SWEETWATER AUTHORITY

STRATEGIC COMMUNICATIONS MASTER PLAN

2019-2024

RAFTELIS

SVPR
COMMUNICATIONS

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2019-2020 Outline

Appendix A: Communications Review and Brand Assessment

Introduction

In 2019, Sweetwater Authority (the Authority) initiated a process to create a 5-year Strategic Communications Master Plan (plan) to drive progress toward the organization's most important communication and outreach goals. This effort was built on a foundation of communication program growth within the Authority's Public Affairs Section and a need to align the Authority's communications goals with its 2017 Strategic Plan.

The Authority's Public Affairs Section sought input from the Board of Directors, executive leadership, employees, customers, and other external stakeholders. The strategic framework presented in this plan will help guide communications decision-making for the next five years (2019 – 2024).

Plan Development

Sweetwater Authority designed its communication planning process to:

- ***Assess the effectiveness of the Authority's current communication program***

- ***Solicit opinions and perceptions of stakeholders who represent external and internal audiences***

- ***Discover communication and service gaps***

- ***Recommend strategies to enhance communication with key audiences***

Communication Planning Tasks

Project Kick-off Workshop

To review the components of the plan and initiate input from employees and executive leadership.

Stakeholder Interviews

To inform the development of a defined brand, the vision of what the Authority is, and how the Authority will communicate this vision.

Communications Material Review

To determine what is working and what should be enhanced related to online and print materials.

Strategy Workshop

To get input on the actions that the Authority can take in its communications strategies.

Situational Analysis

Sweetwater Authority is a publicly-owned water agency governed by a 7-member Board of Directors. The Authority was established in 1977 as a joint powers authority of the South Bay Irrigation District and the City of National City. The Authority has 130 employees that are from diverse backgrounds and represent a variety of professions.

Sweetwater Authority serves a population of 190,000 in a 36 square-mile service area that includes National City, Bonita, and the western and central portions of Chula Vista. The Authority manages several important environmental assets along the 230-mile Sweetwater River Watershed, including Loveland Reservoir and Sweetwater Reservoir. Together, both reservoirs hold 17 billion gallons of water, are home to several protected species, and provide fishing, hiking and recreational activities to residents. The reservoirs are part of the Authority's diverse water resource portfolio that includes groundwater from the National City Wells, the Reynolds Groundwater Desalination Facility, and water treatment facilities. Sweetwater Authority is unique in the region in that 70 percent of its water is from local sources.

Sweetwater Authority has grown its communications program steadily. Today, the program is staffed by three full-time public relations practitioners who are significantly engaged with the community. This team leads an impactful youth education program and is growing the agency's social media presence steadily each year.

Communications strategies provide focus and consistency over time. There are many contemporaneous factors that can pull the Authority away from communicating its designated brand and values. The state and local policy and political environment, regular changes in elected leadership, and the media environment can affect the Authority's focus on organizational goals. This plan is intended to provide consistency in communications and to support the Authority's brand for a period of five years. The Authority thoroughly assessed its communications environment and sought out input from key community influencers to inform a larger, long-term communications approach.

Current Environment

This Strategic Communications Master Plan addresses Sweetwater Authority's interest in taking a comprehensive look into its current communications program to assess opportunities to build the Authority's brand reputation among its stakeholders and what steps, strategies, and communication techniques should be employed to capture those opportunities. This plan aligns the agency's internal and external communications with the vision and goals developed in the Authority's 2017 Strategic Plan.

In developing its Strategic Communications Master Plan, Sweetwater Authority has incorporated several customer, community, and stakeholder-based issues.

A highly diverse service area is an asset

In nearly every context, the community make-up of Sweetwater Authority's service area is diverse. In terms of median household income (MHI), for example, Bonita is the most affluent of the three communities served by the Authority and also has the highest water bills, primarily due to single-family residences with larger lots. National City has the least affluent customers, where MHI is 34 percent below the state MHI, and more than 20 percent of residents live below the federal poverty level. Many of the Authority's customers are bilingual, and the level of education also varies widely from community to community.

Targeting audiences and ensuring that communications are relevant and culturally appropriate is a focus of this plan. It is an area of opportunity for the Authority to demonstrate leadership through its communications channels and tactics as it serves its diverse stakeholders.

Customers unsure on value of service provided

Sweetwater Authority last conducted a customer survey in 2015. While the survey results are a bit dated, there were some important indicators from the survey that were factored into the development of this plan.

In the survey, Authority customers solidly agreed that the cost of water was a strong incentive to conserve. However, there was significant disagreement on whether customers received good value for money spent on water.

Of special note, residents of the Authority's service area are heavy bottled water consumers at home. Nearly one-half of respondents primarily consumed bottled water, compared to one-third who prefer drinking water straight from the tap. This preference for bottled water could be rooted in customer skepticism of the quality and value of tap water. If consumers are unwilling to trust tap water for drinking and cooking, instead relying on comparatively expensive bottled water, then they may be undervaluing the water service the Authority provides.

Emphasizing the quality and value of tap water is directly linked to customers' perception of the service provided by the Authority. Promoting tap water in turn promotes the Authority's value.

Water, drought, and conservation

Drought and the need to use water efficiently have been staples of communication for Sweetwater Authority. Current communication messaging and programs have a strong water efficiency ethic theme. A review of Authority communications materials suggest that, in some ways, water efficiency may have become the Authority's brand.

Given the Authority's interest in being perceived by stakeholders as a steward of Sweetwater's environmental assets there is an opportunity to broaden the messaging around water efficiency to incorporate additional sustainability and water resource protection elements.

Communications Review and Assessment

A thorough review of communications material and a brand assessment were conducted in 2019. The full report from this effort is included in Appendix A.

Strengths

Relationships: Sweetwater Authority has made significant progress in building and maintaining relationships with a diverse range of stakeholders.

Broad-based communication toolbox: Nearly every communication tactic and tool available to public agencies are used by Sweetwater Authority.

Proactive customer messaging: Customer service is a core tenant of messaging and a value employees embrace.

Credibility: Stakeholders and customers report that Sweetwater Authority is a credible source of information, and employees look to managers for growth and development.

Pride: Employees express pride in their service to the community.

Presence in the community: Sweetwater Authority prioritizes being present in the community, from booths at events, to signage, to availability for walk-in payments.

Focus Areas

Consistency: Printed and online materials lack consistency in design and use of logo, color, fonts, etc., making it harder to build understanding with customers, stakeholders and employees.

Consolidation: A greater emphasis on online communication and merging printed materials may make communicating more efficient.

Evaluation: Goals and metrics could be enhanced to provide value and allow for regular review of efforts to determine effectiveness.

Cultural Appropriateness: Sweetwater Authority translates materials and connects to culturally diverse audiences, but improvements could be made.

Visual Interest: Materials lack visual interest and regularly do not demonstrate a connection to people, both customers and employees.

People as an Asset: Employees' connection to customers is a communication opportunity that could be emphasized.

Audiences

Audiences are individuals, groups, organizations or governmental entities that have an interest in Sweetwater Authority. Audiences may be directly or indirectly affected by the outcome of a decision related to the Authority. This list is comprehensive but will evolve over time.

Government and Elected

- City of Chula Vista and Council
- City of National City and Council
- Office of County Supervisor
- San Diego District Attorney
- StephanCare Community Center
- Office of State Senator
- Office of Assembly Member
- Office of U.S. Congressman
- San Diego Association of Governments

Civic and Service Organizations

- South Bay Community Services
- San Diego Workforce Partnership
- Sweetwater Valley Civic Association
- Third Avenue Village Association
- National City Firefighters Association
- National City Police Officers Association
- MANA de San Diego
- Albondigas South County
- Volunteers of America – Renaissance Center
- Alliance of Californians for Community Empowerment
- Bonita Optimists
- Chula Vista Kiwanis
- Chula Vista Rotary Club
- Chula Vista Sunrise Rotary Club
- Kiwanis Club of Bonita
- National City Rotary
- Chula Vista Charitable Foundation

Water Industry

- San Diego County Water Authority
- Otay Water District
- City of San Diego Public Utilities
- Industry Associations

Regulators

- California State Water Resources Control Board
- Division of Drinking Water

Youth

- Chula Vista Elementary School District
- National School District
- Sweetwater Union High School District
- Boys and Girls Clubs – Bob Payne branch
- Child Development Associates – Parks Child Development Center
- The SUHI Foundation

Business Customers

- Building Industry Association
- California Apartment Association – San Diego
- Chula Vista Chamber of Commerce
- National City Chamber of Commerce
- Pacific Southwest Association of Realtors
- Unified Port of San Diego
- U.S. Navy Region Southwest – Naval Base SD
- Asian Business Association of San Diego County
- South County Economic Development Council
- Mile of Cars Association
- San Diego Regional Chamber of Commerce
- Private Developers

Environmental and Stewardship

- Olivewood Gardens and Learning Center
- Ocean Connectors
- Living Coast Discovery Center
- The Water Conservation Garden

Residential Customers

- Community Housing Works – Paradise Creek
- Operation Samahan
- Kimball Seniors Center – City of National City
- San Diego County Building Trades Council
- SD County DA - CARE Community Center

Media

- San Diego Union-Tribune
- Voice of San Diego
- Star News
- La Prensa
- The Filipino Press
- TV Stations
- Trade Media

Cultural

- Mabuhay Foundation
- The Lumpia Club
- A Reason to Survive (ARTS)
- 4 Walls International
- Mariachi Scholarship Foundation
- La Vista Memorial Park Foundation
- YMCA National City Aquatics Center

Internal

- Board of Directors
- Employees
- Executive Leadership

Goals and Vision of Success

Sweetwater Authority's communication goals represent the most vital issues that the Public Affairs Section should focus on to achieve its vision of success. These goals were identified through engagement with Sweetwater Authority's Board of Directors, executive leadership, employees, stakeholders, and customers in consideration of the Authority's 2017 Strategic Plan. The goals are what the Public Affairs Section will strive to achieve over the next five years.

Community Integration

GOAL: Create a new level of communication, dialogue, partnerships, and engagement with stakeholders and influencers

5-YEAR VISION: Sweetwater Authority is integrated into the living, vibrant community it serves, where experts, supporters, followers, and employees share experiences, ideas and knowledge in support of the Authority's mission.

Brand Reputation

GOAL: Enhance Sweetwater Authority's brand reputation

5-YEAR VISION: The utility is positioned more strongly as a modern thought leader and advocate for water stewardship, innovation and inclusion.

Reach and Impact

GOAL: Expand Sweetwater Authority's communications program reach and impact to more residents, businesses, and employees

5-YEAR VISION: There is synergy linking sweetwater.org, materials, media, newsletters, social media, and community outreach through enhanced use of workflow processes and a tactical plan for content.

One Voice

GOAL: Ensure Sweetwater Authority speaks with one voice

5-YEAR VISION: Social media policies, brand guidelines, and an internal communications channel meets the needs of the entire organization.

Seek Input

GOAL: Empower consumers and stakeholders with opportunities for input

5-YEAR VISION: A content marketing focus and qualitative and quantitative research opportunities make it easier for Sweetwater Authority to involve customers in the conversation and to connect them to content that matters.

GOALS AND STRATEGIES

Measures are quantitative metrics that measure progress toward each goal. Strategies are plans of action to achieve metrics and goals. These critical elements of the strategic communications plan, along with the Public Affairs Section Purpose Statement are represented on the Communications Strategy Framework on the following page.

Communications
STRATEGY
FRAMEWORK
2019 - 2024

PURPOSE
STATEMENT

Sweetwater Authority's Public Affairs Section provides relevant and engaging information to the Authority's Board, its customers, employees, the media, and other stakeholders.

The section informs and reaches the Authority's audiences through a multi-channel approach.

Communication is professional, intentional, culturally and linguistically appropriate, and transparent, while aligning with the Authority's mission, vision, values and strategic plan.

Public Affairs fosters and maintains relationships with community partners that enhance the Authority's reputation and support the Authority's operational goals.

GOALS

Community Integration
Create a new level of communication, dialogue, partnerships, and engagement with stakeholders and influencers

Brand Reputation
Enhance Sweetwater Authority's brand reputation

Reach and Impact
Expand Sweetwater Authority's communications program reach and impact to more residents, businesses, and employees

One Voice
Ensure Sweetwater Authority speaks with one voice

Seek Input
Empower consumers and stakeholders with opportunities for input

STRATEGIES

Community Integration
1. Build a key influencer network of stakeholders that share, endorse and support the organization
2. Share human interest content across all platforms
3. Be actively present and engaged at cultural events and organizations
4. Encourage employees to be brand ambassadors
5. Encourage others to write, develop and spread content on Authority communication channels
6. Invest in brand photography to ensure images are engaging, culturally relevant and authentic
7. Professionally translate select social media posts and highly visited web pages
8. Use digital marketing campaigns to reach targeted audiences
9. Explore new institutional partnerships with organizations that have shared goals and values
10. Adopt a cause or several causes

Brand Reputation
1. Build on the Authority's strengths and choose what the Authority's brand should be
2. Monitor social media
3. Be prepared for crisis communication needs
4. Focus on the value of tap water
5. Identify and pursue opportunities for positive media coverage
6. Promote brand and seek recognition through involvement in industry and regional organizations that align with the strategic plan

Reach and Impact
1. Develop an evaluation method for community engagement and sponsorship requests
2. Operate like a newsroom
3. Develop a dedicated content team
4. Enhance mobile version of website
5. Increase the use of videos/multimedia
6. Expand social media use for Instagram and Nextdoor

One Voice
1. Develop brand structure
2. Determine if a refreshed logo/naming convention is appropriate
3. Tie plan measures to employee performance
4. Create a workflow process that produces content efficiently
5. Use communications best practices
6. Consolidate printed materials

Seek Input
1. Tie public involvement to large-scale projects and initiatives
2. Ensure avenues for public input through social media
3. Include feedback in community outreach activities
4. Create a regular opportunity to share community input with the Board of Directors
5. Regularly survey customers and employees

MEASURES

Community Integration
- Engaged representation on boards and committees in the business community
- Social media engagement increases by 25%
- Youth education program outreach expanded by 10% to build an ethic of valuing water and water stewardship
- Customer satisfaction increases by 5%
- Stakeholder endorsements for major initiatives are sought and received
- Employee engagement increases by 5%
- Number of new institutional partnerships supporting Authority goals

Brand Reputation
- Engaged representation in water stewardship and innovation organizations
- Preference for tap water increases
- Glassdoor and Indeed ratings increase
- Positively trending sentiment in news coverage increases
- Recognition through awards that align with the strategic plan
- Create annual report/tracking on media coverage, baseline
- Stakeholder recall on communicated brand and values

Reach and Impact
- Open rate of external email newsletter is 35%
- Open rate of employee newsletter is 70%
- Post-event evaluations show increased participant satisfaction.
- Annual media story placement increases to 50 stories
- Shared content increases
- Average time on key website pages increases

One Voice
- Customer survey shows increased satisfaction with communication channels.
- Employee survey shows increased satisfaction with communication channels
- All printed and online materials follow internal policies and guidelines
- Sweetwater Authority brand is refined, expanded and consistent

Seek Input
- Comments, shares, retweets increase
- Stakeholder advisory committees are engaged and active
- Customer surveys are done regularly
- Customer feedback is sought after
- Stakeholder engagement is expanded

TACTICS

Tactics are planned activities that will be undertaken to implement each strategy.

