

PUBLIC AFFAIRS
STRATEGIC PLAN

2022-2024

Public Affairs Strategic Plan FY 2022–2024

Introduction

The Orange County Sanitation District's (OC San) Public Affairs Office (PAO) is responsible for creating, organizing, and disseminating all internal and external communication. The primary objective of the PAO is to deliver messages that are accurate, transparent, and designed to foster public trust and confidence. An integrated Public Affairs Strategic Plan is essential to deal effectively with the variety of audiences we serve.

The PAO staff provides services and tools and implements programs to meet the communication needs of several audiences for OC San. This includes planning and implementing media relations; website and intranet site content; construction outreach; elected officials and government relations; internal communications, education, and outreach; and graphic development.

The PAO has created a Strategic Plan for Fiscal Years 2022 - 2024. This Plan is developed based upon the principles of OC San's Mission of protecting public health and the environment and will support the implementation of OC San's Strategic Plan. This Plan offers a vision to unify our communication efforts and focus resources to achieve the greatest impact and greatest results. This plan was created as we are in the process of recovering and moving into our new normal post the COVID-19 pandemic. At the creation of the previous PAO Strategic Plan, it was impossible to project the length of time that COVID-19 would impact our lives and operations, as such some items are carrying over to this new plan. Because much of what is planned and created by this group is based on external factors and therefore outside of our control, flexibility and fluidity is integrated into the plan. The PAO will follow the guidance set forth by management and the Board of Directors to carry out OC San's messaging and support our member agencies.

Background Information

OC San represents 20 cities, 4 special districts and a portion of the unincorporated County of

Orange. This area represents a community of 2.6 million people with approximately 550,000 customer accounts.

Unlike most public agencies where there is direct contact with customers, at OC San, billing occurs through the County of Orange property tax bills. Therefore, OC San must work through other means to communicate with the public and the rate payers. We have a 25-member Board of Directors, and over 600 employees within six departments with various goals and objectives. While these groups work independently on a variety of projects, the goal of the PAO is to provide support and messaging that is consistent throughout the agency so that we are one voice, representing the same overall goals, and portraying the same brand.

While there are many challenges with serving such a large and diverse customer base, there are also great opportunities working through the strategies laid out in this Plan.

Public Affairs Team

The division is staffed with six full-time employees and overseen by a manager.

- **Jennifer Cabral**, Administration Manager
- **Daisy Covarrubias**, Principal Public Affairs Specialist
- **Rebecca Long**, Senior Public Affairs Specialist
- **Kelly Newell**, Public Affairs Specialist
- **Belen Carrillo**, Public Affairs Specialist
- **Gregg Deterding**, Graphics Designer
- **Cheryl Scott**, Administrative Assistant

Each of these team members carry out specific functions to meet the communication goals and objectives laid out in this Plan.

Situation Analysis

- The world is attempting to recover from a pandemic and return to a sense of normalcy, though identifying what - that remains to be seen. However, OC San has been able to continue with its operations and meet the mission of protecting public health and the environment.
- While operations continue for OC San, the business functions have been modified to meet the health and safety guidelines established.
- To ensure the safety of our critical on-site staff, approximately 50 percent of staff have been working remotely for the last two years. As stability with the health crisis is reached, telecommuting staff is beginning to return on-site. Communication methods have and will continue to address the varied audiences, work schedules and work environments to maintain open and transparent communications.
- OC San is concluding a five-year rate program, with a rate study about to begin. Public communication must factor in the financial impacts to the OC San rate payers as decisions and communication is made regarding proposed fees for the next five years.
- OC San has seen a high number of retirements this year resulting in significant personnel movement and new hires. Communicating OC San's culture and reinforcing the importance in relationships are essential to the effectiveness and functionality of the agency.
- OC San experienced high turnover in the Board of Directors in 2021. Continuous engagement with the Board Members is critical for the success of this agency.
- As an essential service, OC San has continued to execute the Capital Improvement Program (CIP) to keep the regional projects on schedule that are enhancing the regional sewer system throughout the service area. In the next two fiscal years, OC San plans to award 28 construction contracts worth a total of \$400 million.
- In partnership with the Orange County Water District, OC San is constructing facilities to complete the final expansion of the Groundwater Replenishment System (GWRS). Once completed, OC San will be able to recycle 100 percent of the reclaimable flow and allow GWRS to produce enough water for 1 million people.
- OC San is constructing a new administrative headquarters building in the City of Fountain Valley across the street from Plant No.1. The project will allow OC San to consolidate administrative staff into one building thus creating additional space for process facilities in the plant. The building is designed to be welcoming and inviting to the public. The main entry plaza will feature educational exhibits highlighting OC San's mission of protecting public health and environment.

