

## **Public Affairs Strategic Plan FY 2024-2026**

### **Introduction**

The Orange County Sanitation District's (OC San) Public Affairs Office (PAO) is responsible for managing all internal and external communications. The PAO's main goal is to ensure messages are accurate, transparent, and build public trust and confidence. An integrated Public Affairs Strategic Plan is essential for effectively addressing the diverse audiences we serve.

The PAO offers services, tools, and programs to meet OC San's communication needs. This includes media relations, website and intranet site content, construction outreach, elected officials and government relations, internal communications, education, outreach, and graphic development.

The PAO has developed a Strategic Plan (Plan) for Fiscal Years 2024 - 2026. 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.

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, OC San's 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 more than 650 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.

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

### **Public Affairs Team**

The division is staffed with seven full-time employees and overseen by a supervisor and a department head.

Jennifer Cabral, Director of Communications

Daisy Covarrubias, Public Affairs Supervisor

Rebecca Long, Senior Public Affairs Specialist

Belen Carrillo, Senior Public Affairs Specialist

Kelly Newell, Public Affairs Specialist

Public Affairs Specialist – Vacant

Gregg Deterding, Graphics Designer

Isai Carrillo, 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**

- OC San approved a five-year rate program in 2023. Public communication must account for the financial impact on OC San ratepayers as decisions and proposed fees for the next five years are developed and communicated.
- OC San must continue to attract talented and qualified personnel to fill vacancies. Effectively communicating OC San's culture and emphasizing the importance of professional relationships is essential to the effectiveness and functionality of the agency.
- OC San will have new Board leadership and is anticipating a high turnover post the November 2024 election. Continuous engagement with the Board of Directors will be 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, improving and maintaining the regional sewer system throughout the service area. In the next two fiscal years, OC San plans to award 38 construction contracts worth a total of \$340 million.
- OC San administrative staff have moved into a new Headquarters across the street from Plant No. 1, in Fountain Valley. The new building houses over 300 staff members that were previously spread across 10 buildings. Internal communications and engagement will need to become a greater focal point to ensure OC San's culture remains positive between staff located at the Plants, and staff at Headquarters.

## **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, elected officials, 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
  - Contractors and Consultants
- Influential Public
  - Local, State, and Federal Elected Officials
  - Environmental Groups
  - Local Media

### **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.
- OC San is dedicated to exceeding wastewater quality standards used for resource recovery.
- OC San is committed to proper planning to ensure that public funds are 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.
- OC San provides an essential service to 2.6 million people at one of the lowest rates in the state.
- Providing reliable, responsive, and affordable services in line with our customer needs and expectations is a top priority for OC San.
- OC San is committed to creating the best possible workforce, prioritizing safety, productivity, customer service, and training.

- OC San has diligently developed an integrated planning environment that starts with the Board of Directors' expectations and extends to each employee's work product. We strive to ensure our staff members communicate effectively and provide transparent services to support 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's organizational structure includes informal relationships between employees that facilitate collaboration toward common goals.

### **Public Affairs' Goals for Fiscal Year 2024/25 and 2025/26**

1. Optimize communication with our internal audience.
2. Continue to build OC San's reputation as 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, presentations, 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, our mission, and career opportunities within the wastewater industry.
6. Educate and inform the public on the various OC San initiatives aimed to protect the environment such as What 2 Flush; Fats, Oil, and Grease; and any other necessary message.
7. Develop and implement outreach programs that will engage the communities affected by OC San's construction projects.
8. Ensure proactive engagement in legislative advocacy efforts that could impact OC San and the wastewater industry.
9. Monitor, track, and apply for grants available and that make business sense to OC San.
10. Ensure that elected officials, member agencies, stakeholders, and OC San Board Members are actively engaged in the work of OC San.
11. 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, PAO outlines the following strategies and tactics, along with the primary staff assigned to each area. Although individual staff members are the key contacts for each of the goals, the team works collectively and collaboratively, reflecting our core values. Our staff acknowledges the key role we play at OC San, not only communicating information, but also educating, consulting, and serving as a resource to our Board of Directors, employees, the wastewater industry, our member agencies, and our community. Flexibility is implemented into this plan to deal with unexpected situations and circumstances.

## **Public Affairs Strategies and Tactics**

### **1. Category: Employee Engagement**

Program Lead: Rebecca Long

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

Goal (what): Optimize communication and engagement with our internal audience to include both field staff and administrative staff.

Objective (measure): Establish a base line of current engagement by tracking access and participation from the identified tactics.

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 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.
- Incentivize employees to educate and inform the public of OC San's essential service through the Volunteer Incentive Program (VIP) by issuing points for all volunteer hours.
- Create employee recognition and celebratory events throughout the year, 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.
- 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 2025.

