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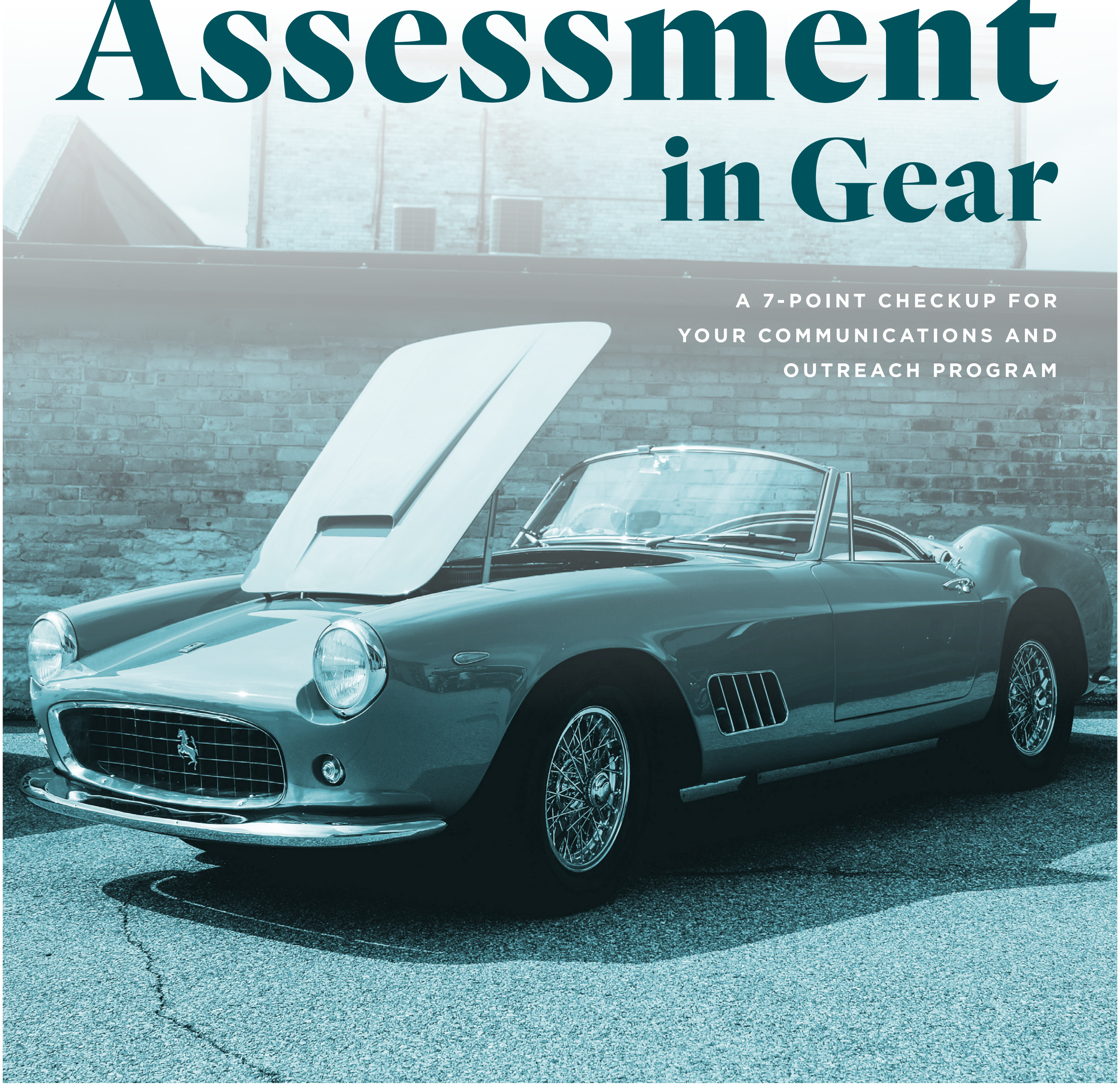
Get Your Assessment in Gear

A 7-POINT CHECKUP FOR YOUR COMMUNICATIONS AND OUTREACH PROGRAM



Have you ever tried to travel somewhere you have never been before—a specific place—without a map or Siri to guide you? It often takes longer or, worse, where you end up is not where you wanted to be. While getting in the car and just going somewhere without a specified destination can be an exhilarating adventure, it's not how you effectively implement a successful communications or outreach program.