COMMUNITY INTEGRATION

Create a new level of communication, dialogue, partnerships, and engagement with stakeholders and influencers

1. Build a key influencer network of stakeholders that share, endorse and support the organization

- Identify key influencers in the community and determine who owns the relationship, keep network up to date with scheduled reviews with relationship owners
- Create communication channels for the key influencer network
- Use Stakeholder Advisory Committee to continuously communicate brand and values to members and ask key influencers to participate on committee
- Tie key influencer network to programs and initiatives of their interest or that they are vested in
- Offer tours of Authority assets: reservoirs, treatment facilities, etc.
- Seek third-party endorsements, as appropriate

2. Share human interest content across all platforms

- Prioritize human interest stories in content development and place in social media and in employee communications
- Recognize employees and customers in social media stories and find ways to thank the Authority's most involved followers
- Key areas for high human-interest stories are showcasing veterans, diversity of employees, other notable roles in the community

3. Be actively present and engaged at cultural events and organizations

- Identify cultural events/organizations most beneficial to the Authority's goals
- Create annual community outreach calendar that prioritizes presence and engagement with these events/organizations
- Develop a goal for engagement for each event or organization (i.e. promote conservation, online services, photography contests, or other Authority customer programs and initiatives)
- Cycle end-of-year evaluation efforts and use as input for following year

4. Encourage employees to be brand ambassadors

- Identify employees throughout the Authority to serve as brand ambassadors; outline policies and pilot/evaluate a brand ambassador program; grow brand ambassador program over time
- Create and share boilerplate for use in email signatures
- Share and repeat elevator pitch (talking points) with employees about the Authority
- Ensure brand reputation is part of new employee onboarding
- Find opportunities for employees to exercise industry leadership at conferences and events, as appropriate

6. Invest in brand photography to ensure images are engaging, culturally relevant, and authentic

- Develop policies for using employee and customer images
- Identify what images best meet the Authority's brand communication needs, focusing on photos of people and employees engaging services, drinking water, in the community, etc.
- Submit selected photographic content to Communications Committee for review
- Contract with professional photographer
- Rotate photographs on website launch page and social media, perhaps using a carousel

7. Professionally translate select social media posts and highly visited web pages

- Determine which brand values and corresponding web pages would benefit the Authority most by translation to resonate with Spanish-speaking customers
- Schedule Spanish social media posts on a regular basis

8. Use digital marketing campaigns to reach targeted audiences

- Determine which content would help influence the Authority's brand goals with targeted audiences
- Schedule digital marketing campaigns on the editorial calendar, as needed

9. Explore new institutional partnerships with organizations that have shared goals and values

- Proactively identify potential industry and community partnerships that may advance long-term strategic plan initiatives
- Connect with like-minded organizations regularly on social media, reposting their content around shared values

10. Adopt a cause or several causes

- Adopt a cause that both captures the attention of stakeholders and galvanizes and engages employees
- That cause can connect the Authority and its employees to the environment, or supporting school children's interest in the water industry (such as the Hydro Station), or health and drinking water (Olivewood Gardens), or another cause related to the Authority's operations, service, or people

BRAND REPUTATION

Enhance Sweetwater Authority's brand reputation

1. Build on the Authority's strengths to choose what the Authority's brand should be.

- Decide what values and strengths the Authority wants to be known for, in support of its operational goals, and build out those values and strengths using this plan's strategies and tactics
- Maintain focus on those values and strengths, but do not necessarily be exclusive of temporal opportunities that may arise

2. Monitor social media

- Adopt a content marketing philosophy and develop a social media plan that coordinates with the editorial calendar
- Develop a policy for the section to ensure that social media platforms are monitored adequately after hours
- Set specific goals and metrics for social media platforms
- Set roles and parameters for social media engagement

3. Be prepared for crisis communications needs

- Develop a crisis communication plan with specific, pre-determined protocols for evaluation and response under different risk scenarios.
- Review crisis communications plan annually
- Participate in table-top exercises to practice and train staff.

4. Focus on the value of tap water

- Create a water quality messaging platform that demonstrates the value of the product the Authority produces
- Identify tap water ambassadors as part of an outreach campaign to show key influencers drinking tap water and talking about its value
- Use images and video showing people interacting with and drinking tap water

5. Identify and pursue opportunities for positive media coverage

- Secure a service that can assist the Authority with tracking news media both quantitatively and qualitatively
- Identify baseline and measure positively trending sentiment in news coverage
- Work to develop mutually beneficial media relationships
- Develop a "newsroom" or "news site" on the website that becomes where content is posted
- Calendar and produce or repost social and traditional media content for yearly events, i.e. Clean Water Day, World Oceans Day, migratory species cycles
- Create videos that can be provided to media
- When developing content, focus on producing stories that could easily be taken verbatim to the media

6. Promote brand through involvement in industry and regional organizations that align with the strategic plan and seek recognition

- On an annual basis, plan ways to earn recognition for the organization's work from water industry and regional organizations
- Seek out awards that are appropriate and strive to earn them
- Identify employees that are involved in industry associations and look for ways to use this to enhance the Authority's thought leadership

REACH AND IMPACT

Expand Sweetwater Authority's communications program reach and impact to more residents, businesses, and employees

1. Develop an evaluation method for community engagement and sponsorship requests

- Create and post guidelines that manage expectations for external organizations seeking sponsorships and funding
- Create a sponsorship policy with guidelines that allowing the Authority to evaluate potential benefit to communicating brand and values
- Evaluate community engagement events immediately after an event – continuous learning
- Hold annual staff evaluation or prior community involvement to determine where the Authority will get the most reach and impact from future community engagement

2. Operate like a newsroom

- Use an editorial calendar
- Use a content team approach
- Use a workflow that allows the whole team to see the process
- Build approved and evergreen content for regular use
- Repurpose content as much as possible
- "Package" your stories
- Use data to refine messages

3. Develop a dedicated content team

- Seek out content contributors from inside and outside the Authority
- Ensure all members get exposed to the different content team roles
- "Share the camera" with others to get content from all over the organization

4. Enhance mobile version of website

- Look for ways to cut scrolling on website
- Make the site perform better on a mobile platform

5. Increase the use of videos/multimedia

- Invest in the training necessary to efficiently create video
- Use animation when possible
- Seek out video content from other content contributors

6. Expand social media use for Instagram and Nextdoor

- Add Instagram as a social media channel
- Expand the use of Nextdoor to share information on operations and construction projects
- Use digital campaigns to reach targeted audiences
- Regularly schedule Spanish posts on social media and secure a resource that can respond in Spanish
- Time posts for when the audience is watching by posting at different times of the day and tracking engagement to find audience preferences
- Refresh the page regularly to make it visually appealing
- Piggyback off trending topics

ONE VOICE

Ensure Sweetwater Authority speaks with one voice

1. Develop brand structure
- Create brand guidelines to ensure consistency and enforce their use
- Ensure logo, tagline, color palette, typography, suggested use of images, and messaging reflect the brand drivers
- Ensure materials have an "expiration date" on them (typically included in the bottom right-hand corner) and pull them to refresh them
- Revise all printed and online materials with an eye toward brand guidelines

2. Determine if a refreshed logo / naming convention is appropriate
- Assess the current logo and naming convention to determine if it meets the Authority's needs
- Refresh the color palette and typography to update it without a major change
- Employ simple, memorable taglines or slogans

3. Tie plan measures to employee performance
- For the Public Affairs Section, measures within the plan can be sequenced over time and used to help evaluate performance against the current benchmark
- For other sections, a performance metric for teamwork and engagement can be created by encouraging content creation and supporting the Public Affairs Section as they implement this plan

4. Create a workflow process that produces content efficiently
- Use the tactical process included in this plan for content that includes:
  - An editorial calendar
  - Publishing guidelines
  - Channel plan

5. Use communications best practices
- Provide media training for executives and Board Directors as appropriate
- Regularly revisit internal and external social media policies to update and ensure their relevancy
- Visual content should have priority

6. Consolidate printed materials
- Create one employee newsletter that meets the needs of the organization
- Create one recreational brochure that provides all recreation opportunities in one place
- Strive to reduce the amount of printed material produced over time

SEEK INPUT

Empower consumers and stakeholders with opportunities for input

1. Tie public involvement to large-scale projects and initiatives

- Create a public involvement plan for large-scale projects and initiatives with the potential for public impact
- Consider the use of informal focus groups for message testing
- Integrate public input strategies into the initialization stages of large projects and initiatives

2. Ensure avenues for public input through surveys and social media

- Create a regular cycle (i.e. every two years) for a larger survey effort that includes questions on the various facets of customer satisfaction including communications
- Identify ways to seek customer input in less expensive, more frequent, online surveys
- Consider the use of an online engagement tool that can help foster engagement with customers and stakeholders

3. Include feedback in community outreach activities

- Survey participants at community outreach activities and events
- Report out on what the Authority heard during stakeholder meetings
- Have a mechanism to inform stakeholders of how the Authority responded to specific input

**4. Create a regular opportunity to share community input with Board Directors**

- Set up a regular meeting with the Communications Committee to review goals, measures and what's happening next
- Seek input from Board Directors on what they are hearing from their constituencies
- Share public input that staff gathers with Board Directors

5. Regularly survey customers and employees

- Create a regular cycle (i.e. every two years) for a larger survey effort that includes questions on the various facets of customer satisfaction, including communications
- Identify ways to seek customer input in less expensive, more frequent, online surveys
- Consider the use of an online engagement tool that can help foster engagement with customers and stakeholders
- Create a regular cycle (i.e. every two years) for a larger survey effort that includes questions on employee engagement and include feedback on employee communication

PROCESS

Our process builds beneficial relationships between our organization and our audiences.
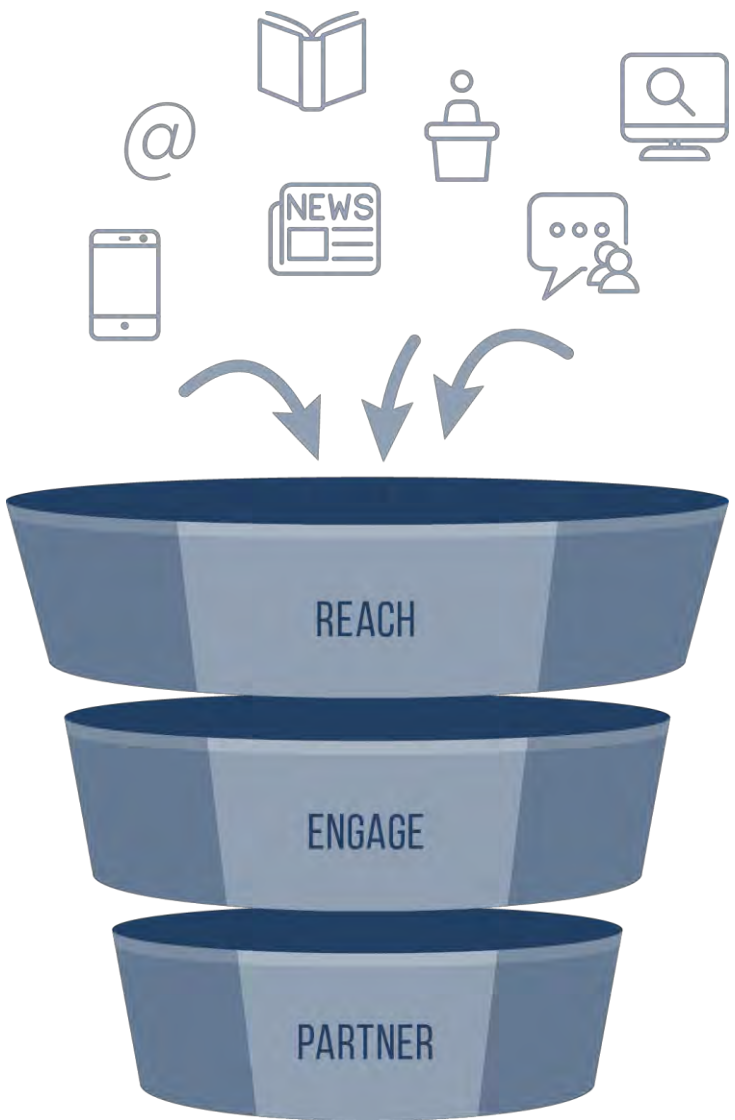
PURPOSE STATEMENT

Sweetwater Authority's Public Affairs Section provides relevant and engaging information to the Authority's Board, its customers, employees, the media, and other stakeholders.

The section informs and reaches the Authority's audiences through a multi-channel approach.

Communication is professional, intentional, culturally and linguistically appropriate, and transparent, while aligning with the Authority's mission, vision, values and strategic plan.