Mission

The Public Affairs Office is committed to communicating information about OC San in a timely, accurate and accessible way to the employees, the Board of Directors, our member agencies, the public, and the news media.

- We are committed to open, honest, clear, and respectful two-way communication with our audiences.
- We are dedicated to informing others about how OC San serves the public and protects the environment.
- We are committed to outstanding customer service by responding to requests quickly and efficiently.
- We are dedicated to teamwork and collaboration as well as being creative and taking the initiative to be out in front of issues.

Audiences

This Public Affairs Plan focuses largely on four primary audiences.

- **Internal**

- Board of Directors
- Executive Management Team
- Employees
- Retirees

- **The Public**

- Ratepayers
- Member Agencies
- Residents, Businesses, Commuters Impacted by OC San Construction and Maintenance
- OC San Neighbors near our facilities (plants and pump stations)
- Schools and Students
- Tour Groups

- **Industry**

- Water/Wastewater Agencies
- Trade Organizations
- Trade Media

- **Influential Public**

- Local, State, and Federal Elected Officials
- Environmental Groups
- Local Media

- OC San is dedicated to exceeding wastewater quality standards used for resource recovery.
- OC San is committed to proper planning to ensure that the public's money is wisely spent.
- OC San's assets are monitored and evaluated regularly to ensure top performance and timely replacement.
- OC San values communicating our mission and strategies with those we serve and all other stakeholders.
- Providing reliable, responsive, and affordable services in line with our customer needs and expectations is a top priority for OC San.
- OC San focuses on creating the best possible workforce where safety, productivity, customer service, and training are a top priority.
- OC San has worked very hard to create an integrated planning environment which begins with the expectations of its Board of Directors and flows down to the work product of each employee. We have worked hard to assure our staff members are communicating and providing transparent services to each other in support of the plan.
- OC San has developed an integrated Planning/Asset Management system that allows for intentional, thoughtful decision making to maintain current operations while adding resilience and meeting new challenges.
- OC San has an organizational structure with informal relationships between employees that allow for collaboration toward common goals.

Agency Key Messages

- OC San is committed to protecting public health and the environment by providing effective wastewater collection, treatment, and recycling.
- OC San is more than a wastewater treatment facility; we are a resource recovery facility making use of all our byproducts.

Public Affairs' Goals for Fiscal Year 2022/23 and 2023/24

1. Optimize communication with our internal audience including those operating in the field.
2. Continue to build OC San's reputation as infrastructure leaders in the wastewater and resource recovery industry.
3. Cultivate relationships with traditional and social media journalists and influencers to promote OC San's programs and initiatives.
4. Enhance OC San's image and branding by utilizing proper messaging in external communication pieces such as OC San's website, presentation, digital media, and advertising. Maintain a positive experience and image for our visitors.
5. Identify and implement avenues for education and outreach within OC San's service area to further promote OC San as a resource recovery agency, promote OC San's mission and promote career opportunities within the wastewater industry.
6. Develop and implement outreach programs that will engage the communities affected by OC San's construction projects.
7. Ensure proactive engagement in legislative advocacy efforts that could impact OC San and the wastewater industry.
8. Monitor, track, and apply for grants available and that make business sense to OC San.
9. Ensure that local elected officials, member agencies, stakeholders, and OC San Board Members are actively engaged in the work of OC San.
10. Ensure the Public Affairs Office serves as the primary spokesperson for OC San during normal business and crisis scenarios and facilitates the dissemination of information.

