  As needed	Bob and Jan  Bob and Jan	# Participants and # timely decisions secured	17 meetings with Sponsors Group or DHS leadership	Continue
2.2 <b>Governors Office and Legislature</b> provided regular ReBAR Update	Meetings and/or Special Reports	At minimum, dates in Strategic Plan	Bob, Jan, Mary Lee and James	Submission and response to reports	ReBAR material prepared for integration into SPD legislative presentations and budget packages	Continue based on strategic plan dates
2.3 <b>DD MMIS Large Group</b>	ReBAR Participation	Weekly	Jan	Quarterly Team review of	DD MMIS on hold due to overall delay	Unknown

Internal Leadership Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	Activities 2008 and 2009
2.3a. <b>DD MMIS Workgroups</b>	ReBAR Participation	Bi-Weekly or as convened	Jan, Molly, Rosie, Joe	effectiveness of involvement -System 'understanding of REBAR needs	of DD integration	
2.3b. <b>System Re-Engineering</b>	Meetings	Bi-monthly or as scheduled	Bob and Jan	-ReBAR needs reflected in policy and procedural decisions	Postponed	ReBAR part of overall planning on regions, capacity building, etc.
2.3c. <b>ISP new group</b> developed to identify changes in process that will be needed to integrate SIS and IBA into the person centered planning process	Meetings	As scheduled or needed by ReBAR Staff (projected initiation August 07)	Rosie		No Activity postponed until Phase II	Specific activities to be determined with SPD and Stakeholders
2.3d. <b>Quality Assurance Planning for Goals 1 and 2</b>	Meetings with QA Waiver Unit and Stakeholders	As scheduled	Rosie	Review of plan developed	ReBAR staff in initial meeting. Activity postponed	QA activities starting 10/07
2.3e. <b>SELN</b> 13 state initiative supported employment. –will assist in reviewing rates and incentives with ReBAR	Conference Calls, Plans, Reports	As scheduled monthly	Bob and Molly	Semi-annual review of the value of available national information to ReBAR	Staff reviewing information on incentive models	HSRI and Rates Team will review information and options, models and make recommendations to SPD

Internal Leadership Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	Activities 2008 and 2009
2.3f. <b>ODDS Weekly Staff Meeting</b>	Meetings / Presentations	Weekly on 3 Mondays of Month	Jan/ReBAR Team	ReBAR staff verbal reports on status and progress and ODDS staff questions are addressed and discussed.	Ongoing	Ongoing
2.4. ReBAR identifies and uses <b>stakeholder communication tools</b> to report progress and gather input	Targeted co-authored messages or articles	Minimum 2 times <i>year</i> and pre/post Pilot Test, Cost Study and Field testings	ReBAR staff with Project Workgroup Representatives	Annual review of feedback from planned messages	Co-authorship not addressed – did some co-presenting at ORA with Stakeholder Rep	Revise goal to reflect “identifying 1-2 possible opportunities
2.5 Use DHS Communication Staff to assist with development of information at ReBAR milestone points	Press releases	As identified in Strategic Plan	Molly/ReBAR Team	Annual review of value/effectiveness of information distributed	No press releases targeted	To Be Determined

## 2007 ReBAR Communication Plan

**Broad Audience: 3.0 External Primary Impact Audience**

PRIMARY State/ Community Partners: DD Coalition, DD Managers, Governor’s Office, Legislative leadership, Project Stakeholder Group

County: Directors, DD Program Managers, Services Coordinators, and Financial Managers

Provider: Program Directors, Trade Associations

Advocacy Organizations: OAC, University Centers of Excellence, State and Local DD Councils, ARCs, SAAL, People First

**Major Goals:** maintain working partnerships, assure timely information sharing keep the project on task and on time, gather essential feedback in pilot test, cost study, and field testings to shape project decisions, maintain credibility, build enthusiasm and trust, minimize resistance

External Primary Audience  Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 and 2009 Activities
3.1 ReBAR staff/leaders establish regular agenda and reports to identified <b>Stakeholder Groups</b>	Meetings, minutes, mailings,	Monthly and as identified in Strategic Plan	Bob, Jan, ReBAR Team	Issues raised and questions presented and answered or placed in the parking lot for further consideration  Issues raised and questions asked and answered or carried to leadership for	Regular project updates were provided	On-going-would like to see stakeholders play a more active role in the process (see related item 2.4)
3.1a. County MH Directors	Meetings/Transmittals	Bi-monthly Monthly and Transmittals as needed	Mary Lee		2 presentations to MH Directors Group	
3.1b. County DD Managers	Meetings ODDS Transmittals	Monthly	Mary Lee/Bob/Jan		13 regular and special meetings with DD Managers	
3.1c. Providers/Trade Associations (ORA, CPAO)	Associations Meetings	Quarterly	Bob/Jan		5 discussions with Trade Assoc. members (1 CPAO, 4 ORA)	