Public Affairs fosters and maintains relationships with community partners that enhance the Authority's reputation and support the Authority's operational goals.

REACH

ENGAGE

PARTNER

THE TEAM

The Public Affairs Section is surrounded by internal and external content creators. For the purposes of this plan, the section is organized to drive content creation. As a small team, it is important that members play more than one role, are comfortable pitching in, and are willing and enthusiastic about being assigned to different roles as the organization's needs evolve. The team is structured to enable other departments, influencers, and content consumers to contribute content.
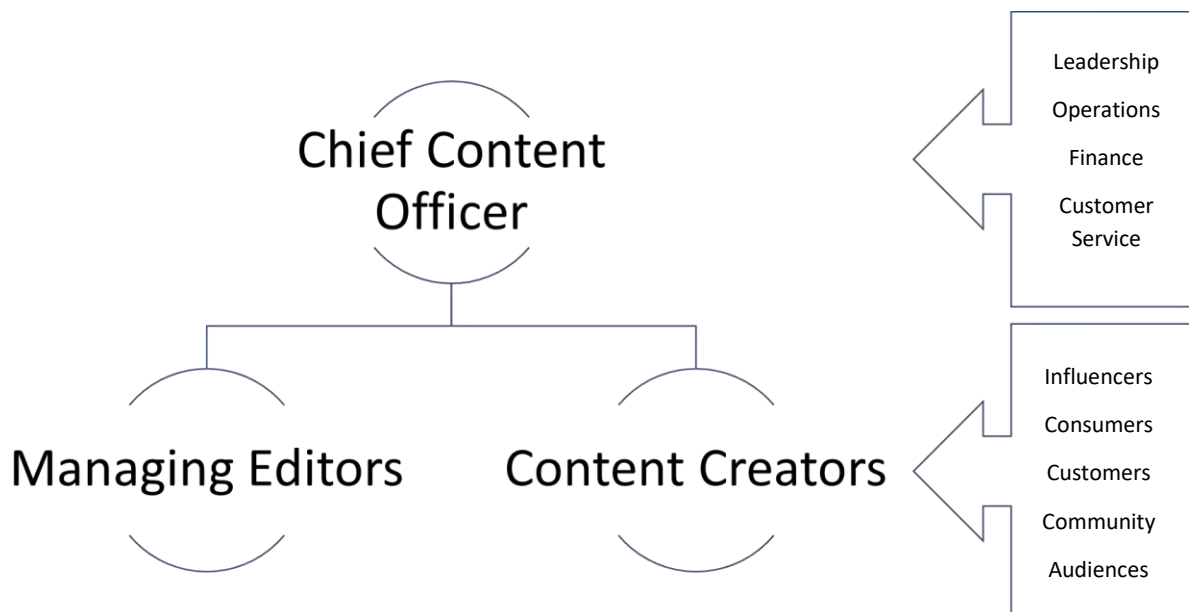
Typical roles for content creation are outlined below. One person will often fill multiple roles depending on staffing for projects. This plan is based on the principles of content marketing—which is a communications strategy focused on creating, publishing, and distributing content for a targeted audience. It is used to:

- Attract attention and generate interest
- Expand consumers' knowledge base
- Increase brand awareness or credibly
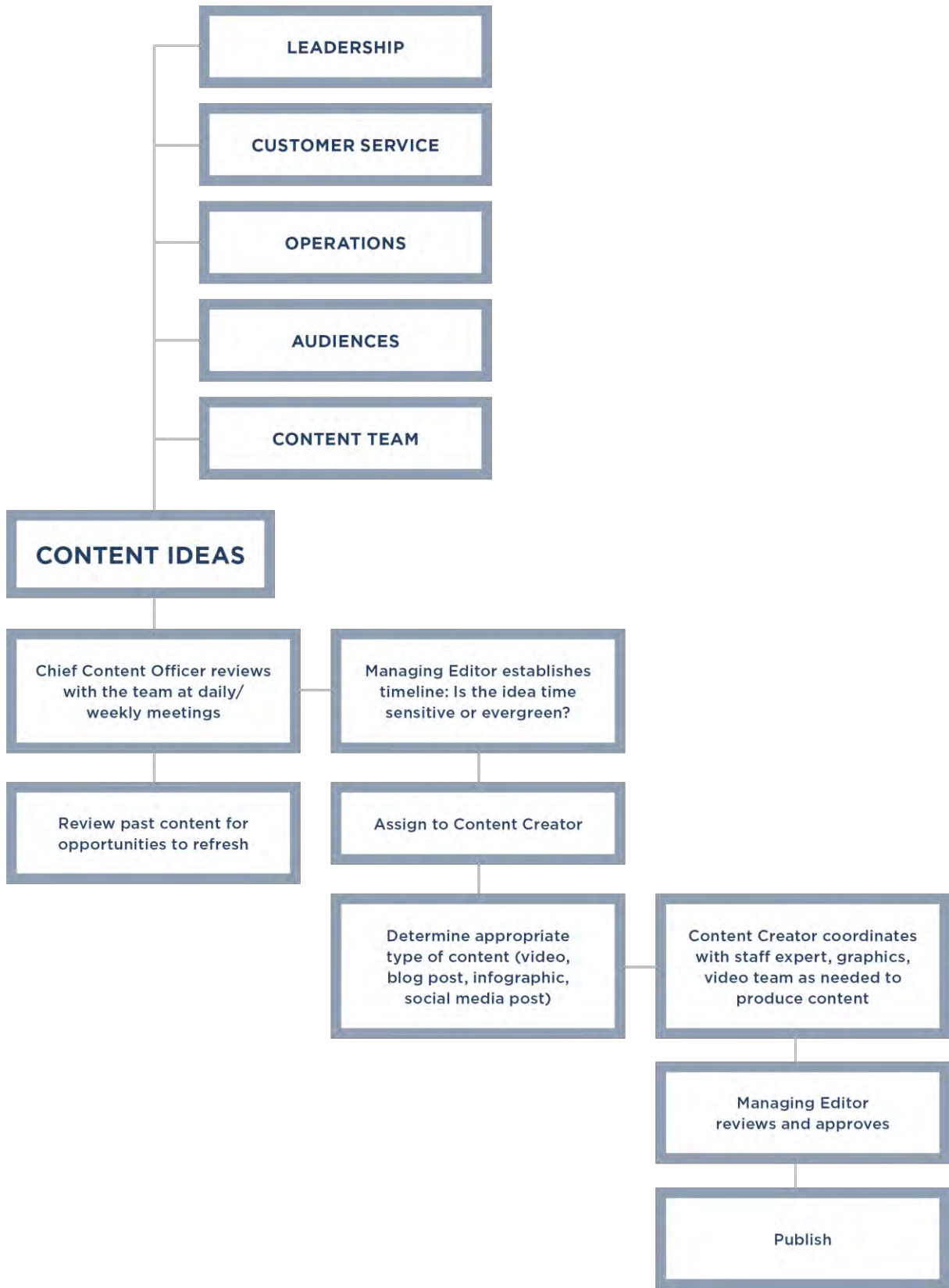- Engage an online community
- Demonstrate thought leadership

Chief Content Officer: The strategic lead is responsible for setting the overall editorial/content marketing purpose statement and building awareness of the statement throughout the organization.

Managing Editor: In charge of execution, working with the team to make the stories come alive including tone, style guides and content scheduling.

Content Creators: The writers and designers and hands-on people who identify, develop, and contribute to content.

Chief Content Officer

Managing Editors

Content Creators

Leadership
Operations
Finance
Customer Service

Influencers
Consumers
Customers
Community
Audiences

THE WORKFLOW

LEADERSHIP

CUSTOMER SERVICE

OPERATIONS

AUDIENCES

CONTENT TEAM

CONTENT IDEAS

Chief Content Officer reviews with the team at daily/ weekly meetings

Managing Editor establishes timeline: Is the idea time sensitive or evergreen?

Review past content for opportunities to refresh

Assign to Content Creator

Determine appropriate type of content (video, blog post, infographic, social media post)

Content Creator coordinates with staff expert, graphics, video team as needed to produce content

Managing Editor reviews and approves

Publish

Publishing Guidelines

To guide content creators, Sweetwater Authority has developed publishing guidelines that outline the organization's brand identity characteristics, the preferred voice and style content should be written in; and the editorial standards content efforts will be held to.

Our brand is:
- Reliable, innovative, safe, diverse, and a resource steward

Our tone should be:
- Professional, welcoming, helpful and service-oriented, respectful

We will publish:
- A mix of original content and curated content from other sources

We will allow authors to repost their content under the following conditions:
- When the message is a core goal of the company that supports the brand and merits reposting, i.e. water saving tips, financial stewardship, innovative uses of technology, environmental stewardship

We will link to other sites/pages under the following conditions:
- In cases where earned media provides visibility for the brand, goals, and/or people of Sweetwater Authority
- In cases where institutional partnerships exist with other organizations around shared values or programs that reinforce the brand, goals, and/or people of Sweetwater Authority
- In cases where awards and recognition of the Authority reside on other sites/pages

We will acknowledge/promote our contributors in the following way:
- Through social media channels – Facebook, Twitter, Nextdoor, and on the Sweetwater Authority website, as appropriate
- Resolutions and recognition from the dais at Authority board meetings

PLAN   STORY   PROCESS   MEASUREMENT

AUDIENCE   CHANNELS   CONVERSATION
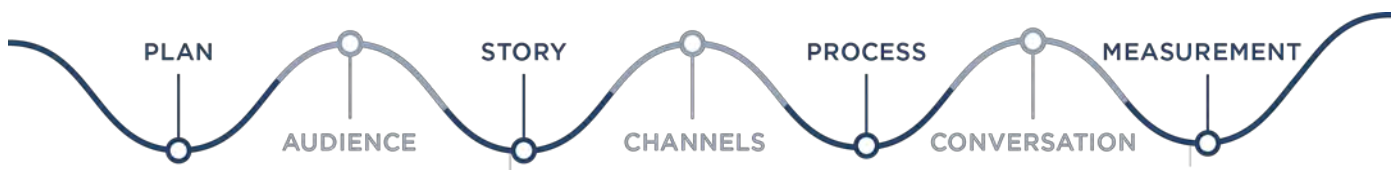
Developing a Brand Style Guide

A brand style guide is a set of standards that defines Sweetwater Authority's branding. The Authority will develop a guide that references grammar, tone, logo usage, colors, visuals, word usage, point of view, and more and share it with employees and content creators. The guide will help ensure that published content is consistent, polished, recognizable, and relatable to audiences.

Writing Section
What a brand says, and how it says it

Baseline Guide:
Select an existing style guide, such as AP Style as the baseline, and then add the organization's own changes, such as best practices for use of emoji's, whether to use "&" or "and," or if the organization uses "%" instead of "percent."

Formatting:
Add a section about formatting that covers these details: bullets, lists, hyphens, and quotes

Tone and Voice:
Give descriptions of tone and voice and provide examples of what the organization means in its selection, so that writers can easily grasp the concept.

Include information on sentence structure (long, complex sentences or very simple, short sentences, or somewhere in between).

Additional Details
If there are terms or words to stay away from, list them here.
Provide a brand personality spectrum to provide direction on what's important to focus on in written content

Visual Section
How a brand looks and what image it portrays

Formats:
Include information on how to stay on brand with other formats of content including infographics, video, animation, etc.

Colors:
Detail the Authority's palette of colors, including function. Include all the details a graphic designer would need to match the color palette.

Logo:
Include all versions of the logo and examples of proper uses. Include old or misused logos as examples, if this has been a problem.

Fonts:
Include brand fonts for headings, paragraphs, etc., and their uses.

Presentation format:
Include a link to the Authority PowerPoint template for presentations

Channel Plan

CHANNEL	AUDIENCE	VOICE	PURPOSE	FREQUENCY	CALL(S) TO ACTION	METRICS
Facebook	Customers, community stakeholders	Friendly, engaging	Communicate capital improvement projects updates, water saving tips; announce events, contests, job postings; drive traffic to website	Every other day	Visit website, attend events, "like" the page, use water saving tips	Followers, engagement
Twitter	Customers, community stakeholders, media	Professional, direct, concise, engaging	Communicate capital improvement projects updates, water saving tips; announce events and contests; drive traffic to website	Every other day	Visit website, attend events, use water saving tips	Followers, engagement
Nextdoor	Customers, community stakeholders	Neighborly, casual	Communicate water saving tips, planned service interruptions, local announcements	As needed	Customer questions on service, attend events, visit website	Visitors and interactions
YouTube	Customers, community stakeholders	Professional, creative, engaging	Repost earned media videos; water saving tips; community partnership videos	Monthly	Visit website	Views
Website	Customers, community stakeholders	Professional, direct	Communicate governance, strategic plan, programs, projects, job postings, customer service information, FAQs	Several times a week	Attend events, apply for job openings, support infrastructure projects and initiatives, use water saving tips	Visitors
Digital campaigns	Customers, community stakeholders	Professional, welcoming	Communicate great place to work	Monthly	Visit website, apply for job openings	Unique users reached, clicks to website/shares
News Releases	Customers, community stakeholders, media	Professional, direct	Communicate timely and newsworthy information about the Authority	As needed	Sharing information	Media hits, reach, story tone
Fact Sheets	Customers, community stakeholders	Friendly, engaging, informative	Communicate and inform	As needed	Visit website for more information	Website views
Customer Newsletter	Customers	Friendly, engaging	Inform to encourage engagement	Quarterly	Visit website, attend events, participate in programs	Customer recall on survey
Advertisements	Customers	Friendly, engaging	Promote Authority initiatives, programs, and events	Monthly	Visit website, attend events, participate in programs	Digital campaign data
Bill Inserts	Customers	Friendly, engaging	Communicate projects, programs, events, and incentives	Quarterly	Visit website, attend events, participate in programs	Customer recall on survey
Consumer Confidence Report	Customers	Professional, direct, in compliance	Meet legal reporting requirements	Annual	Visit website	Customer recall on survey
Annual Report	Customers, stakeholders	Engaging, informative, concise	Share the Authority's past fiscal year	Annual	Visit website	Stakeholder feedback
Presentations	Customers, stakeholders	Friendly, engaging	Inform, engage, influence	As needed	Partner, engage, participate	Stakeholder feedback
Employee Newsletter	Employees	Engaging, informative	Inform to encourage engagement	Weekly	Be an informed employee	Feedback from employee survey