When it comes to effective communications and outreach, most water utilities have the implementation part down to a science. In fact, we sometimes get so excited to execute, we forget the most important, first step: Assessment. Just as you wouldn't build a new intake without first studying the daily and seasonal water demand, streamflow, and surrounding land use, you shouldn't jump to communications and outreach implementation without a careful examination of your current situation, program, assets, and results.

Assessing your program requires analysis of it from 3 distinct perspectives:

1. What's happening right now that has influence over your success?
2. Is the effort you are putting forth following best practices and appropriate for your environment?
3. What sort of results are you seeing?

This assessment rubric helps you deeply evaluate your approach to communications and outreach to assure you are spending customer money wisely and effectively. So just as you would take a moment to inspect your vehicle before heading out on an exciting trip, think of this as your "under-the-hood" 7-Point Checkup of your program before you hit the road at full speed ahead.

Step one examines the environment that surrounds you. Steps two through six examine your internal efforts —the "outputs" of your work. Lastly, step seven examines the external results or "outcomes" of the efforts you make. Together, all seven steps yield a complete picture of the efficacy of the outreach program, providing a comprehensive and specific idea of what's working and what could be improved.

STEP 1
Scan the Environment

STEP 2
Examine the Plan

STEP 3
Critique Your Messaging

STEP 4
Question the Components

STEP 5
Monitor the Media

STEP 6
Evaluate Operations

STEP 7
Review Your Results

STEP 1

Scan the Environment

Begin your assessment with an in-depth examination of the environment you're working in. Scan it to understand the landscape from all angles, the politics of the area, economic and environmental issues, and impacted stakeholder audiences.

Some of the questions you want to ask yourself in this step include:

> Who are the people you are trying to reach? Demographics?

> What are their beliefs, values, and motivators?

> Who is influential in your community and what do they think?

> Who is in charge in your community and how does the vision of the community leadership affect your organization's success?

> Are there any pending regulations or local policies that will have bearing on your success?

> How is the local economy and how does that affect your work?

> Is this an election year? Will new leadership mean new challenges, what kind?

> How does weather, climate, and the current natural environment factor into your work?

> How do people see your organization? What is its reputation and why?

STEP 2

Examine the Plan

Are you following a communications and outreach plan? Not a list of things to do, but an actual plan that identifies a problem or opportunity, then goals and objectives to reach it; strategies and tactics for meeting goals and objectives; and measurement?

If not, this is an important first step to take. Having a strategic communication plan provides a common understanding and roadmap for staff to ensure resources are used in the most effective and efficient way possible, ensures that messages and strategies are targeted to audience segments, and that measurable objectives are being followed so that success can be evaluated. It's how you reach your destination efficiently.

If you **DO** have a plan, these are some questions for your evaluation:

- Is it based on research? What kind?
- Does it identify a problem or opportunity? What?
- Does it measure the things you need to change?
- Does it provide enough insight into your audiences so you know how to reach them effectively?
- Knowing you can't reach everyone, have you prioritized audiences?
- Do the goals and objectives you select solve the problem?
- Are those goals aligned with organizational goals?
- Are strategies and tactics customized to reach each audience segment where they are? How do you know?
- Have you included measurement and evaluation methods and does your evaluation track back to your initial research?

Taking the time to ensure your plan is effective in this way will not only save you time and money, it will ensure you and your team are doing the right things at the right time for maximum efficiency and results.

STEP 3

Critique Your Messaging

Hopefully, you have created a Message Platform, which is a document that lays out all the key messages your audience segments need to hear. If you don't have one, this exercise is vital as it assures consistency across all channels of communication and helps provide focus to the work.