3.1d. County CMS/Services Coordinators	Conferences	Annually	Bob/Jan	further discussion.	Postponed to Phase II	
3.1e. Centers for Medicare and Medicaid (CMS)	Teleconferences and reports  System Transformation Grantee Conference	Quarterly  Annual	Bob/Jan University of Oregon, and others	Use evaluation form and gather feedback rating for any major presentation.	<b>7</b> teleconferences <b>1</b> on-line semi- annual report, and <b>1</b> site visit <b>Total 9</b>	
3.2 Develop specific communication strategy related to project phases, survey tools, and participants designed to: • Inform participants Fit into broader activities or responsibilities for stakeholders	Transmittals Brochure Special Local /Regional Meetings	As identified in Strategic Plan or specifically designed	ReBAR Team Consultants and AAIDD		<b>4 Project Transmittals</b> to all impacted audiences	To be determined for planning and implementation of Phase II.

**Broad Audience: 4.0 External General**

DD Projects Not Directly Impacted: Brokerages, Technology and Housing and Family to Family Systems Transformation projects

Targeted Secondary Audiences (not primary responsibility of SPD): provider boards and staff, individual consumers, families and legal guardians

Broad Audiences: media, State and County elected officials, voters, general public,

Major Goals: provide information on project milestones designed to increase awareness and understanding, build support and minimize resistance to the project.

External General Audience Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 and 2009 Activities
4.1. Further specify Targeted Secondary Audiences	Review with stakeholders	Project milestones- initially following Pilot	ReBAR staff with Resource Team reps	Annual review of feedback from planned messages	Table 1 (pages 13-14) was updated 9/5/07	
4.2. ReBAR identifies and uses <b>stakeholder communication tools</b> to report progress and gather input	IMs and Targeted co- authored messages or articles	Minimum 2 times year at milestone points	ReBAR Staff Stakeholder Leaders	Specific activity review	See 3.1c (page 9)	

External General Audience Objectives or Strategies	Action Steps/Tactics	Timeline Frequency	Responsible Party	Evaluation	2007 Report 7/06-8/07	2008 and 2009 Projected Activities
<p><b>Broad Audiences</b></p> <p>4.3. Use DHS Communication Staff to assist with development of information at ReBAR milestone points</p>	Press releases	As identified in Strategic Plan	Molly/ReBAR Team	Annual review of feedback from planned messages	Table 1 (pages 13-14) was updated 9/5/07	
4.4. Use stakeholders to develop and share local information about ReBAR at milestone points	Local news stories	<b>As appropriate</b>	ReBAR Team and Stakeholder group	Specific Activity Review	See 3.1c (page 9)	Targeted strategies will be developed in early 2008 following identification of Phase II activities and/or model development

Audience	Method of Communication						Frequency				
	Partner	Web	E mail	Survey	Focus Group	Feature Story or Presentation	Week	Month	Quarter	Annual	As Needed
<b>Stakeholder Group</b>	x	x	x			x		x	x		x
<b>Contractors</b>	x	x	x			x		x			x
<b>DHS</b>											
Director's Office and Cabinet		x	x			x					x
Accounting Unit		x	x			x					x
Rate-Setting Unit		x	x			x					x
Budget Unit		x	x			x					x
DHS/VR Competitive Employment Project	x	x	x			x		x			
<b>SPD</b>											
Leadership			x			x		x			x
Quality Assurance		x	x			x			x		
Medicaid Management Information System (MMIS) Project	x	x	x			x		x			
Money Follows Person Project		x	x			x					x
Technology and Housing		x	x			x					x
Individual Support Plan (ISP) Revision Workgroup	x	x	x			x					x
Supported Employment Leadership Network	x	x	x			x		x			
Licensing Unit		x	x			x					x

Audience	Method of Communication						Frequency				
	Partner	Web	E mail	Survey	Group Focus Gr	Feature Story or Presentation	Week	Month	Quarter	Annual	As Needed
DD Waiver Unit	x	x	x			x					x
DD Contracts Unit		x	x			x					x
DD Budget Development Unit	x	x	x			x					x
DD Children's Residential Unit	x	x	x			x					x
CDDP Financial Managers		x				x					x
<b>Providers</b>											
Residential/Employment Directors	x	x	x			x			x		
Trade Associations		x	x			x			x		x
<b>Consumers</b>											
Individual Self Advocates		x			x	x					
Relatives, Families and Legal Guardians		x			x	x					
SAAL		x				x					
People First		x				x					
<b>Advocacy Organizations</b>											
DD Coalition		x				x					x
The ARCs		x				x				x	
State DD Council		x				x					x
Oregon Advocacy Center		x				x					x
Centers of Excellence (UAP)		x				x					
Brokerages		x				x					x
Broad Disability Community		x				x					
Voters		x				x					
General Public		x				x					