Evaluation

The methods used to measure outcomes and progress toward communication goals

Community Integration
5-Year Metrics

GOAL: Create a new level of communication, dialogue, partnerships, and engagement with stakeholders and influencers

- *Engaged representation on boards and committees in the business community*
- *Social media engagement increases by 25%*
- *Youth education program outreach expanded by 10% to build an ethic of valuing water and water stewardship*
- *Customer satisfaction increases by 5%*
- *Stakeholder endorsements for major initiatives are sought and received*
- *Employee engagement increases by 5%*
- *Number of new institutional partnerships supporting Authority goals*

Brand Reputation
5-Year Metrics

GOAL: Enhance Sweetwater Authority's brand reputation

- *Engaged representation in water stewardship and innovation organizations*
- *Preference for tap water increases*
- *Glassdoor and Indeed ratings increase*
- *Positively trending sentiment in news coverage increases*
- *Recognition through awards that align with the strategic plan*
- *Create annual report/tracking on media coverage, baseline*
- *Stakeholder recall on communicated brand and values*

Reach and Impact
5-Year Metrics

GOAL: Expand Sweetwater Authority's communications program reach and impact to more residents, businesses, and employees

- *Open rate of external email newsletter is 35%*
- *Open rate of employee newsletter is 70%*
- *Post-event evaluations show increased participant satisfaction.*
- *Annual media story placement increases to 50 stories*
- *Shared content increases*
- *Average time on key website pages increases*

One Voice
5-Year Metrics

GOAL: Ensure Sweetwater Authority speaks with one voice

- **Customer survey shows increased satisfaction with communication channels.**
- **Employee survey shows increased satisfaction with communication channels**
- **All printed and online materials follow internal policies and guidelines**
- **Sweetwater Authority brand is refined, expanded and consistent**

Seek Input
5-Year Metrics

GOAL: Empower consumers and stakeholders with opportunities for input

- **Comments, shares, retweets increase**
- **Stakeholder advisory committee is engaged and active**
- **Customer surveys are done regularly**
- **Customer feedback is sought after**
- **Stakeholder engagement is expanded**

2019 - 2020 STRATEGY FRAMEWORK

PURPOSE STATEMENT

Sweetwater Authority's Public Affairs Section provides relevant and engaging information to the Authority's Board, its customers, employees, the media, and other stakeholders.

The section informs and engages the Authority's audiences through a multi-channel approach.

Communication is professional, intentional, culturally and linguistically appropriate, and transparent, while aligning with the Authority's mission, vision, values and strategic plan.

Public Affairs fosters and protects relationships with community partners that enhance the Authority's reputation and support the Authority's operational goals.

GOALS	TACTICS	MEASURES
Community Integration Create a new level of communication, dialogue, partnerships, and engagement with stakeholders and influencers	• Identify key influencers in the community and determine who owns the relationship, keep network up to date with scheduled reviews with relationship owners • Create communication channels for the key influencer network • Use Stakeholder Advisory Committee to continuously communicate brand and values to members • Identify cultural events/organizations most beneficial to the Authority • Create annual outreach calendar that prioritizes presence and engagement with these events/organizations • Identify employees throughout the Authority to serve as brand ambassadors, outline policies and pilot a brand ambassador program • Identify three content producers from within the Authority • Develop policies for using employee and customer/consumer images from the community • Begin translating some web pages and social media to Spanish	• Engaged representation on boards and committees in the business community. • Social media engagement increases by 5% • Youth education program outreach expanded by 2% to build an ethic of valuing water.
Brand Reputation Enhance Sweetwater Authority's brand reputation	• Review and develop social media policies and set specific goals and metrics for social media platforms • Create a water quality messaging platform that demonstrates the value of the product the Authority produces • Secure a service that can assist the Authority in tracking news media qualitatively and quantitatively • Develop a newsroom or news site on the website that becomes the place that content is posted to	• Positively trending sentiment in news coverage increases • Create annual report/tracking on media coverage, baseline • Engaged representation on water stewardship and innovation organizations
Reach and Impact Expand Sweetwater Authority's communications program reach and impact to more residents, businesses, and employees	• Create a sponsorship policy with guidelines that allow the Authority to evaluate potential benefit to communicating brand and values • Evaluate community engagement efforts immediately after every event • Engage in the processes outlined in this plan (editorial calendar, content team approach, workflow) • Revise customer newsletter, create an email version • Improve how website performs on a mobile platform • Expand use of Nextdoor to share information on operations and construction projects	• Open rate of external email newsletter is 15% • Open rate of employee newsletter is 45% • Post-event evaluations show increased participant satisfaction. • Annual media story placement increases to 30 stories • Shared content increases • Average time on key website pages increases
One Voice Ensure Sweetwater Authority speaks with one voice	• Create brand guidelines to ensure consistency, and enforce their use • Begin revising all printed and online materials to align with brand guidelines • Incorporate plan elements into section's employee evaluations • Enhance the use of visual content • Create one employee newsletter that meets the needs of the organization • Work to reduce the amount of printed materials produced over time	• All printed and online materials follow internal policies and guidelines
Seek Input Empower consumers and stakeholders with opportunities for input	• Set up a regular meeting with the Communications Committee to review goals, measures and what's happening next • Report out on what the Authority heard during stakeholder meetings • Identify ways to seek customer input in less expensive, more frequent, online surveys • Contract to do a customer survey to get a baseline in the next budget year	• Comments, shares, retweets increase • Citizen advisory committee is engaged and active • Stakeholder engagement is expanded

SWEETWATER AUTHORITY

APPENDIX A

COMMUNICATIONS REVIEW AND BRAND ASSESSMENT

Communications Review & Brand Assessment

SWEETWATER AUTHORITY - 2019

Prepared by:
RAFTELIS | SVPR

Contents

The Big Picture

What we learned at Sweetwater Authority

The consultants offer these general observations based on input from Sweetwater Authority, stakeholder interviews, customer and employee surveys, and a review of Sweetwater Authority printed materials and online communication.

Celebrate this:

Relationships: Sweetwater Authority has made significant progress in building and maintaining relationships with a diverse range of stakeholders.

Broad-based communication toolbox: Nearly every communication tactic and tool available to public agencies are used by Sweetwater Authority.

Proactive customer messaging: Customer service is a core tenant of messaging and a value employees embrace.

Credibility: Stakeholders and customers report that Sweetwater Authority is a credible source of information, and employees look to managers for growth and development.

Pride: Employees express pride in their service to the community.

Presence in the community: Sweetwater Authority prioritizes being present in the community, from booths at events, to signage, to availability for walk-in payments.

Consider this:

Consistency: Printed and online materials lack consistency in design and use of logo, color, fonts, etc., making it harder to build understanding with customers, stakeholders and employees.

Consolidation: A greater emphasis on online communication and merging printed materials may make communicating more efficient.

Evaluation: Goals and metrics could be enhanced to provide value and allow for regular review of efforts to determine effectiveness.

Cultural Appropriateness: Sweetwater Authority translates materials and connects to culturally diverse audiences, but improvements could be made.

Visual Interest: Materials lack visual interest and regularly do not demonstrate a connection to people—both customers and employees.

People as an Asset: Employees' connection to customers is a communication opportunity that could be emphasized.

Introduction

In the spring of 2019, Sweetwater Authority (Authority) contracted with Raftelis to conduct a review of the utility's current communication practices, printed and online materials and needs to create a foundation for the development of a long-term Strategic Communications Master Plan.

The Authority has grown its communications program steadily to the point where it is staffed by three full-time public relations practitioners. The Authority wanted to take a deep dive into its current communications program to assess what steps, strategies and communications techniques should be employed in the next five years and to align those strategies with the Authority's 2017 Strategic Plan.

Specifically, the communication review and brand assessment were designed to:

- Assess the effectiveness of the Authority's current communication program.
- Solicit opinions and perceptions of stakeholders who represent external and internal audiences.
- Discover communication and service gaps.
- Recommend strategies to enhance communication with key audiences.

SPECIAL NOTE

A portion of the information used to write this report came from stakeholder interviews and data collected from the most recent surveys available. It is important to note that audiences stated what they know or believe, regardless of what is real or actual. Whether real or perceived, improvement is impossible unless there is a plan to address what people perceive to be true.

Data Collection

Stakeholder Interviews

A major component of this communications review and brand assessment was to interview internal and external stakeholders to gauge perceptions about the Authority. The interviews were conducted in person in May 2019.

Questions were similar for all participants, although some wording may have been adjusted to make it appropriate for the target audiences, which included:

- Board Members
- Executive Leadership
- Frontline Staff and Union Membership
- Key External Community Stakeholders
- Community Partners and Customers

The consultants found every group to be forthright in offering feedback and productively sharing positives along with opportunities for improved communication.

Customer Survey

The Authority last conducted a customer satisfaction survey in 2015. Although a bit dated, the survey had some important indicators that should be factored into this report given that the Authority has no reason to believe that the survey data is not generally valid today.

Employee Engagement Survey

A summary report of the August 2018 Employee Engagement Survey was provided for review so that the consultants could better understand perceptions about the Authority's internal communications.

Materials and Website Review

A review of the Authority's printed and online materials, customer communication, social media and website was conducted by the consultants. The team spent time assessing branding, messaging and the overall impact of the materials submitted by the Authority, both in hard copy and electronically.

Your Assets

No. 1 - Relationships

Sweetwater Authority has made significant progress in building and maintaining relationships with a diverse range of stakeholders.

The Authority has significantly enhanced its relationships in the community, and this is demonstrated by the positive comments from stakeholders during interviews. This emphasis on community relationships has been recent, ramping up with the change in leadership at the Authority and the need to address future funding issues.

Traditionally, community relationships were "owned" by Board Directors and may have been viewed more as part of the political nature of the Authority's governance structure than as part of a community relations program. Until recently, staff reports that for several years the Authority was not strategically investing in community relations. This effort was reprioritized with the hiring of a new general manager.

Today, executive leadership, public relations staff and the Board all take part in developing relationships in the community and do so with enthusiasm. The payoff is huge. The Authority was able to secure endorsements from some key stakeholders during their recent rate study for rate changes that had not been supported for several years previously.

To enhance this effort, the Authority could be more strategic about what organizations and events it will support by developing a way to evaluate return on investment. Being active in the community begets more requests for activity, which is great, except when you consider the size of Sweetwater's staff.

Relationships between employees and management also appear strong, generally. The Authority's recent employee engagement survey showed support for statements like "my manager helps me learn and grow" and "my manager makes it easier to do my job well."

"This agency is by the people and for the people"

"The way the Authority connects with the community is amazing!"

Your Assets

No. 2 - Broad-based Communication Toolbox

Nearly every communication tool and tactic available to public agencies are used by Sweetwater Authority.

The inventory of tools in the Authority's toolbox is rich. The Communications Team is regularly using and maintaining the following communication tactics:

- News releases
- Social media (Facebook, Twitter, Nextdoor and YouTube)
- Website
- Fact sheets
- Customer newsletters
- Advertisements
- Bill messages and inserts
- Customer notices and letters
- Signs
- Brochures
- Water Quality Report
- Flyers
- Videos
- Annual Report
- Applications
- Games/Contests
- Youth education
- Events and outreach
- Community relations
- Employee newsletter(s)
- Presentations

The Authority also has three full-time communications professionals on staff to manage these tools, which means they have the staff resources to effectively execute a strategic effort.

In a 2015 customer survey, customers said they favored three methods of receiving information: direct mail, e-mail and, if necessary, telephone. In discussing this with staff, the belief is that, if available, email and text would be preferred today. Staff also reports this is employees' preference as well.

Your Assets

No. 3 - Proactive Customer Messaging

Customer service is a core tenant of messaging and a value employees embrace.

In stakeholder interviews, the customer satisfaction survey, employee engagement survey and in reviewing the Authority's materials, it is clear that customer service is a priority for the agency.

The 2015 customer survey noted that of the one-third of customers that have personal contact with the Authority's staff, two-thirds of them are very satisfied with the service provided. For the Authority, personal contact is highly prioritized. The agency sees thousands of walk-in customers every month who wish to pay their bills in person.

"The Authority delivers very well on its mission, but we need to improve and elevate the agency. We can do better. We need to elevate and improve the customer experience. We want to "WOW" our customers."

From our data collection efforts, it appears that on occasion the Authority goes above and beyond in caring for its customers. While proactive customer messaging is highly evident in the materials we reviewed, stories about customer service do not show up often in newsletters, social media and in other communication channels. The Authority should take this asset and use it frequently, because the customer service levels the Authority is bringing are not the norm of experience for other utility and government services that customers purchase and experience.

This distinction between providing a service and providing a product for the Authority is key because of the value conversation it engenders. The majority of the Authority's customers say they prefer drinking bottled water. When asked about the value of water in terms of cost in the 2015 survey, residents were mixed on whether or not the existing product represents good value for the money. This indicates that the Authority may benefit from shifting the value conversation to the service it provides rather than the actual product (drinking water).

Your Assets

No. 4 - Credibility

Stakeholders and customers report that Sweetwater Authority is a credible source of information, and employees look to managers for growth and development.

In stakeholder interviews, the customer survey, and employee feedback, it is evident that the Authority is seen as a credible source of information. In the 2015 customer survey, 80 percent of residential customers were aware that the Authority is their tap water provider, and 75 percent were satisfied with the quality of the water provided. Alignment among employees is evident in the employee engagement survey. In open-ended responses to questions, the words "professional," "integrity," "ethical," and "dedicated," were common employee responses to questions related to their employer.

Being credible is a significant asset. It allows an organization to be forward focused because there is a reservoir of trust to draw on when the agency determines a policy change is needed or when it must invest in its infrastructure or employees.