To achieve these goals, the PAO presents the following strategies and tactics, along with the primary staff assigned to that area. While individual staff members are the key contacts for each of the goals, the team works collectively and collaboratively, reflecting our core values. Our staff recognizes the key role we play at OC San, not only communicating information, but also teaching and consulting others and serving as a resource to our Board of Directors, employees, the wastewater industry, and our member agencies.

As we navigate through the pandemic recovery efforts, the team will follow this plan, and make necessary modifications to effectively communicate OC San's strategic direction. Flexibility is implemented into this plan to deal with the dynamic situation we are all in.

Public Affairs Strategies and Tactics

1. Category: Employee Communication

Program Manager: Rebecca Long

Program Coordinator/Support: Kelly Newell, Belen Carrillo, Gregg Deterding, and Cheryl Scott

Goal (what): Optimize communication with our internal audience including those operating in the field.

Objective (measure): Create employee engagement by utilizing the identified communication methods to share agency wide messages.

Strategy (why): We value open and honest communication with our employees. PAO is committed to various efforts aimed at keeping OC San employees informed about important topics, increasing the overall quality of communications to our employees while tying the business aspects of the agency with the human-interest side.

Tactics (how):

- Keep information on The San Box homepage current, relevant, and useful for OC San employees by working with the various departments to gather information that should be shared.
- On a regular basis, staff will continue to support various departments with their communication and outreach needs.
- PAO will produce six Pipeline newsletters per year with a goal of circulation by the third week of the publication month.
- PAO will track Volunteer Incentive Program (VIP) points for all participating employees and coordinate the VIP appreciation celebration.
- Create employee recognition and celebratory events throughout the year that comply with health guidelines, this may include small in-person gatherings and virtual events. To include but not limited to the Annual Holiday Lunch, the Harvest Festival, and VIP Celebration, etc.
- Commemorate OC San's achievement of reusing 100 percent of the reclaimable flow upon completion of the Groundwater Replenishment System's Final Expansion. Celebrate the milestone and acknowledge the accomplishment with staff and stakeholders.
- Continue with the Honor Walk program which acknowledges retired staff and past Board Members for their contribution to OC San. The recognition event will be hosted every other year starting in 2023.
- Write and coordinate the 3 Things to Know email blast to be distributed to all staff each Monday.
- Produce monthly Digester bulletin.
- Support and promote OC San "U", OC San's training program.

2. Category: Industry Experts

Program Manager: Daisy Covarrubias

Program Coordinator/Support: Kelly Newell, Gregg Deterding, and Cheryl Scott

Goal (what): Establish and solidify OC San's reputation as infrastructure leaders in the wastewater and resource recovery industry.

Objective (measurable): Increase participation in strategic organizations through conferences, networking activities and awards by five percent.

Strategy (why): To build positive public perception and confidence among our various audiences.

Tactics (how):

- Encourage participation and presentation in conferences
- Encourage and support award application submittals
- Publicize and coordinate award acceptance logistics
- Track all awards won by OC San by keeping a master list
- Track and promote staff abstracts, and publications

3. Category: Media Relations

Program Managers: Daisy Covarrubias and Rebecca Long

Program Coordinators: Kelly Newell, Belen Carrillo, Gregg Deterding, and Cheryl Scott

Goal (what): Cultivate relationships with traditional and social media journalists and influencers.

Objective (measurement): Increase media coverage with positive stories about OC San.

Strategy (why): While a presence in the community is important to putting a face to our agency, media (traditional and social) is equally important with a broader reach and a more direct line of communication.

Tactics (how):

- Annually update media list to stay current and fresh.
- Develop a press kit to be online and interactive.
- Build a calendar of news release topics of interest to the public and stakeholders
- Invite media for a facility tour (virtual or small group). – Rolling over to new plan as unable to complete due to COVID—19 restrictions.
- Develop media strategies for important events, decisions, or actions. e.g. CIP Campaign (see details in Category 6: Capital and Maintenance Outreach.
- Conduct media training for Board leadership, EMT and key staff members. - Rolling over to new plan as unable to complete due to COVID—19 restrictions.
- Weekly (3-5 times) social media posts about the happenings at OC San with focus on OC San's accomplishments and mission.
- Continue with social media campaigns #OCSanAtWork, #What2Flush, and those currently supporting ongoing efforts.