Take the time to create or review your platform to answer these questions. Make sure you have thought of all the possible questions your customers may ask you about your organization or program, and make sure you (and customer service staff) have good quality answers for them, written from the customer's perspective. Here are some of the key questions to evaluate it:

> Are your messages written clearly, without industry terminology or jargon?

> Is the language free of bias?

> Are the messages compelling and persuasive?

> Are the messages appropriately contextual and relevant to your audiences?

> How could you fine-tune your messages to make them even more persuasive?

Do the Grandma Test:

Have your (or a friend's) grandmother review the messages and ask them what they learned and think as a result. Is it what you intended?

STEP 4

Question the Components

The components of your program are like the engine of the vehicle you're driving on this journey. They are the tactics you use to reach your audiences. They may include brochures and fliers, website and social media posts, advertising, event materials, PowerPoint slides, articles, and more. In this step, you are examining and evaluating the means by which you are conveying your messages.

Gather together a copy of every brochure, flier, postcard, bill stuffer, web page, news release, article, case study, and anything else you've created to communicate to customers. Look at them as a group and also individually and ask yourself:

- Are these tactics right for your goals and audiences and, if yes, how do you know?
- Do the materials have a consistent brand (look and feel)? Can the reader tell at quick glance that they are yours?
- Are they designed for maximum clarity? Can the reader quickly see what the message is?
- Can they compete with other materials your audience is exposed to?
- Do they clearly convey a consistent message or call to action? Are your website, hotline, and address easy to find?
- Are there other tools that could help you achieve your goals?
- How might the materials be improved to better align with your goals and objectives and appeal to your audiences?
- If you have key messages—key words and phrases you want to get across—are you doing so on each piece? Consistently?

STEP 5

Monitor the Media

Traditional and social media outlets provide a critical value to you in that they offer credibility through outside validation and can be incredibly insightful in terms of understanding how your messages are being interpreted by a lay audience. Whether from word-of-mouth or a news source, this third-party conversation also helps you reach a larger swath of the community than you might otherwise be able to.

Gather all of your media clips together or plan to fire up "the Google" to collect them. Ask yourself:

- What kind of media coverage are you receiving? Is it a positive, negative, or neutral tone?
- Who is covering you? Who isn't? Do you know why?
- What topics have and haven't received coverage from news outlets? Do you know why?
- Are you on the right social platforms? How do you know?
- How is your engagement and content? What are people saying?
- What type of content brings you more comments and shares versus less?
- Who is following you? Your customers? Influencers?

A strong media approach—using both earned media (traditional news media) and shared (social platforms)—can help build greater awareness and support for programs, help you more deeply understand issues and levels of awareness, and ascertain whether and to what extent any misinformation about the program exists and persists.

STEP 6

Evaluate Operations

In step six, you are examining how you do the work. This requires knowledge of the team involved, their level of effort, budget, and other resources allocated to communications and outreach. It may require some checking in with other teams as well as with your finance department.

Here are some questions to guide your evaluation:

- What's the level of effort? How many people are working how many hours?
- What's the budget? Is it meeting your needs? How has your budget changed over the past five years and how is it likely to change in the future?
- From a resource and budget standpoint, is the effort adequate to deliver results? How do you know?
- Are the capabilities of staff involved right for the need? How do you know?
- Are you spending time and money in the right places? How do you know?
- What keeps you from being successful? Is this something that can be addressed with a different allocation of resources or training?
- How about other staff in your organization, do they know the plan and the talking points?
- Is everyone aligned?

Your staff, organization wide, also plays a key role in your success, so look internally—and include contractors on the project—to ensure everyone is on the same page with respect to messages. Many times, organizations focus all of their energy on the execution of the work and forget to look at how they're doing it. This step ensures your team and approach is adequately trained and resourced for success.

STEP 7

Review Your Results

In steps two through six, where you examine your effort, the outputs of your program, you really see only half the picture of the assessment. The critical second half—step seven—examines whether your audience received your messages, understood them, and then acted on them in the way you had hoped.