"We are known for being progressive and problem solving."

As the Authority implements its 2017 Strategic Plan, one area that has been identified as a need is to create and facilitate a way to get more public input into the organization to enhance decision-making. The Authority intends to do this using an advisory committee process that would work through one strategic plan initiative each year. The membership on the committee would change on an annual basis.

Facilitating and seeking input from an advisory committee will mean an investment in community members who will learn a lot about the Authority in the process. Building relationships with these committee members that are ongoing—and not just for the length of their term—is advised. Third parties that are asked to weigh in on these important topics can become strong advocates (or detractors) for the agency. Being highly intentional in this effort will be critical to its success.

Your Assets

No. 5 - Pride

Employees express pride in their service to the community.

How can we demonstrate our employees' pride, dedication and connection to the Authority to our customers so that they place more value on the service we provide?

"I would like to see customers aware of our water resources, reliability of our systems and our commitment to water quality. You can drink tap water."

In interviews with employees and leadership and in reviewing the employee engagement survey, it is evident that both staff in leadership positions and frontline employees are proud of the work they do and the accomplishments of the Authority.

While employees sometimes complained about working in silos or communication and technology challenges, they find themselves rejuvenated when they get a glimpse of the broader work and magnitude of what the Authority accomplishes for its customers and the broader region. Simply put, employees find great meaning in the work they do.

There are several communication challenges that employees would like to have solved so that they can better connect to the broader mission that they are so passionate about. Frontline and field employees feel more disconnected than administrative employees and cite difficulty in accessing the traditional communication tools that the Authority uses currently. Suggestions to consolidate the number of employee newsletters to just one and to be able to access the internet while in the field from a mobile device were frequent. Some employees suggested that these barriers contributed to a feeling that they were not connected to what's happening with their employer.

Employees did say they like meetings, and they especially liked to hear directly from senior management and executives. They suggest more frequent larger group meetings as a way of hearing about the direction in which the Authority is heading and particularly on good news about their employer.

With employees stating that they are proud of the work they do, the Authority has an opportunity to look for ways that employees can be even more connected with the customers they serve in a brand ambassador role. Given the amount of content that the communications team is having to generate for the many communications channels they manage, having additional employees who are helping to fill the content pipeline would be worthy of consideration.

Your Assets

No. 6 - Presence in the Community

Sweetwater Authority prioritizes being present in the community, from booths at events, to signage, to availability for walk-in payments.

Being visible in the community is a critical component of public agency communication programs, and the Authority has really stepped up to this challenge. In addition to sponsoring programs such as a demonstration garden with partners, the Authority has an extensive youth education program and will soon launch a Hydrostation effort aimed at youth which will be housed at the Authority's desalination plant.

Communications staff are regularly asked about participating in events, putting together flyers, and staffing booths. In addition, the Authority has recreation opportunities at its reservoirs, offers contests, and hosts thousands of customers each month in its lobby as they pay their water bills in person. Directors and executive leadership play a part here too; they are regularly connected to stakeholder events in the community and, with a primarily elected Board, opportunities to be involved in community events and meetings are valued by Board Directors.

In discussions with the communications team and executive leadership, it is evident that this community involvement is important but that a strategic approach to future involvement is needed. The Authority does not currently have a way to evaluate future opportunities and current activities, and the possibilities and invitations continue to grow. There are also regular requests to sponsor and fund events and organizations,but there is no formal policy in place to provide a way to say "no" to opportunities that do not meet the strategic needs of the Authority.

Being more intentional about determining which organizations and partnerships are best aligned with the 2017 Strategic Plan would be a good first step toward having a proactive community relations plan in place. Doing so would help to ensure that community presence is not a one-time thing, but rather an ongoing effort to connect deeply into the community.

The Challenges

No. 1 - Consistency

Printed and online materials lack consistency in design and use of logo, color, fonts, etc., making it harder to build understanding with customers, stakeholders and employees.

The materials created by the Authority were thorough, and featured concise writing, but lacked brand consistency, including improper use (or lack) of Sweetwater Authority logo, color palette, and fonts. Given the direction the utility expressed in its 2017 Strategic Plan, interviews with key leaders and directors of the organization and employee feedback, the brand itself does not seem to reflect the forward-thinking, customer-focused utility that Sweetwater Authority sees itself as.

The consultants reviewed all the materials provided, the website and social media and recommendations for each of these areas is included in Appendix E.

Looking at the materials from a consumer perspective, the broad-based communication program could be more efficient and effective by considering whether the look, feel and messaging of materials and online offerings is meeting the needs of the consumer. Obviously, many of these materials are provided over time and never consumed in one sitting, such as during this review. But when spread out on a table and consumed in bulk there is a lot of material that and it is likely difficult for the communications team to keep track of it all.

Process is also not built into the mix. External communication to customers may not always make it to the frontline employees that work directly with those customers, and internal communications is done by various departments; sometimes without coordination or approval.

By its very nature, consistency leads to understanding, awareness and loyalty. Ultimately, consistency leads to trust. As an organization, if you're not being consistent in how you're communicating, you're missing the mark.

Consistent communication means taking a fully integrated approach across your brand—the systems you use to evoke that brand, the platforms and messaging you use to speak to your audiences, even the colors and visuals you use to represent who you are.

The Challenges

No. 2 - Consolidation

A greater emphasis on online communication and merging printed materials may make communicating more efficient.

The flip-side of a having a broad-based communications program is that the Authority has a lot of communication channels to maintain and keep current. This challenge appears to be a struggle when viewed through a bulk material review and in discussions with employees.

The Authority has no fewer than five employee newsletters, only one of which is produced by the communications team. Consolidating all this information into one newsletter with a consistent publication and distribution is something that employees, communications team members and executive leadership said was a priority.

Similarly, the Authority relies heavily on printed materials, which rapidly become out of date and can stack up in frontline employees vehicles or at far-flung facilities. Evaluating what materials are highly valuable and useful and eliminating or consolidating the rest is recommended. For example, recreation flyers for the various sites could be place in one printed document so that users can see all the Authority offerings in one place.

Converting some of this information to an online offering is also recommended. Online information can be kept current easier than printed material and it's less expensive to maintain. Videos of recreation offerings or water conservation information housed on sweetwater.org is preferable to many consumers, especially if this can be accessed easily on their mobile device. Doing so also provides better content for social media.

Ultimately, the Authority may want to consider a content marketing approach to communications, which guides the content it produces so it stays focused on your communications goals and doesn't get diluted with scope creep. Having a communications program purpose provides a guide for deciding what content to develop or not develop and allows you to think through your offerings by coming from a place where you have identified the information needs of your consumers first.

LEADERSHIP BRAINSTORMING QUESTION

How can we identify what's important to our audience, how we are going to help them, and what they will get out of it?

Do we have a sustainable process for creating, connecting and distributing content?

The Challenges

No. 3 - Evaluation

Goals and metrics could be enhanced to provide value and allow for regular review of efforts to determine effectiveness.

The Authority's communications team has been successful in advancing the agency's reputation, getting involved in the community, supporting internal communications and producing material that helps build customer understanding. When asked how they know they did all of this, however, they are challenged to point to metrics or evaluations that demonstrate this success.

Validating the efforts the Authority is making in communications helps achieve your organization's objectives. The absence of measurement can lead to misinterpretation of your efforts. This can be challenging in a field where success is often defined as, "we know it because it feels right," but in the highly technical water industry, numbers and metrics have great value.

Evaluation also allows you to make adjustments and corrections. Sometimes not everything planned during the initial stages of the campaign is working. As you implement your campaign, some factors and circumstances change. Some parts of the campaign are less effective than other parts. Or perhaps something is not working at all. Measurement and evaluation help you to identify those elements and make necessary adjustments and corrections to achieve better results.

Measurement also allows you to assess your past performances to plan your future strategies. It is critical for planning budgets and setting key performance indicators for employee performance as well.

People are exposed to diverse media and many messages daily. Armed with accurate and collected data, you can provide explanation and reasoning in any situation should confusion or misinterpretation about communication happen. This is particularly important in times of reputation crisis.

Developing metrics and evaluations that play off strategic goals will help the Authority plan for the future, better identify and gauge your target audience and achieve your communication objectives.

LEADERSHIP BRAINSTORMING QUESTION

How can we begin to incorporate metrics to measure our success in social media, website, engagement, media relations and brand awareness?

TAKING A CLOSER LOOK

Sweetwater Authority tracks the media coverage it receives by whether it was a proactive pitch or a reactive story and how much coverage was produced.

Adding the following to this effort would demonstrate not only quantity, but quality and effectiveness:

- **Tone**
- **Scoring the article quality**
- **Message resonance**
- **Placement**
- **Amplification**

The Challenges

No. 4 – Cultural Appropriateness

Sweetwater Authority translates materials and connects to culturally diverse audiences, but improvements could be made.

In nearly every context, the community make-up of Sweetwater Authority's service area is diverse. English is a second language to many of the Authority's customers, with a significant percentage of the service area's residents speaking Spanish or Tagalog at home. Income disparity is present too. Bonita is the most affluent of the three communities, and National City has the least affluent residents, where the median household income (MHI) is 34 percent below the state MHI and more than 20 percent of the residents live below the poverty level.

The Authority recognizes this communication challenge and translates some materials into Spanish using bilingual employees, has bilingual employees available to assist customers, and connects to different communities through events. The Authority also embraces diversity within its leadership. It has an entirely Latino Board of Directors and an executive team led by women.

In stakeholder and employee interviews, and in the review of materials, there was a sense that more should and could be done to enhance the cultural appropriateness of the Authority's communication efforts.

At present, all social media posts are in English, and the website can only be translated using Google Translate, which is inadequate and may be misleading given the amount of technical information on sweetwater.org. Materials are not professionally translated, and that means they are likely translated verbatim rather than being translated accurately. Some English-based word-play or references may not translate well into another language due to linguistic and cultural differences.

Images used in social media and in materials are also not always representative of the community or culturally appropriate because of reliance on available stock images and a lack of available brand imagery.

How people of different cultural backgrounds prefer to get information is also relevant here. Latinos use the Internet as much as any other culture but strongly prefer to do so with mobile devices over a computer. Currently, sweetwater.org does not display well on a mobile device, which may curtail engagement through that channel.

LEADERSHIP BRAINSTORMING QUESTION

How can we enhance our communication offerings to become more culturally appropriate and relevant to community we serve and our employees?

"We should be known as an agency with opportunities for women, minorities, and LGBT people."

"Regarding culture I think that we are doing a good job going to fairs to reach out to Hispanics, Filipinos, etc."

Brand imagery is a need for the Authority. What steps can we take to improve what we have available to use?

TAKING A CLOSER LOOK

Which photo creates a better connection to the consumer?

The Challenges

No. 5 - Visual Interest

Materials lack visual interest and regularly don't demonstrate a connection to people—both customers and employees.

Words matter, but images are what draws a reader in to understand your message. In reviewing the Authority's materials, both print and online, there is a lack of visual interest. This means that if a customer or stakeholder is interested in the topic and is seeking out information, they will find well-written content available to them. However, most of the Authority's audiences are passive information seekers. They will only engage if their interest is piqued by something—and that means it must catch their eye.

Of the visual information that the Authority provides in its print and online materials, photos are often stock images or of the natural resources the Authority relies on. This is particularly evident on sweetwater.org where there are beautiful photos of the Authority's water supply, but no images of the finished product—drinking water itself.

People are strongly and emotionally connected to water, and connected to images of other people. Given that customer survey data shows a strong preference for bottled water over consuming tap water, rethinking how the Authority presents itself visually is important. Providing images of people interacting with water enhances the brand and reinforces the Authority's tagline—"providing safe, reliable water."

Images should be culturally representative and focus on the service the Authority provides to customers. Stock images lack authenticity to a discerning public that constantly scrolls through Facebook and Instagram on their phone. They know when something is too slick—it's what they see all the time. An authentic shot of an Authority employee's face in a portrait format will make them pause.

The use of infographics is also lacking in the Authority's print and online materials. In a world where traditional and social media have made graphics standard, it's now more difficult to get a casual reader to pause more than a few seconds to read through copy on a webpage. Having colorful, interesting infographics can build understanding and enhance engagement significantly.

The Challenges

No. 6 - People as an Asset

Employees' connection to customers is a communication opportunity that could be emphasized.

"Our main focus should be that we value our customers."

Sweetwater Authority has an abundant resource in the 121 employees that make up their staff. In reviewing the employee engagement survey and in talking to stakeholders internally and externally, the employees' connection to the Authority's customers is frequently mentioned. Employees report that their work is meaningful, and customers report in the customer survey that when they interact with employees that they feel cared for.

Storytelling is at the core of public relations and using compelling angles to capture the attention of the media and customers will boost engagement—both internally and externally. Great storytelling for utilities combines words and visuals that engage a targeted audience, while taking them on a journey to discover your service.

In reviewing content in printed and online formats, the human element is there, but it is underdeveloped. Content is also being specifically developed for internal and external audiences and is not shared across these platforms.

Stories about your employees and your customers can be used on multiple channels, whether it's Facebook posts, tweets, an employee newsletter or video. This also removes the barrier between developing content for employees and separate content for external audiences. People are simply more interesting than facts and things. Stories about facts and things should include people interacting with them.

To do this successfully the Authority must speak truthfully and authentically to keep the audience engaged and use its brand promise to make sure that the characters and ideas in your stories align with the overall brand. Doing so will make the content relatable.

Action Items

Introduction

In developing recommendations for use by Sweetwater Authority the consultants kept the next phase of our development of the Authority's five-year Strategic Communications Master Plan in mind.

Recommendations in this section are those where the most meaningful improvement can be made. It is anticipated that these action items will need to be ongoing. Some may require funding, and some require analysis and evaluation. The consultants expect that these action items, and this whole report, will become the foundation for the development of the master plan.

The action items are not in a prioritized list, rather they are all needs that were observed in working with the Authority and listening to its stakeholders.

Additional recommendations are included in Appendix E: Materials and Website Review.