4. Category: Agency Branding and Messaging

Program Manager: Daisy Covarrubias

Program Coordinators/Support: Gregg Deterding, Kelly Newell, and Cheryl Scott

Goal (what): Enhance OC San's image and branding by utilizing proper messaging in external communication pieces such as OC San's website, presentations, digital media, advertising, which includes maintaining a positive experience for OC San visitors.

Objective (measure): Continue with OC San's branding campaign including updating collateral material, signage, and promotional material as appropriate and as it is used. Maintain the lobby(s) current and informative with relevant information, i.e., displays, awards case, etc.

Strategy (why): A cohesive voice, message, look, and feel are critical to the public perception that an organization holds with its community. A positive and pleasant in-person experience reinforces OC San's culture and core values as well as showcasing OC San as industry leaders, and a well-run organization, leaving behind the stigma of typical government agencies.

Tactics (how):

- Develop new website to better meet the information needs of our visitors while meeting accessibility standards.
- Maintain website accuracy, relevancy and timeliness with new stories posted weekly.
- Provide presentations, consultation, and advice on the branding and image of OC San.
- Develop new collateral materials around the key messages.
- Explore advertising options to inform the public of agency efforts and role in enhancing the local economy.
- Fulfill all requests for graphics, photos, and logos.
- Continue with online community newsletter. Increase reach and distribution list.
- Develop a branding plan for the new Headquarters Building.
- Develop an educational display in the headquarters building to illustrate OC San's reuse and recycling efforts in support of the environment and public health. Display to be revealed when new building is unveiled.
- Maintain the lobby wall in the administration building at Plant No. 1 and the Operations Center at Plant No. 2 with OC San's current branding and messaging.

- Rotate flags on light poles at Plant No. 1 and at Plant No. 2 on a biennial basis.
- Keep the award display cabinet up to date by rotating awards.
- Keep the retiree display in the Administration Building hallway up to date. On an annual basis collect the names of the retirees and update the display board.
- Maintain and coordinate the installation of Honor Walk bricks on a biennial basis.
- Display collateral material in a neatly and organized manner displayed with current and relevant information.
- Develop a video library of OC San programs to utilize as educational and promotional tools.
- Promote the development and implementation of OC San's permittee awards program that recognizes industries for improving their adherence to excellent standards.
- Support and promote the development of an awards program for biosolids truck drivers.
- Develop a campaign to showcase OC San's diversity to be launched internally and externally.

5. Category: Educational Outreach

Program Manager: Rebecca Long

Program Coordinators/Support: Kelly Newell, Belen Carrillo, Gregg Deterding, and Cheryl Scott

Goal (what): Identify and implement avenues for education and outreach within OC San's service area to promote OC San's mission and vision.

Objective (measurement): Create and identify new educational opportunities including virtual events and webinars to promote and educate the community on OC San's work and the essential service provided. Incorporate the GWRS messaging to increase awareness of the benefits to our service area.

Strategies (why): To further promote OC San as a resource recovery agency, promote OC San's mission and promote career opportunities within the wastewater industry.

Tactics (how):

- Execute the Inside the Outdoors contract for Fiscal Year 2022-2023 to continue the educational partnership that includes the Sewer Science program to 500 students within Orange County and introduce them to OC San's virtual tour program.
- Reinstate physical plant tours and continue offering the virtual tour to increase the reach of OC San's tour program.
- Identify 10-12 community event opportunities for OC San to participate in to inform and educate the community on the important role OC San plays in public health and the environment.
- Continue to encourage and promote the Volunteer Incentive Program to have a pool of staff that volunteer for events and speaking engagements that OC San participates in.
- Expand OC San's speaker's bureau to provide a wider set of speakers available.
- Public Service Announcement (PSA) Contest – work with high schools in our service area to create a promotional PSA for OC San on a biennial basis. Obtain a minimum of 20 individual and/or group entries.
- Continue hosting Wastewater 101 Citizen Academy for our ratepayers, and influential public to showcase OC San operations and initiatives. Host a minimum of four (4) series per year.
- Support the Heritage Museum of Orange County's educational efforts by supplying material to be used for virtual and in-person teaching of OC San's key messages.