Examining website views, social media engagement, and blog comments are a start, but they only scratch the surface. The only true way to know for sure what your audience knows and thinks is to ask them. There are a few ways to accomplish this:

1. **An online, fully anonymous survey** can tease out the key data points in a quantitative way. Ask direct questions to assess degrees of agreement and knowledge, and ask multiple choice for exact knowledge or preferences. Some sample questions might include:

    - How often do you drink water from the tap versus store-bought bottled water?
    - Do you water your lawn?
    - To what degree do you agree or disagree with the following statement: *Activities I engage in on my property, such as fertilizing my lawn, impact my drinking water quality.*

    A good, quality survey will require some time to determine what it is you want to know and then to develop the survey itself. Then you need a plan for how to get your customers to take it. Will you use the media? Your website and social media? Do you have partners in the community who can share the link? Plan to keep the survey live for two to three weeks or until you have at least 400 completed surveys, whichever comes first.

If budget permits, consider using a professional market research firm for your survey work, as it can be time-consuming, and having their specialized expertise for question design and statistical analysis is well worth it.

2. **A series of focus groups** following the survey can help you probe deeper into the why behind the data, and it can give you an opportunity to test new messaging or outreach ideas. An example of a focus group question based on the survey might be something like:

    - Thirty-five percent of the customers we surveyed are not drinking tap water. Does anyone here not drink tap water? If so, why not?

Focus groups can take up to a few months to plan for logistics, such as securing a location and catering; recruitment, including gathering 10 to 12 representatives of your service area in the room; and developing the actual guide to moderate the conversation. Consider using a professional focus group recruiter and expect to spend about $100 per person plus a flat fee for the recruitment screener to help them select the right representation of people. You will also need to pay attendees at least $125 to attend a two-hour session, more in metropolitan areas or for daytime sessions with business community members. If budget is an issue, you can also do these less formally by recruiting a citizen advisory group—a great strategy to consider—for on-going two-way communication with a representative group of your customers.

3 **Intercept surveys** are another tool that can be used to take a quick pulse of a community. Usually shorter in length than digital surveys, intercept surveys are done in a high foot traffic area such as at a mall or outdoor park. The questions in this survey should be of the same style as the digital survey.

Intercept interviews only require the time it takes to develop the survey and then to physically be out in the field collecting responses. Depending on how many people you have available to conduct them and how busy the area is, you may be able to get 100 surveys completed in one day.

Alternatively, a mini intercept survey can be offered on your social media channel or website to take a quick pulse of the community on a particular issue.

4 **In-depth Interviews (IDIs)** are another way to get insights from your audience. An IDI is great for understanding what the most influential members of your audience are thinking. A sample question might be something like:

> In terms of the water resources in your community, what keeps you up at night? Why?

IDIs will be dependent on how quickly you can schedule 30-minute phone calls with your influencers. Figure about a two-week period to conduct them and 30 to 45 minutes for each interview. Conducting 10 to 12 interviews should be sufficient.

It’s best to incentivize participation in surveys and focus groups by offering a drawing for survey participants and a stipend and food for focus group attendees. For IDIs, it’s important to interview true influencers and not just people who happen to be available to talk. You need the input from the folks who are aware of high-level community issues and strategy and who are driving conversations.

Putting it All Together

Completing these steps will require an investment of time. Step one could be completed in a few hours with participation from a variety of staff representing different aspects of your business. Steps two through six are doable over a two-week period, giving yourself a few hours over two days for each step. Step seven will take the most time, likely three to four months from planning to completion, but it can be done in tandem with the other steps.

Once you have gathered the results from all seven steps, you will likely see some patterns emerge. You can expect to find some opportunities for improvement in messaging and your strategies for reaching audiences. You may learn some audiences have missed your messages altogether, or even where you think people understood something, they actually didn't.

Capture all of your results and observations on paper in a Findings Report, then using what you learned in steps one and seven, create a plan for addressing the shortcomings. Be sure to clearly identify where the gaps are and how you'll address them. Most important, be certain to gain a crystal picture of what your audience is doing, not doing, knows, and doesn't know so that you can design your communications and outreach program specifically to improve in those areas.

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