

Project Information	
Project Name	BNF Letter Writing Rewrite for V3 Communications Preparation
Date	09/24/2009
Business Unit / Fund	Communications/All Funds
Project Initiator	Andrea Kalwei
Executive Sponsor	Len Beauchamp
Type of Project	<input type="checkbox"/> New Initiative <input checked="" type="checkbox"/> Major Enhancement/upgrade <input type="checkbox"/> Compliance <input type="checkbox"/> Process Improvement <input type="checkbox"/> Other_____
Project Prioritization Criteria	<input checked="" type="checkbox"/> Related to Strategic Plan <input type="checkbox"/> Resource Allocation (workload, training, right people in right job, BU) <input type="checkbox"/> Avoid underpayments/overpayments on Annuity and Pension <input type="checkbox"/> Compliance with plan document and/or the law... <input type="checkbox"/> Achieve Operational Efficiencies
Project Description	
<p>Overall Objective: To rewrite the current communications housed in Letter Writing to produce concise, easy-to-understand, professional looking and competitive communications for our external audiences (participants, employers, providers, IBB, Business Managers) before they are entered into the new BAS. The Communications Assistant will be the lead for this project.</p> <p>Specific steps include:</p> <ol style="list-style-type: none"> 1. Obtain a complete list of all BNF letters produced by the Letter Writing system from all departments and ClaimFacts letters from Health and Welfare. 2. Train Communications Assistant on the specifics of how the letters are to be rewritten. 3. Review all current letters produced by the Letter Writing system. Preliminary numbers from impacted departments: <i>(Chart on next page)</i> 	

	Estimated Total Letters	Estimated Letters Used Regularly
Annuity	300	150
Employer Contributions	140	35
Health & Welfare	400	200
Pension	506	242
Total	1,346	<u>627</u>

4. Meet with the SME for each department (EC, PEN, HW, ANU - in conjunction with the BAS timeline) to determine which letters can be eliminated or combined.
5. Condense, rewrite and reformat all remaining letters prior to implementing the Vitech communication solution.
6. Work with IT on printer capabilities to enable upper and lower case printing and updated formatting specifications on all letters.

Business Need / Problem

The Letter Writing system currently in use is outdated and produces communications that do not project a professional, competitive image for the Fund Office. There are both systems limitation and content problems with the current Letter Writing system. *Examples and additional supporting resource materials, indicated by the parentheses and a corresponding exhibit letter, are provided in the provided appendix for review at your convenience.*

System Limitations (Hardware/Software) Problems (most of which are addressed by the new BAS):

- The letters are formatted to be printed on the old watermark letterhead (**A1, A2, A3**). Our updated contemporary letterhead (**B1 – B4**) does not work within the Letter Writing constraints, so the old letterhead must be used for these letters creating inconsistent branding for the Funds. The new letterhead is used for all mass mailings.
- The letters produced from Letter Writing are produced with a courier-type font as if they have been created on a typewriter. (**C**) This gives our audiences the impression the Fund Office has not kept up with the times and is behind in technology.
- Many letters produced by Letter Writing are required to be printed on the mainframe printers overnight in batches. Because of the time it takes these older printers to print in both upper- and lowercase, these batched letters go out in all caps, which is the equivalent of shouting at the reader (**D,E**). This projects a very unprofessional, unfriendly, and non-competitive image for the Fund.
- Each Letter Writing letter needs to be evaluated from the Audience, Objective, Approach communications perspective (**F1, F2**). The Letter Writing paragraph sharing function does not allow you to treat each letter as its own entity because paragraphs are shared across many letters and changes

aimed towards specific audiences are difficult and time-consuming, making the re-write objectives unattainable within the Letter Writing system.

Content Problems (not addressed by the new BAS):

- The Letter Writing letters are formatted with the closing justified on the right-hand side, and many of the closing phrases are antiquated such as “Very truly yours”, “I remain”, “Kind regards”, “This will acknowledge your”, etc. This needs to be updated (**C, G, H**).
- Many of the Letter Writing letters are formal and wordy. Contemporary communications standards have evolved to promote clear, concise, conversational style letters that avoid big words and long phrases, and are presented in the active voice, which is more clear and conversational (**I1 – I5**).
- Many of the Letter Writing letters are written at a grade level that is too high for our general audience. The average adult reading level in the United States is 8th – 9th grade (*Adult Literacy in America (NALS) National Center for Education Statistics, U.S. Dept of Education, Office of Educational Research and Improvement (NCES 1993-275), April 2002*). We need to improve the reading level of our letters.

The current BAS project offers an opportunity to take the initiative toward rewriting and reformatting all BNF letters currently in Letter Writing in a style and manner that would be in line with our strategic goals.

Solution

The recommended solution is for Communications to rewrite all letters in use. The Communications Assistant will take on the Letter Writing Rewrite project in addition to other responsibilities for the position. *See exhibit K, the job description, and exhibit L, the position approval e-mail, in the appendix.*

The end result is expected to be quality communications in the new BAS system and a Communications Assistant that we can leverage in many other areas of communications at the Fund Office.

Project Timeline And Resource Plan

Estimated Start Date December 1, 2009

Estimated End Date Timeline to run parallel with the BAS department schedule – EC, PEN, HW, ANU

Estimated Resources needed: (Percentage allocation based on a 40 hour week)

- Communications Assistant at 75%
- Communications Manager initially at 75% reduced to 25% after the project plan is in place and a Project Manager is assigned
- Project Manager from the PMO at 25% to keep the project on track with the BAS project
- Department SME's to identify letters, provide input on condensing and combining existing letters and to provide training on the Letter Writing System at 25%
- Compliance assistance at 25%
- Vitech personnel to provide guidance in the design solution for the production of BNF Communications
- Vitech personnel to provide education and training for use of the BNF Communications solution

Consistency/Fit with BNF's Mission

Describe how the project is consistent with the Fund's mission and or strategic plan. Provide rationale if it is not.