June 2024

- Write and coordinate the 3 Things to Know email blast to be distributed to all staff each Monday.
- Support and promote OC San “U”, OC San’s training program.
- Create “New Employee Welcome Kit” to be distributed on employees first day of work to introduce employees to the OC San culture, include electronic communication with key messages and link to important information.
- Create and implement an employee engagement audit to assess the value of the information shared, the method used, and feedback on OC San’s culture.
  - Conduct periodic surveys following employee events to allow for improvements and/or modifications.
- Implement an employee art contest using OC San’s infrastructure.

## **2. Category: Industry Experts**

Program Lead: Kelly Newell

Program Coordinator/Support: Public Affairs Specialist, Gregg Deterding, Isai Carrillo, 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 Lead: 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.

June 2024

Objective (measurement): Track and 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.
- Maintain a digital press kit.
- Build a calendar of news release topics of interest to the public and stakeholders.
- Invite media for a facility tour, including traditional and non-traditional media.
- Develop media strategies for important events, decisions, or actions.  
e.g. CIP Campaign (see details in Category 6: Capital and Maintenance Outreach)
- 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 #OCSanCareers, #What2Flush, and those currently supporting ongoing efforts.

#### **4. Category: Agency Branding and Messaging**

Program Lead: Belen Carrillo

Program Coordinators/Support: Gregg Deterding, Isai Carrillo, Kelly Newell, Public Affair Specialist, 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.

June 2024

- 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.
- Update and maintain signage across OC San facilities.
- Develop a Board approved design for the hands-on educational display for the outdoor patio.
- Maintain the lobby wall in the Operations Center at Plant No. 2 with OC San's current branding and messaging and implement lobby display at the Headquarters.
- Rotate flags on light poles at Plant No. 1 and at Plant No. 2 on a biennial basis.
- Keep the award display up to date by rotating awards.
- Install a retiree display in the Headquarters and keep it up to date.
- 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.
- Update a video library of OC San programs to utilize as educational and promotional tools.
- Promote implementation of OC San's permittee awards program that recognizes industries for improving their adherence to excellent standards and expand to recognize multi-year awardees. Identify methods to include waste haulers in recognition system.

## **5. Category: Educational Outreach**

Program Lead: Belen Carrillo

Program Coordinators/Support: Kelly Newell, Public Information Specialist, Gregg Deterding, Isai Carrillo, 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.

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 2025-2026 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.
- Revise plant tours to incorporate Headquarters.
- Identify 8-10 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.
- Expand OC San's speaker's bureau to provide a wider set of speakers available.
- Continue hosting Wastewater 101 Citizen Academy for our ratepayers, and influential public to showcase OC San operations and initiatives. Host one session with four classes 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.
- Connect with OC San service area libraries to identify possible OC San program collaboration and implementation opportunities that would aim to highlight selected OC San messaging points such as What 2 Flush, the wastewater treatment process, and career opportunities.

## **6. Category: Capital and Maintenance Outreach**

Program Leads: Belen Carrillo and Tanya Chong from Engineering,

Program Coordinators/Support: Kelly Newell, Public Affairs Specialist, Rebecca Long, Gregg Deterding, Isai Carrillo, Cheryl Scott,

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 10 capital projects scheduled to break ground in fiscal years 2024/2025 and 2025/2026 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.
- Provide outreach program training for the engineering team to help them understand the outreach program, the role of the community liaison and benefits to project.
- Implement a multipronged outreach strategy that will include industry and media coverage for the Supercritical Water Oxidation project.

## **7. Category: Legislative Affairs**

Program Lead: Rebecca Long

Program Coordinator/Support: Kelly Newell, Public Affairs Specialist, 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.

June 2024

- 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 as needed.
- 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 Lead: Rebecca Long

Program Coordinator/Support: Kelly Newell, Public Affairs Specialist, 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 Lead: Rebecca Long and Belen Carrillo

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 Steering 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 OC San" event for influential leaders throughout the infrastructure and water/wastewater industry, including virtual option.

## **10. Category: Crisis Management**

Program Lead: Rebecca Long

Program Coordinators/Support: All PAO Staff

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

Objective: 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: 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 Lead: Daisy Covarrubias / Rebecca Long

Program Coordinators/Support: All PAO Staff

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

Objective: 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: 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 Manager's 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 Manager.
- Coordinate and produce annual All Hands 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**

- OC San new website – In progress
- Library Educational Program
- Headquarters Educational Display – Phase 2
- Library Educational Program
- Video Library Update
- Employee Engagement Audit
- New Employee Welcome Kit
- Employee Art Contest