Take Action

No. 1 - Develop Brand Structure

Focus on quality over quantity, but if you can do both, great!

Get to know your audience—call out consumers specifically and thank them.

Be bold. Social media requires a personality.

Get buy-in from the top. Communication starts at the top and is the glue that holds the organization together.

Make sure your purpose is clear, concise and iterative.

RECOMMENDATION

Develop a Communications Purpose Statement, Brand Guidelines and Templates to address challenges with consistency, consolidation needs and to allow evaluation of communication efforts in the future.

Develop a Purpose Statement to guide the content you produce

Having a purpose statement for the Authority's communications efforts means you will be able to focus on your communication goals and won't get diluted with scope creep. Your purpose is your touchpoint for your team to ensure an intentional strategy and program. It should include a definition of your core target audience, what will be delivered to the audience and the expected outcome for the audience. Your purpose is what you stand for and how you provide information to your audience that changes behaviors, awareness or beliefs.

Create Brand Guidelines to ensure consistency, and enforce their use

Brand guidelines should consist of the following: logo (and uses of), tagline (and uses of, with or without logo., etc.), color palette, typography, suggested use of images, and messaging that reflects the brand personality/driver.

Determine if a refreshed or new logo / naming convention is appropriate

The Authority has referenced potential concerns with its logo and how it is referred to (SWA? Sweetwater? The Authority?). Changing a brand identity entirely is a significant undertaking, however there are ways to refresh the look and feel that may be a good first step. Regardless, the Authority should discuss this and determine whether you want to make this shift or leave things as they are.

Take Action

No. 2 - Be Intentional

RECOMMENDATION

Resources and process are critical to successful communications. Intentionally and strategically determine your team, your workflow and your tactical plan.

Determine roles for your team and pull in content creators to help

Communications team members should understand what their role is in content creation outside of their job description. Typical roles include a chief content officer, who sets the overall editorial and content development mission and builds awareness of the team's purpose in the organization. Managing editors execute the work and make sure stories and content comes alive including tone, style guides and scheduling. Content creators are your writers and hands-on people who make the content and are constantly on the lookout for stories to tell (and they don't have to be formal communicators in your organization!).

Create a workflow process that you can see

Understanding how ideas come in, are assessed and assigned and then produced is a visual exercise. Mapping out a workflow process and working it daily, weekly and monthly can provide structure to the team, ensure consistency and allow for evaluation. This can be as simple as whiteboarding, an Excel spreadsheet on SharePoint, or free online resources such as Trello. The point is to be able to see ideas coming in and where they go in content creation and to align that to the tactical plan.

Create a tactical plan for content that includes:

An editorial calendar: Helps plan the topics you cover, keeps track of content assets as they move through your workflow and allows you to schedule publication.

Publishing guidelines: Documents your preferred editorial style representing your brand identity.

Channel plan: Governs how, when and on what platforms you will publish content.

Assemble a dedicated content team.

Be willing to evolve and innovate.

Understand what you are trying to accomplish with each tactic you are applying. Awareness? Engagement? Leaving a positive impression?

Operate like a newsroom and always have your "content" hats on.

In working with the community, prioritize your needs too—make it a requirement that they talk about you and share your messages.

Revisit your social media policies, both internal and external to ensure that they meet your needs.

Consider training—particularly media training for executives and Board Directors if appropriate.

Personalize whenever possible.

Use images of people instead of things.

When using people images focus on their faces and their eyes.

Be honest, open and authentic in your content creation. That may mean you are presenting controversial topics in a thoughtful manner. Doing so will build credibility.

Try parody and humor.

Take Action

No. 3 - Enhance Your People Focus

Prioritize communication that focuses on human interest stories and connects people to your service.

RECOMMENDATION

Give someone else the keyboard or the camera

Looking outside your communications team for content creators can greatly expand your authenticity and connection to your brand. Asking employees, customers, partners and other water industry leaders to write a short story, share a photo or create a 30-second video explaining a project can enhance your content and relieve the burden on communication staff.

Share human interest content across all platforms

Don't create specific content for employees and different content for external audiences—share it all, especially if it has a human-interest angle. Doing this will help consolidate all the content and material the Authority produces, enhance employee engagement and help eliminate the problem of frontline employees being the last to know about something you are promoting externally.

View employees as brand ambassadors

Quick, stand-up meetings with leadership or an all-hands team meeting biweekly helps provide a good foundation for being a great brand ambassador, as does requiring staff to read newsletters and communication materials (if they are easily accessible). Find opportunities to engage staff before, during and after a communications campaign or outreach project.

Let others help spread the message for you

Use your partners and your employees to help content flow into the community. This may require you to ask (sometimes repeatedly) for someone to share content or push your posts out. Doing so builds on your credibility asset and helps build cultural appropriateness.

Invest in brand photography

Have a professional photographer create a portfolio of images that are people-focused and culturally appropriate for the Authority's brand.

Take Action

No. 4 - Become Metric Driven

Goals and metrics should be built into your communications planning and reported so that you can demonstrate success and improve when needed.

RECOMMENDATIONS

Develop SMART goals

Creating well-written objectives that are Specific, Measurable, Attainable, Relevant and Timely requires time, orderly thinking, and a clear picture of the results expected from communication program activities. The more specific your objectives are, the easier it will be to demonstrate success.

SMART objectives make measurement and evaluation more effective. By having these objectives nailed from the start, the investment in communications can demonstrate a well spent effort.

Monitor your social media

Media monitoring is listening to who's saying what about the Authority, your industry, and any other topic that's important to you and your operations. Media monitoring lets you know if your efforts are turning into results. Only by tracking your coverage will you know if you're getting coverage; only by monitoring the media will you know if you're earning it.

Survey customers and employees

Understanding the importance of customer and employee feedback helps the communications team and leadership feel the pulse of consumer demand and understand customer priorities. Data generated from research and surveys helps you understand where you need to focus, and what you are doing well.

Valuable insights in areas such as customer responsiveness, service feedback and net promoter score (are your customers speaking positively about you? Do employees tell others that this is a good place to work?) along with a deeper understanding of water use habits, are some of the reasons to create and gather customer feedback data.

Get your website in order first—don't expand social media until you feel good about your website.

Tie metrics to employee performance evaluations.

If the Authority uses a dashboard for tracking strategic plan goals, include communications metrics in that.

Take Action

No. 5 - Demonstrate Cultural Appropriateness

Increase the cultural proficiency of Sweetwater Authority's communications in order to better engage more stakeholders from the diverse communities that it serves.

RECOMMENDATIONS

Professionally translate social media posts and highly visited web pages

Identifying and professionally translating the Authority's most visited web pages will make the service information and communications more welcoming and accessible to Spanish and Tagalog speaking customers and other stakeholders. Professional translation of the most viewed information communicates a commitment to service and respect for the customers it serves. Doing so deliberately on social media in Spanish, for example, can create an audience that both follows and trusts the Authority.

Ensure translations are culturally relevant and correct

Culturally relevant and correct translations demonstrate that the Authority cares to communicate in the customers' preferred language. It can build trust with these customers and stakeholders if properly done, but there is a big difference in quality between translations performed by professionally trained translators, translations performed by employees who may speak another language, and translations using Google Translate. Proficient translations communicate meaning in culturally appropriate ways that are routinely absent in verbatim translations by Google Translate. Although there may be immediate appeal to use internal employees to perform translations, the ability to speak another language does not necessarily mean that an employee has the proper linguistic training to translate meaning accurately, in a grammatically correct way, and consistently.

Continue to be present at cultural events and organizations

Good institutional citizens, whether public or private, are expected to support the communities that they serve. In the case of the Authority, this means being visibly present and partnering strategically, where appropriate, with organizations that reflect the diversity of the Authority's customers and other stakeholders. Presence, recognition, and outreach at these events is a clear sign of the Authority's commitment to its stakeholders and communities.

Conclusion

Overall, there are many communications programs, channels, and tactics that are going well for the Authority, and certainly stakeholder feedback was mostly positive. The Communications Team is to be commended for their efforts to support the organization's communication needs.

The areas of special focus are those where we think the communications team can make the most meaningful progress. The result of this work will be a comprehensive strategic communications master plan that will guide the agency's communication efforts into the future.

We appreciate the opportunity to work with the Authority and we valued the conversations and candid feedback that will help the agency as it moves forward with its strategic communications plan.

SPECIAL NOTE

The consultants were impressed by many of the communications efforts that the Authority is successfully executing. It's exciting to think about what this communications team will do with this information as they seek to continuously improve.

Appendix A

Sample Stakeholder Interview Questions

1. Tell me about your relationship and experience with Sweetwater Authority?

2. How often do you interact with the utility – daily, weekly, monthly?

3. When you think of Sweetwater Authority, what are the first three things that you think about?

4. Would you say that your overall feeling about Sweetwater Authority is very positive, positive, neutral, negative, or very negative? Is there anything in particular that gives you this feeling?

5. When you talk to others in the community about Sweetwater Authority, how do you describe the utility, its mission and purpose?

6. How well does Sweetwater Authority underline deliver on its mission and purpose? Is Sweetwater meeting expectations?

7. Is there anything Sweetwater Authority should do differently to deliver on its mission and purpose?

8. What three things do *you* think that Sweetwater *should* be known for?

9. If you had to pick *only one thing* about Sweetwater Authority for all its stakeholders to know, what would it be?

10. If you could do *one thing* to improve Sweetwater Authority' reputation, what would it be?

11. How do you receive information on Sweetwater Authority (third-party online sources, local newspapers, bill inserts, Authority website, word-of-mouth, local chambers, residential neighbors, local business customers, other)?

    a. Do you think that the amount of information that you receive about Sweetwater Authority is about right, too little, or too much?

    b. As a Sweetwater Authority stakeholder, what would you like to know more about Sweetwater Authority?

    c. Do you think that Sweetwater Authority communicates in linguistically and culturally appropriate way?

12. What do you see as potential barriers to Sweetwater Authority' customers and stakeholder engaging with the utility?

13. Do you know anyone who works for Sweetwater Authority?

14. What are your expectations of the **employees** of Sweetwater Authority?

15. Would your impression of Sweetwater Authority be more favorable, less favorable, or the same if you knew more about the people who work for the Sweetwater Authority?

16. What are your expectations of the **board of directors and senior management** of Sweetwater Authority?

    a. In your opinion, does the board of directors and senior management of Sweetwater Authority communicate sufficiently with other stakeholders?

17. Is corporate social responsibility something that is important to you as a stakeholder of Sweetwater Authority? From 1 to 10, 1 being not important at all and 10 being very important, how important is it to you that Sweetwater Authority:

    a. Support local schools and non-profits? [Follow-up]?

    b. Be committed to diversity and opportunity, in its employee ranks and in its supplier base?

    c. Be committed to sustainability in its operations and to be a good steward of the environment and its environmental assets, like dams, streams, wetlands, etc.?

    d. Participate in regional business organizations, like chambers and economic development organizations?

    e. Volunteer in the local community?

18. Are there opportunities for community outreach that Sweetwater Authority should be aware of?

Specific questions for Directors and Employees:

19. Why did you choose to work for (or serve on the Board of) Sweetwater Authority?

20. How do you contribute to Sweetwater Authority' mission and purpose—our promise to our customers and the environment?

21. What organizations or groups of people, generally, do you consider to be the stakeholders of Sweetwater Authority?

22. What do you think these stakeholders expect of Sweetwater Authority?

23. Tell me about your best day working for/serving as a Board Director of Sweetwater Authority.

24. If we were having this conversation three years from now, what changes would you expect in how our stakeholders *feel* about Sweetwater Authority?

25. Three years from now, what overall <u>*feeling*</u> would you hope that Sweetwater Authority stakeholders would have about the utility that they do not have now?

Appendix B

Stakeholder Interview Snapshot – Relationship with Sweetwater Authority

During our interviews with employees, Directors, and stakeholders we learned about how people relate to and feel about Sweetwater Authority.

PERCEPTIONS

Things that people think about Sweetwater Authority

- Water rates – one of the lowest in the county.
- Friendly working environment**,** innovation, reliability and transparency.
- Water supply, infrastructure, governance, employees and pipes.
- Good governance and great place to work.
- Uniqueness – the wells, the reservoir, etc.
- Efficiency and rapid response in case of emergencies.
- Good customer service.
- Water bill, good water quality. Safe water.
- Rates and drought/conservation.
- Governing board's actions.

"Positive. I think that I'm part of this organization. I have contributed to its success."

Overall feeling about the Authority

- Positive. However, it seems that some board members are divided. I would like to see more cohesion.
- This agency is by the people and for the people.
- Extremely positive. The way the Authority connects with the community is amazing!

Overall description of the Authority

- We are a water industry that serves the public. When I speak about the Authority I explain how we treat our water, why we have lower rates, where water comes from. Our mission is to serve the best water, the best product. We are the most respected water agency in San Diego.
- I think our mission is to provide safe and reliable water at a fair price.

- The Authority is a very innovative agency, especially in education, careers in water, supporting the community and kids. They are allocating resources and facilities to push forward water careers.
- We are not the school district.

Things that can be done differently to deliver on the Authority's mission and purpose

- The Authority delivers very well its mission but we need to improve and elevate the agency. We can do better. We need to elevate and improve the customer experience. We want to "WOW" our customers.
- The Authority should be a customer driven agency. Customers should be number one.
- I think we should have more customer engagement. We need to build relationships with clients. Maybe sending a text when customers consume more water. We can send a message: Do you want to check for leaks? Best water saver of the Year? More social media. Featuring customers that conserve water.
- Maybe they should talk more about the infrastructure projects that they are working on. Sometimes people are not aware of things that may affect them (related to master plans, rates, etc.). Public should participate in these discussions.

What the Authority *is* known for

- We are known for being progressive and problem solving. We advance social causes like the Hydrostation.
- Blue giveaways – sponges for example, the big water tank and the white trucks.
- The Authority is known for being the place where people pay their bill, where people get their water and the reservoirs.
- The Authority is known for the Desal Plant, the bills are separate (potable and sewer) and the dam.
- The Authority is known for its partnerships – helping the community and kids.
- The Authority is known for being a utility that is trying to keep low rates.