6. Category: Capital and Maintenance Outreach

Program Managers: Daisy Covarrubias and Tanya Chong from Engineering,

Program Coordinators/Support: Belen Carrillo, Kelly Newell, Gregg Deterding, Cheryl Scott, and Jennifer Wein from Engineering

Goal (what): Develop and implement outreach programs that will engage the communities affected by OC San construction and maintenance activities.

Objective (measurement): Develop, implement, and provide outreach support for over 15 capital projects scheduled to break ground in fiscal years 2022/2023 and 2023/2024 in more than 10 cities.

Strategy (why): Form a positive presence in the community prior to the start of construction projects or maintenance activities that is personal and proactive. Provide impacted community with information ahead of construction activities. Inform them of the benefits and need for the project to gain support and understanding of the necessary construction.

Tactics (how):

- Proactively offer briefings and community meetings to impacted neighborhoods, civic groups, businesses, schools, churches, and other institutions within the project area on an as needed basis.
- Explore the option of placing advertising pieces in communities/areas impacted by construction.
- Respond to inquiries within a 24-hour period.
- Provide project description and notifications to impacted residents at least two weeks before construction begins.
- Update collateral materials, fact sheets and website with current construction information on an as needed basis.
- Maintain ongoing communications with city staff and Board Members on current and upcoming construction outreach projects in affected cities.
- Maintain ongoing communications with impacted residents within the project area through collateral material (e.g., flyers, door hangers, emails, text alerts, social media posts, etc.).
- Measure customer satisfaction through a construction outreach survey to be distributed at the close of construction programs.
- Support the Vendor Outreach Program to promote OC San business opportunities with local businesses.

7. Category: Legislative Affairs

Program Manager: Rebecca Long

Program Coordinator/Support: Kelly Newell, Gregg Deterding, and Cheryl Scott

Goal (what): Proactive engagement in legislative advocacy efforts that could impact OC San and the wastewater industry.

Objective (measure): Continue positive relationships with local, state, and federal officials through facility tours, meetings, and bill tracking as stated in the Legislative Plan.

Strategy (why): Legislative advocacy is an important aspect of our business. Having relationships and being actively involved, providing input and OC San's perspective on potential legislature can and does directly affect OC San and our business.

The PAO is responsible for executing the Board approved Legislative Plan, which is updated on an annual basis. In addition, staff is responsible for tracking state and federal legislation, managing OC San's legislative advocates, and seeking appropriations and grants.

Tactics (how):

- Develop and implement Annual Legislative Plan in the second quarter of each fiscal year.
- Track bills and maintain a priority list of key legislation.
- Provide regular updates to the Legislative and Public Affairs Committee on state and federal matters.
- Host legislative tours.
- Engage in Advocacy Days in Sacramento and Washington DC once a year.
- Take positions on bills that could affect OC San or the industry.
- Work with industry organizations on state and federal issues to ensure OC San's positions are communicated.
- Partner with industry organizations to co-host virtual events and activities.
- Manage the legislative advocates' contracts and facilitate regular communication between lobbyists, staff, and the Board of Directors.

8. Category: Grants Coordination

Program Manager: Rebecca Long

Program Coordinator/Support: Kelly Newell, Gregg Deterding, and Cheryl Scott

Goal (what): Monitor, track, and apply for grants available to OC San.

Objective (measure): Apply and obtain grants for qualified OC San projects and programs.

Strategy (why): Outside funding is important in moving OC San projects and programs forward. With ongoing attention to government spending, it is vital for OC San to apply for and secure grants to offset costs when available.

Tactics (how):

- Apply for two grants a year based on availability.
- Ensure Grant Policy is updated and current.
- Research grant opportunities and report out to the Legislative and Public Affairs Committee.
- Seek out available grant funding opportunities for OC San and its various divisions.
- Secure letters of support.
- Publicize grant awards received.
- Create and measure outcomes.