This project touches on three Strategic Plan goals:

- **Become a more competitive organization** – To ensure the success of the BAS, we need to update the look and feel of Letter Writing communications to stay competitive with other benefit organizations. The current look of our Letter Writing output is not up to current communication standards.
- **Deliver timely, accurate and consistent member services** – Our mass communications have been reformatted with updated letterhead and style guidelines that are consistent with our overall branding across the organization including www.bnf-kc.com. The Letter Writing letters cannot be updated due to the restrictions of the Letter Writing system, producing inconsistent branding across all communications.
- **Meet the needs of Participants, Union Officials/Business Managers and Employers** – We can improve and update our communications to more effectively communication with all audiences.(I1 – I5)
- **Acquire newer and integrated technologies to streamline and support administrative processes** – Our current mainframe printing capabilities limit the professional production of many Letter Writing letters, as exemplified by the letters produced in all caps. To streamline and produce consistent branding, this printing capability needs to be addressed. IT is working on this.

Cost Benefit Analysis

Estimated Project Costs:

Project Costs	During Project	After Project
Internal resources (# FTEs x standard cost)	75% Communication Asst. 50% Communication Mgr. 25% PMO 25% SME 25% Compliance = 2 FTEs	25% Communications Asst. 15% SME 10% Compliance = .50 FTEs
Hardware/Software Costs	Covered under BAS	Covered under BAS
Consulting costs	None anticipated	None anticipated
Communication costs	None anticipated	None anticipated
Vendor costs	Covered under BAS	Covered under BAS
Mailing costs	None	None
Printing costs	None	None
Other project cost	None	None

Anticipated Benefits

- Opportunity to help meet four of our strategic goals. *See Consistency/BNF Mission Section.*
- Improved communication with our audience which could reduce participant confusion and phone calls to the Fund Office and increase participant satisfaction.
- Providing a tangible result for our participant/audiences from the implementation of the BAS.
- Ability for Communications Manager to spend more time on other projects and big picture items such as keeping Web site content fresh, managing the Communications Queue, and launching new communication initiatives. *Outlined in more detail in the 2010 Communications Plan.*

Risk/Impact Analysis

Risk	Risk Probability L=low, M=medium, H=high	Risk Impact L=low, M=medium, H=high	Risk Mitigation Plan
Not hiring the right person for the Communications	Low	High	Communications Manager to work closely with HR and be involved in the hiring and qualification process. Update Job Doc for

Assistant position in a timely manner.			position if needed. Work with HR to start recruiting and interviewing as soon as possible.
Resource time constraints on meetings with SMEs to obtain, eliminate or condense Letter Writing letter lists	Medium	Medium	Schedule time for meetings as far in advance as possible to accommodate SMEs.
Timely turn-around on letter review process (SME, Communications, Compliance)	Medium	Medium	Create an abbreviated communication routing procedure specific to this project.
Resistance to change	High	Medium	Ask for the support of executive sponsor when necessary. Hire a candidate that has the people skills to mitigate the fear and resistance to change among some Fund employees.
Changes submitted after approval process has been completed	High	High	Enlist executive support that unless it is an erroneous change (incorrect information, gross grammatical error) that distribution will not be halted. Make it clear in the abbreviated communication routing procedure for this project that any changes need to be made during the reviewers review period only.
Lack of understanding of contemporary communication methods	High	Medium	Communications Manager to produce and post communication education materials on the BoilerNET including information on clear communications and an approved Style Guide.
Unanticipated projects to monopolize time	High	High	For example Health Care Reform or Pension Funding issues. Have Executive Sponsor consider adding additional Communication resources as needed.

Alternatives

Description of Alternative:

Contract with Dobies or other outside firm to rewrite the letters. **(M, N)**

Cost and Benefit Summary of Alternative:

	Contractor Dobies	BNF Communications Assistant
Specifications	2006/2007 contract information for Dobies copywriting services	Salary information pulled from PayScale based on the following specifics: <ul style="list-style-type: none"> ▪ Career experience: 2 years ▪ Location : Kansas City, KS ▪ Education: Bachelors of Science degree in Communications ▪ Employer Type: Foundation/Trust
Assumed Total Project Time Commitment	52 weeks	52 weeks
Hourly Rate	\$90.00 (M)	\$15.34 (median range yearly salary is \$31,912) (N)
Weekly Time Allocation for Project	75% = 30 hours per week	75% = 30 hours per week
Total Weekly Cost	\$ 2,700.00	\$460.02
Total Cost of Assumed Project Time Commitment	\$140,400.00	\$23,921.04
Benefit to Fund beyond 52 weeks	None	<ul style="list-style-type: none"> ▪ Ongoing assistance for Communications Manager with other external communication projects ▪ Ongoing assistance to HR with internal communication needs ▪ Ongoing assistance to IT as a BoilerNET moderator

One year of using Dobies consulting at \$140,400.00 is equal to 4.4 years of salary at the median range (\$31,912) for a Communications Assistant. In short, the cost for one year of consulting for Dobies is equivalent to approximately a little over four years of employment for a Communications Assistant.