The Authority should be more open and transparent. The more we keep people informed the better it is for everyone.

We connect to people; we are not just a "pipe."

Promote "tap water." It has to be culturally and linguistically adapted to the community it serves.

The Authority *should* be known for

I think they could have a more proactive approach. Get input more often from the community (like this interview!). Provide more updates that help execute their mission.

- Innovation. An agency with opportunities for women, minorities, and LGBT people. Also a service oriented organization thinking as a business.
- We should be known for being an agency that is expanding its infrastructure.
- Having the best customer service and engineering,
- Quality of our infrastructure. We don't have leaks.
- Sweetwater should be known for being an agency that is involved in the community that they serve. Keep our resources within its territory, a pillar in the community.
- We should be known for the fact that we are one of agencies with the highest conservation rates.

Reputation

- Our reputation is that we are not responsible for our ratepayer's cost of water, cost of doing business, cost of employees.
- The Authority has a good reputation, however, they could be more proactive providing updates to the community.
- To improve its reputation the Authority should invest on employees: hiring the best, well educated people. Provide educational tools. Provide equipment and technology.

Additional comments

- We should have an employee recognition strategy. We should have photos about the history of the infrastructure like the dam.
- The Authority makes a big effort to communicate the public its mission. We do door hangers, social media, etc. We had done everything to reach out to people. Sometimes people do not want to be reached.
- I think that we need to put customers first. This should be our main focus, value our customers.

Appendix B

Stakeholder Interview Snapshot – Sweetwater Authority Communications

During our interviews with employees, Directors, and stakeholders we learned about how people interact with Sweetwater Authority communications.

PERCEPTIONS

How stakeholders receive information

- I receive information about the Authority through email. I check my email three times a week. The amount of information that I receive about Sweetwater Authority is just right. I would like to receive information about board meetings, management's plan on hiring, projects, etc.
- Social media, newspapers, and word of mouth from community members.
- I receive information about the Authority through Twitter. The level of information is just right. It could be helpful for the Authority to share information via text (when there is an emergency).
- I receive information about the Authority through management (e-mails and Coffee with the GM), Communications Department's newsletter.
- Through my water bill/inserts and social media.
- I receive information through other employees, weekly staff meeting (this is very effective). I don't read the newsletters. I check my emails 3 to 4 times a week. We don't have access to Internet. I don't have social media. The information I receive is just right.
- We need to go paperless and build a new relationship through the digital era. Text messaging is excellent.

What stakeholders would like to know about Sweetwater Authority

- I would like to know more about what the Authority is doing every day in National City (what projects are they working on).
- I would like to know about water saving programs, rebates and financial incentives. Receiving the information through email would be helpful.

Through employees, staff meetings (weekly), and social media. I think we should have one newsletter for the whole agency. This will reduce staff time and repetition of the same information.

I receive information through the newsletter. The newsletter is very business looking. I think it needs to look different.

- I would like to know more about future plans, the Strategic Plan for the next 10-20 years.
- Knowing about how we rank among other agencies would be helpful.
- I like to get more information about a succession plan. 40% of our staff will be retiring. This will be an opportunity to hire the best people and, at the same time, mentoring our own staff.
- I would like to know how the board functions. A run down on how the board works would be helpful.

Communications: Language and Culture

- We need bilingual executives. However, it doesn't mean that we don't communicate in Spanish.
- I think that we are seeing more diversity in the staff. That's good. We can still do better.
- Regarding culture I think that we are doing a good job going to fairs to reach out to Hispanics, Filipinos, etc.

Barriers

- One of barriers for Sweetwater Authority's customers to engage with the utility is "Rates." Some customers do not have the financial means to pay. Communicating to people why they are using less, and the bill continues going up would be helpful.
- I think that having a diverse population (age) makes communications difficult. Some of our customers do not engage on social media. Some young people will never open an envelope.
- One of the potential barriers for customers to interact with the agency is the media. Bad press doesn't help. However, if SWA gets closer to the community they can share their own story.
- A potential barrier can be lack of transportation. Some of our customers can't attend our meetings or special events.
- People do not engage with the agency enough because they mistrust of utilities/government. Excessive Taxation makes people not to trust, clients are frustrated.

"We are not reaching out to low-income seniors. We are focusing on social media, but they walk into our office all the time. They tell us they can't pay their bill. We need to work on this"

Appendix B

Stakeholder Interview Snapshot – Expectations of Sweetwater Authority

During our interviews with employees, Directors, and stakeholders we learned about what people expect from Sweetwater Authority.

PERCEPTIONS

Expectations of the employees of Sweetwater Authority

- As an employee we expect to have a safe place to work, an organization run with integrity.
- Professionalism with co-workers and the public.
- One of my expectations is to have the right equipment and tools to use in the field.
- I think that the Board of Directors and senior management communicate very well with the stakeholders.
- I think that Board Members do not communicate sufficiently with other stakeholders.
- Our job, as board members, is to disseminate the information. If we had three bullet points to take home after every meeting at the Authority, we could brief our colleagues and friends.
- I expect that all employees provide the best customer service.
- I expect the board to work as a unit. We need to make decisions keeping the customers in mind.
- I think there was a lack of engagement between the cities, Otay Water and other entities but we made some progress. The city is moving forward, and we are not involved sometimes with them. We need to improve that.
- My impression about the Authority would be more favorable if I knew more about the people who work for Sweetwater Authority.
- My impression about the Authority would be more favorable if the people I knew were from National City.

Corporate social responsibility

Corporate social responsibility is something that is very important to all the participants.

Final ranking:

> # 1 - Be committed to diversity and opportunity, in its employee ranks and in its supplier base.

2 - Be committed to sustainability in its operations and to be a good steward of the environment and its environmental assets, like dams, streams, wetlands, etc.

3 - Support local schools and non-profits.

4 - Volunteer in the local community.

5 - Participate in regional business organizations, like chambers and economic development organizations.

Community Outreach opportunities

- The Authority should participate in sports events. Maybe marathons. We can provide water there.
- We should get involved in PTA's groups, religious organizations (festivals). Do more grass roots events.
- I suggest the Authority should get involved in the Chula Vista Monopoly Game.
- I recommend the Authority to continue participating in the Chula Vista Parade.
- The Authority should have more booths at events. Sponsor more galas for non-profits to gain visibility.

Appendix B

Stakeholder Interview Snapshot – Sweetwater Authority Directors and Employees

Our interviews with Directors and employees were insightful.

PERCEPTIONS

Choosing Sweetwater Authority

- I choose to work for the Authority because water is a great career to be in. Water is not going anywhere. I like the water industry. I like to learn new things. I'm taking a training.
- To make sure that we will be successful. We don't want to continue doing business as usual.
- It is my duty to represent my community.
- The Authority is a good place to work. I have a good job.
- The Authority has a good reputation.
- I like having a job that serves my own community. I'm proud of my job. It is close to home. Benefits are great.
- To give back to the community.
- The Mayor appointed me.
- I like public service.
- I was recruited to provide good governance. I wanted to help. I'm strong in infrastructure.

Contribution to the Authority's mission

- Maintaining infrastructure, fishing activities, making sure that people obey regulations to keep our water quality at Loveland and Perdue.
- Besides the duty of being an elected official I want to advance issues about diversity and inclusivity.
- Serving the public. Providing good customer service.
- By always putting our customer first in my decisions

Stakeholders of Sweetwater Authority

- I think other water districts are our stakeholders.
- Ratepayers are our stakeholders.

- Residents, community groups, regional government and employees.
- Board members and customers.
- Local cities, county, businesses and ratepayers.
- Local businesses, corporations, local government, everybody with a water meter.
- Civic organizations, chambers of commerce, rotaries, optimists, businesses, homeowner associations, and apartment buildings.

Stakeholder Expectations

- Stakeholders expect a well-run organization working with integrity to meet its mission.
- They expect an effective organization that interacts well with the community.
- Honesty, transparency, fairness and they are asking us to listen to them. Be more engaged.

Changes expected

- In three years from now I hope that we can have a website in many languages.
- More technology. The public more aware of what we do here. Why they pay the amounts/rates they pay.
- A fully integrated communications team that tells the community why we are so good.
- I would like to see customers aware of our water resources, reliability of our systems and our commitment to water quality. You can drink "tap water."
- Excellent customer service. The best one. Achieving our main goals. One goal per year.
- People take the bus to pay the bill. Make them feel like they are family.
- Since I don't recognize a big problem I want to continue doing the good job, so no more changes.
- I would like our customers to think of us like a household name. People don't know what a water district is. They do not know who their board representative is. People need to know about the rebates and services that the Authority offers.

Customer Survey Summary

Appendix C

Survey of
Sweetwater Authority Customers

Prepared for

Sweetwater Authority

March 18, 2015

P R B E

RESEARCH INC.
...for what you need to know.

SINGLE RESIDENTIAL EXECUTIVE SUMMARY

Awareness Issues

- More than eight-in-ten residents of Sweetwater Authority's (Authority) service area are aware of the organization's identity as their household tap water provider. This suggests little need to raise public awareness of the Authority's presence.

- There is far less awareness, however, of San Diego's *Water Conservation Garden*. Only about one-half of area residents have heard of this attraction; and of those who had, only one-in-four had visited this site at some juncture. Residents of the Bonita area were the most likely to have visited the attraction.

Water Consumption

- Residents of the Authority's service area are heavy bottled water (individual and bulk format) consumers at home, as bottled water is more commonly mentioned as the main source of household water consumption than tap water. Nearly one-half of respondents consume bottled water primarily, compared to one-third who take their drinking water straight from the tap. One-in-five residents of the Authority service area consume a combination of the two.

- By comparison, Americans across the country tend to consume tap water over bottled water as shown in a 2014 Probe Research study of 2,000 U.S. residents.

Billing Issues

- There is broad usage of various options available for Authority customers to pay their water bills. One-in-four pay their bills by mail or online, and about one-in-five make payments in-person or by auto-pay.

- How the Authority customers pay their bills, however, is poised to continue changing over the years ahead. Even based on small sample sizes, there is a noticeable tendency for younger generations to opt for online bill payment instead of bill payment by mail. In-person payment, meanwhile, continues to be the single most commonly used option among renters, suggesting this remains an important service for a significant proportion of Authority customers.

- Customers are broadly satisfied with their ability to understand the Authority's water bills and its content, including four-in-ten who are *very satisfied*.

Value and Cost

- Authority customers solidly agree that the high cost of water is a strong incentive to conserve this increasingly valuable resource. Less unanimity was expressed, however, on the matter of whether or not the existing product represents good value for money or if it will be necessary to increase rates in the future.

- Area residents expressed mixed views in terms of satisfaction with the current cost of their household water supply, with equal proportions expressing satisfaction and dissatisfaction. Dissatisfaction with water cost was noticeably higher among not just higher volume consumers, but also among the more affluent customer group.

Conservation

- Almost all customers reported taking action in their homes to deal with the ongoing drought conditions in Southern California.

- Three-in-four Authority customers know where to go should they be seeking information on water conservation.

- The Authority's toilet rebate, clothes washer rebate and landscape audit programs are known to less than one-half of Authority customers. The toilet rebate program was the most widely known of the three (familiar to just less than one-half of respondents), while the other two programs were each known to about one-in-three customers.

- Based on the number of customers reporting both awareness and use of each program, the toilet rebate program has been the most successful program - accessed by about one-fifth of customers. The clothes washer rebate and landscape audit programs have each been taken up by about one-in-ten respondents.

- Those who have never had any interaction with these programs were, by and large, simply not interested or not familiar with them.

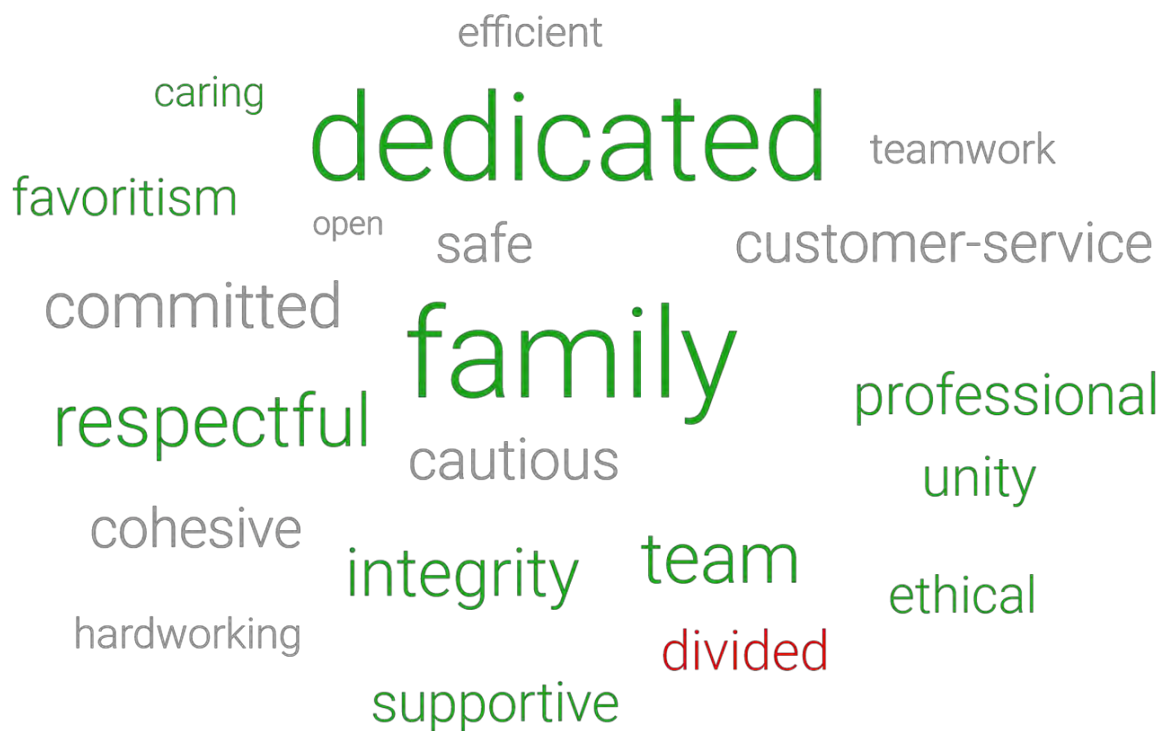## Satisfaction with Water Quality & Authority Services

- Three-quarters of Authority customers report that they are satisfied with the quality of water provided by the Authority.