9. Category: Local Government Affairs

Program Manager: Daisy Covarrubias

Program Coordinators/Support: All PAO staff

Goal (what): Ensure that local elected officials, member agencies, stakeholders, and OC San Board Members are actively engaged in the work of OC San.

Objective (measure): Provide at least two communication tools per month

Strategy (why): Keeping OC San's influential public engaged in OC San's projects and accomplishments are critical to the support and success of our agency.

Tactics (how):

- Provide Board of Directors with speaking points following every OC San board meeting that can be used when reporting back to their respective councils and community groups.
- Support an orientation (as needed) for new Board members.
- Develop and keep a current list of monthly informational presentations.
- Maintain an informational presentation video library for the Board of Directors on key agency topics.
- Provide regular reports to the Legislative and Public Affairs Committee.
- Develop OC San's Annual Report.
- Publish a Five Minutes Per Month, each month.
- Participate in government affairs committees.
- Invite new council and board members within OC San's service area to take a tour of OC San and offer presentations to their respective agencies on OC San programs and efforts.
- Create and distribute quarterly outreach tool kits for member agency PIOs to help them easily share and disseminate information about OC San.
- Host a "State of the District" event for influential leaders throughout the infrastructure and water/wastewater industry, including virtual option.
- Develop an outreach program for member agencies regarding inflow and infiltration issues within their sewer systems. The program will aim to educate, inform, and reduce inflow and infiltration affecting the local and regional sewer system.

10. Category: Crisis Management

Program Manager: Rebecca Long

Program Coordinators/Support: All PAO Staff

Goal (what): Ensure the PAO serves as the primary spokesperson for OC San during normal business and crisis scenarios and facilitates the dissemination of information.

Objective (measure): Ensure that the PIOs in the PAO can respond in a crisis. Provide the necessary tools and material to follow established protocols and support the situation as needed.

Strategy (why): It is imperative during a crisis that OC San be proactive and provide clear and effective messaging to employees, public, and the media.

Tactics (how):

- Maintain an updated crisis communication plan including regular briefings with staff to identify possible issues and responses.
- Maintain and update PAO's Continuity of Operations Plan (COOP).
- Work with Risk and Safety Management on Public Affairs' role in an emergency, including our role via the Integrated Emergency Response Plan.
- Ensure proper procedures are in place for Board, employees, and public notification.
- Maintain updated contact lists for resource, member, and partnering agencies to coordinate and assist during crisis.
- Develop protocols on everyday PAO tasks to facilitate the operations of the group in a time of crisis.

11. Category: General Manager Support

Program Manager: Daisy Covarrubias

Program Coordinators/Support: All PAO Staff

Goal (what): Ensure the General Manager and Assistant General Managers are supported with information necessary to communicate to the varied OC San audiences.

Objective (measure): Develop monthly communication pieces on behalf of the General Manager. Ensure General Manager (or designee) is participating and involved in promoting OC San's initiatives.

Strategy (why): Collaborate with the General Manager to prepare communication and messaging that reflects the mission and vision of OC San.

Tactics (how):

- Assist the General Manager and the Assistant General Managers with keeping the Board Members informed and up to date with OC San activities.
- Assist in the development of the General Manager's Monthly Report.
- Develop talking points for Board and Committee meetings.
- Develop material and speaking points for presentations and speaking engagements.
- Support the development of the OC San Strategic Plan.
- Assist in the development of the General Managers Annual Work Plan, including mid-year and end of year reports.
- Manage Ask the GM questions submitted.
- Coordinate and support VIP tours guided by General Manager and Assistant General Managers.
- Coordinate and produce two Town Hall meetings (live and/or pre-recorded) to keep employees informed and engaged.

Closing Comments

This plan is a broad outline of the Public Affairs Office program. As new issues arise, new functions and duties will evolve as well. The role of the Public Affairs Office is to stay ahead of issues, be responsive and flexible to meet the needs of the agency. We will adjust our program accordingly.

New Tactics Introduced

- Vendor Outreach Program
- Inflow/Infiltration Member Outreach Campaign
- OC San New Website
- Biosolids Driver Rewards Program
- Permittee Awards
- Diversity Campaign
- Heritage Museum Educational Program
- Video Library



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