- Among those who expressed some level of dissatisfaction with the quality of their household water, two-thirds were unable to describe why they were dissatisfied. There were isolated reports, by about one-in-ten dissatisfied clients in each case, that their households had hard, foul-smelling or 'contaminated' water. A few also expressed concerns about fluoride or chlorine in their household water.

- While only about one-in-ten customers were dissatisfied with the services they receive from the Authority overall, the remainder were equally divided into those who expressed high levels of satisfaction with the Authority and those who had no strong opinion one way or the other.

Customer Contact

- Among the one-third of respondents who have had personal contact with the Authority during the past year, two-thirds were *very satisfied* with the service provided.

- Common reasons for contact included making bill payments, seeking rebate information, calling with general inquiries and clarifying the information on their water bills.

- Customers favored three methods for communicating important information: direct mail, e-mail and, if necessary, telephone.

- An impressive four-in-ten customers had visited the Sweetwater Authority website at least once. Reasons for visiting the website included making bill payments, looking up payment options, and seeking conservation, program or rebate information.

- Only one-half of customers were aware of the *Water Conservation* Garden in El Cajon. Of these customers, only one-in-four – or slightly better than 10 percent of all Authority clients – had actually visited this attraction.

- When offered the opportunity to volunteer words of advice to the Authority, the most common suggestion was simply a request to lower the costs they pay, an idea offered by one-in-four respondents. Other suggestions were offered by one-in-ten respondents or less.

Appendix D

efficient

caring

dedicated

teamwork

favoritism

open

safe

customer-service

committed

family

professional

respectful

cautious

unity

cohesive

integrity

team

ethical
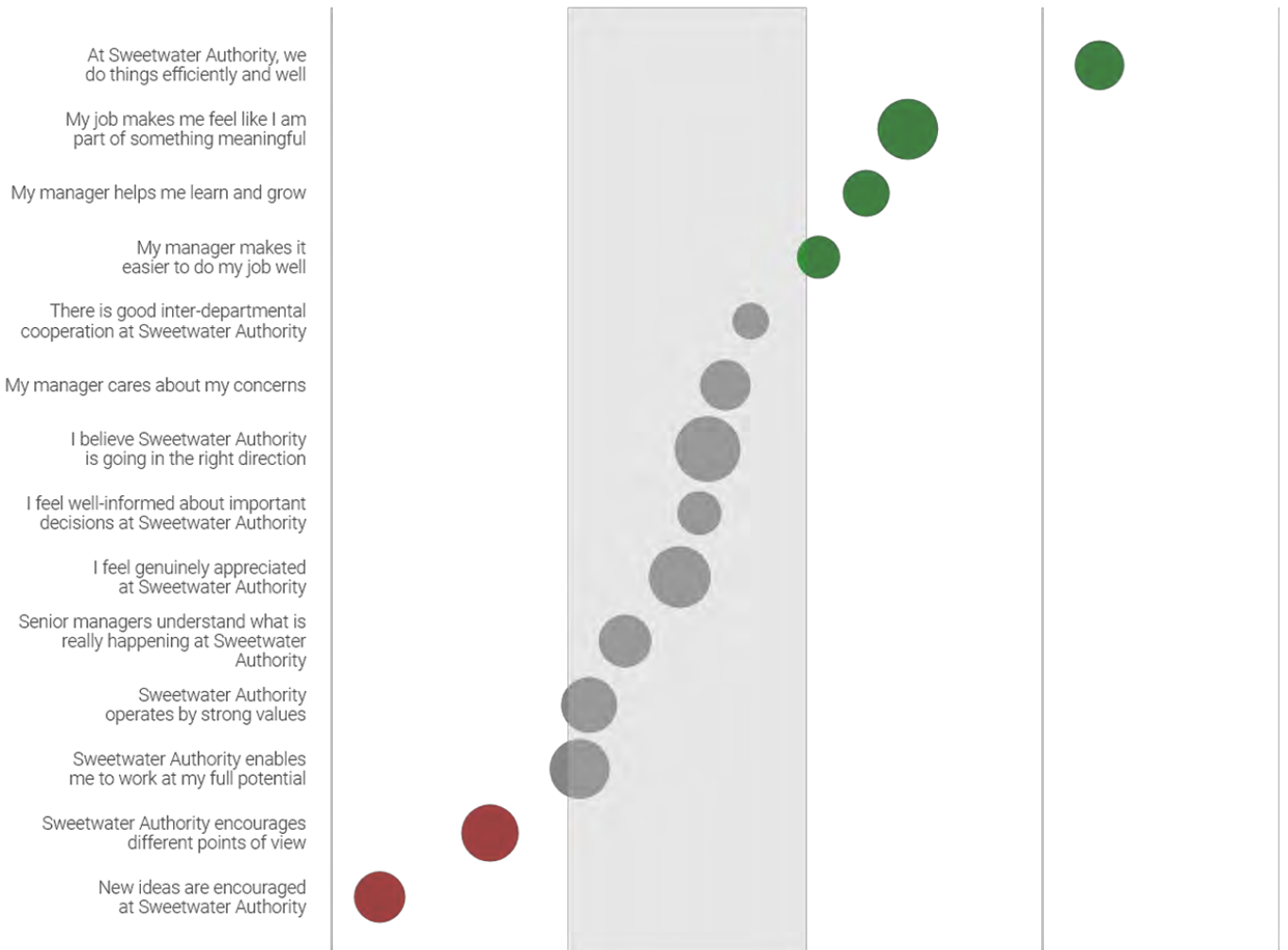
hardworking

divided

supportive

Highlights from the executive summary of the August 2018 employee survey conducted at Sweetwater Authority.

121 employees were invited and 86 responded (71%).

This chart shows the survey statements sorted by score from most positive on the top to most negative on the bottom.

Scores in the green to right of the gray box are above the 60th percentile of the benchmark.

Scores shown in red to the left of the gray box are below the 40th percentile of the benchmark.

At Sweetwater Authority, we do things efficiently and well

My job makes me feel like I am part of something meaningful

My manager helps me learn and grow

My manager makes it easier to do my job well

There is good inter-departmental cooperation at Sweetwater Authority

My manager cares about my concerns

I believe Sweetwater Authority is going in the right direction

I feel well-informed about important decisions at Sweetwater Authority

I feel genuinely appreciated at Sweetwater Authority

Senior managers understand what is really happening at Sweetwater Authority

Sweetwater Authority operates by strong values

Sweetwater Authority enables me to work at my full potential

Sweetwater Authority encourages different points of view

New ideas are encouraged at Sweetwater Authority

Appendix E

Materials Review

A review of Sweetwater Authority print and online materials was conducted by the consultants. The team spent time assessing branding, messaging and overall impact of the materials submitted by Sweetwater Authority.

The following recommendations were made after reviewing samples of Sweetwater Authority's print and online materials:

The materials created by the Authority where thorough, and featured concise writing, but lacked brand consistency, including improper use (or lack) of Sweetwater Authority logo, color palette, and fonts. Given the direction of the utility expressed in it's 2017 Strategic Plan, interviews with key leaders and directors of the organization and employee feedback, the brand itself does not seem to reflect the forward-thinking, customer-focused utility that Sweetwater Authority sees itself as.

To establish consistency across all utility materials, it is recommended that the Authority develop a set of brand guidelines, and enforce them.

The brand guidelines should consist of the following:

- Logo (and uses of)
- Tagline (and uses of, with or without logo, etc.)
- Color Palette
- Typography
- Suggested use of photography
- Messaging that reflects the brand personality/driver

Once these guidelines are created it is advised that they be posted, and a process be established to enforce the use.

RECOMMENDATIONS

- Develop a content marketing process that identifies a content development flow and creates an editorial calendar to ensure efficient, effective use of content. The editorial calendar should include targeted pitches to the news media that you want to proactively communicate about
- Develop a consistent format for flyers and fact sheets by using a template
- Define and streamline the purpose of flyers and ads. This seems to be a frequent activity, but is it effective?
- Review the need for hard copy brochures for water service and water efficiency

- Evaluate the value of contests, how many people participate, what is the reach, how many staff resources are needed to manage?
- Once brand guidelines are established, the customer newsletter needs a facelift and consideration should be given to inserting it in every bill, not just quarterly.
- Consider outlining a policy for customer notifications: when will you mail information related to construction projects to make sure you are consistent, and customers receive information in a timely manner?
- Consolidate employee newsletter, sustainability tips and safety tips into one weekly/monthly newsletter, distributed digitally to all employees by email and in a hard copy format to field employees.
- Make sure all materials that go out to external audiences are provided to employees first.
- Ensure bill messages on the printed bill are also available through the online bill portal
- Make sure all material produced (ads, flyers, fact sheets, etc.) is available under the associated topic area on the website
- Consolidate email signatures. Options can be provided, but they should be standardized and not be edited for personal preference (i.e. colors, addition or removal of contact info, etc.)
- PowerPoint template should have the same look and feel as standard fact sheet/ad templates
- Incorporate alerts, news flashes and board information notices into the editorial calendar to ensure these are being consistently used
- Ensure that all printed material has a date on it and a plan in place for evaluation to make sure it is still current. In a sense, all printed material has an expiration date—keeping track of what is out there in a spreadsheet and regularly bringing material in for a refresh will keep printed items current.

Appendix E

Social Media and Website Review

The following recommendations were made after reviewing samples of Sweetwater Authority's website and social media:

A review of the Sweetwater Authority website and social media channels was conducted by the consultants. The team spent time assessing branding, messaging and overall impact of the materials submitted by Sweetwater Authority.

WEBSITE

Sweetwater.org appears to be kept up to date and the information contained is relevant to customers. The Authority is to be commended for this, in benchmarking against other utility websites, sweetwater.org shows good website stewardship and the site does not appear to have become the repository for every little piece of information ever created.

Generally, the website's navigation works for the user if you view it on a computer, but when viewed on a mobile device, it is lacking. Mobile device website traffic now exceeds use on a computer and is even more prevalent in communities with a high Latino population. A 2016 Pew Research Center data shows that 94 percent of Latino internet users access the internet from a mobile device. When accessing sweetwater.org from an iPhone, only the search bar and an image are shown.

Imagery and the use of video is also limited on sweetwater.org. Images shown are almost entirely of source water. Given the Authority's understanding that its customers prefer bottled water, providing images of people interacting with drinking water would be a better connection to the service the Authority provides, and its tagline: "providing safe, reliable water."

On a related note, although the site has the ability to use Google Translate, given the community Sweetwater serves, a higher-level effort could be made to provide a mirror site with professionally translated materials for the most sought-after pages.

SOCIAL MEDIA

The Authority uses Facebook, Twitter, Nextdoor and YouTube as it's primary social media channels. The Authority has recently been investing in digital campaigns, which have been successful in meeting their goals.

Although there is not much engagement in the four social media platforms, the Authority has developed policies for how they will interact on the platforms and their Twitter following contains mostly news media and water-related agencies and organizations, which is an appropriate mix.

RECOMMENDATIONS FOR SWEETWATER.ORG

- Make the site work on a mobile platform
- Professionally translate portions of the website into Spanish to accommodate this need in the community and enhance perceptions of the Authority's cultural appropriateness
- Post customer newsletters in an easily accessible location (could not find them anywhere and when search was used the site requires a "request" online form—that is too much work for the consumer)
- Reconsider the use of an email subscription service for alerts. Can this be handled in a different, more effective way?
- Revisit the construction projects site to offer more up to date, relevant information to customers.
- Add strong visual interest that includes brand imagery of your employees and customers.
- Emphasize the excellent drinking water the Authority produces over source water.
- Dive into your website analytics to determine what's working, and what's not. Consider eliminating pages that receive very little consumer attention.
- Consider the use of a newsroom where links in social media can point to. This also would be helpful during a crisis.
- Vastly increase the use of videos.
- Consider cutting content on pages to reduce scrolling.

RECOMMENDATIONS FOR SOCIAL MEDIA

- Adopt a content marketing philosophy and develop a social media plan that coordinates with the editorial calendar to ensure all content is being used, consistently shared and coordinated with related content as appropriate.
- Develop a policy for the communications team to ensure that social media platforms are monitored after hours and on weekends.
- Links in social media seem to point back to the social media site. They should be pointing back to the information on your website. This seems to be predominant on Facebook. For example, a post about the fishing program at Loveland Reservoir contains a link but it doesn't go to information about Loveland Reservoir on sweetwater.org. Instead it's a reference to @swawater.
- Use original images almost exclusively. Images and videos don't have to be professionally produced but should be representative of the Authority. There is too much use of stock images.
- Vastly increase the use of videos.
- Consider adding Instagram to the Authority's social media suite. Instagram is growing in use and for some key audiences in the Authority's service area this is the social media platform of choice.
- Post material in Spanish regularly. Doing so will boost credibility with consumers. Content should be professionally translated.
- Increase the use of digital campaigns to reach targeted audiences.
- Set specific goals and metrics for your social media platforms
- Develop a channel plan that governs how, when and on what specific platforms you will publish content and determine the rules of engagement.
- Use Nextdoor for construction information in a geographic area. Since the Authority currently cannot email or text customers, this may be the only way to contact customers outside of direct mail and door hangers.

- Revisit the Authority's internal social media policies regularly to ensure they cover the basics and the things that crop up on occasion such as how to handle employees' and board directors' use of social media
- Consider the development of a risk communication plan that has a strong social media component. Today utilities experiencing a risk communication challenge will be handling it almost entirely through social media. How would Sweetwater Authority respond if it was suddenly inundated by hundreds of social media inquiries due to a water quality concern?