

San Geronio Pass Water Agency

DATE: January 22, 2024
TO: Board of Directors
FROM: Lance Eckhart, General Manager
BY: Lance Eckhart, General Manager
SUBJECT: ENTER INTO A CONTRACT WITH CV STRATEGIES FOR PUBLIC INFORMATION SUPPORT SERVICES

RECOMMENDATION

Authorize the General Manager to enter into a contract with CV Strategies to provide various public information support services.

PREVIOUS CONSIDERATION follow this format:

- Board of Directors – August 23, 2023: The Board formed the Public Information & Outreach Ad-Hoc Committee to develop a plan to increase Agency public information and miscellaneous support services.
- Public Information & Outreach Ad-Hoc – October 13, 2023: The Committee discussed current efforts and develop options to bolster Agency presence and various and support services to support the Board and Staff.
- Public Information & Outreach Ad-Hoc - December 16, 2023: The Committee reviewed a suite of options available for public information and training using our current public information consultant.
- Public Information & Outreach Ad-Hoc – January 9, 2024: The Committee reviewed met with the current public information consultant and reviewed a “trimmed down” proposal through FY 2024-25. The committee recommended moving a sole source contract associated with the “trimmed down” proposal to the Board for consideration.

BACKGROUND

Strategic Goal 7: Engage and educate the public in a meaningful way that generates a greater understanding of the Agency’s role in water supply reliability and the importance of sustainability.

The Agency has been working with CV Strategies to support various public information campaigns for over a decade. Over the last two years, CV Strategies has assisted with social media, press releases, op eds, brochures/informational materials, assisted the Inland Empire Resource Conservation District with event support and the 5-Year Strategic Plan update. Work with CV Strategies has been completed on an as-needed basis and has been executed under the General Manager’s authority.

The public information efforts have been successful, and a more formal public information plan and strategy is needed. Staff believes the Board would like to meet these objectives

in an updated program: 1) use current efforts as a starting point; 2) continue efforts without interruption; 3) maintain momentum. In 2024, the Agency will be making major decisions to continue to participate in “generational projects” such as the Delta Conveyance Project and the Sites Reservoir Project, where sustained local support will be paramount. Additionally, the Agency is pursuing various local recharge projects and continuing to develop our collaborative programs with local stakeholder partners. Education and support of local programs to promote awareness of Agency activities and collaborative efforts will help support the Agency’s developing regional role.

ANALYSIS

The Committee met with Staff on three separate occasions to develop a strategy and implementable plan to address the Agency’s public information program. The main issues the Committee considered were the following: hire an in-house Public Information Officer or continue to outsource; how to accelerate the program and avoid any gap in public information; consider continuing with the Agency’s current consultant or issue a request for proposals; and develop a program to be moved to the Board for consideration.

- **In-house vs. outsource:** The Committee considered adding a single professional staff addition (e.g., Public Information Officer) to the current staff. This would result in a single experienced position that would necessitate a moderate compensation package. There would still need to be support for the new staff to execute the numerous initiatives the Committee was interested in and therefore, would be a staff addition and the need for some degree of a supporting consulting team. The Committee agreed that, although this option may be considered in the future, outsourcing to a consulting team would more align with the Agency’s near-term desires.
- **No gap in service/current support:** The Committee wanted to avoid any gap in the current service (i.e., social media, press coverage, event support, etc.) and accelerate the program. Hiring new staff or issuing a request for proposals would take a material amount of staff time and calendar time to implement. Any new support, whether new staff or a new consulting firm, would take a considerable amount of time to onboard and familiarize with the Agency, local stakeholders, and the many initiatives the Agency is engaged with related to the State Water Project. The Committee considered the above and recommended that the Agency remain with the current consultant to maintain momentum and request an expanded scope of services from CV Strategies which, if approved by the Board, would be a limited term, sole-source contract.
- **Committee recommended program:** A “full-service” proposal from CV Strategies was presented to the Committee. The Committee trimmed the proposal which resulted in desired services and future optional services. The term of the proposal was through FY 2023-24 to FY 2024-25 (18 months). This recommendation would allow the Agency to continue to maintain/accelerate the current public information program and give the Staff and the Board time to consider staff additions and/or issue a request for proposals (if desired) in FY 2025-26. The recommended program is “front-loaded” with more timely recommended actions at the beginning

of the program, many of which are one-time efforts, and transition to maintenance items in the latter part of FY 2024-25.

FISCAL IMPACT

This expense would come from the General Fund. The proposed contract totals \$196,960, spread over 18 months. The expenditure recommendations for Quarter 3 and Quarter 4 of FY 2023-24 add up to \$87,760, with the balance to be expended in FY 2024-25.

The most straight-forward approach would be to make a budget revision to increase the Public Information line item by \$90,000. Funds could come from one or more of the following line items:

- Public Information; \$20,000 is projected to be available at year-end
- Other Professional Services; \$15,000 is projected to be available at year-end
- General Engineering, CEQA, EIR, Etc.; budget \$150,000, nothing expended so far
- Reduce the net excess revenues available at year-end from \$494,000 to \$404,000

This would be a time and materials contract not to exceed \$196,960. This amount does not include “Optional” tasks or hard costs (e.g., printing, billboard rental, give aways, etc.).

ACTION

Authorize the General Manager to enter into a contract with CV Strategies to provide various public information support services.

ATTACHMENTS

CV Communications and Outreach Proposal



Communications & Outreach Proposal

January 2024

CV Strategies

- Comprehensive communications firm
- Skilled storytellers who think holistically
- Full suite of in-house creative services
- More than 100 clients across California, including water agencies

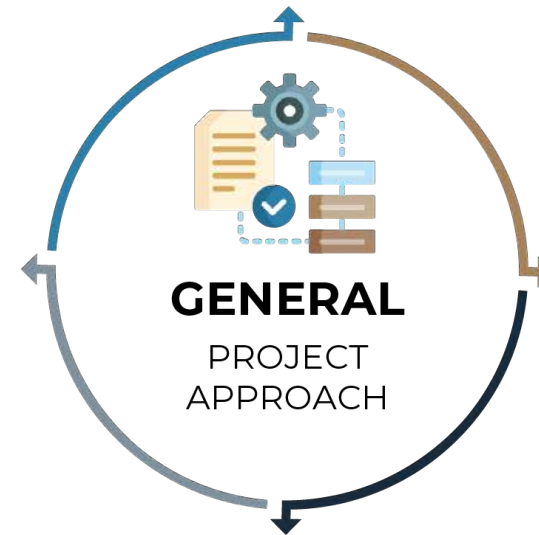
PHASE 1 RESEARCH

- » Assess current and previous efforts and lessons learned
- » Check appropriate analytics for additional insight
- » Internal and external interviews/information gathering

PHASE 4 EVALUATION

- » Check milestones against KPIs
- » Adjust course as needed

Project Approach



PHASE 2 PLANNING

- » Determine goals and key performance indicators (KPIs)
- » Establish priorities and appropriate key messages
- » Develop workplan and schedule

PHASE 3 IMPLEMENTATION

- » Craft content
- » Design graphics
- » Leverage photography
- » Create/film video assets

CV Strategies

Regional Clients



BEAUMONT-CHERRY VALLEY
RECREATION AND PARK DISTRICT
Creating Opportunities for a Healthy Community



CV Strategies

State Water Contractor Clients



CV Strategies

Relevant Project Successes



Water rights protection



Four agency merger and agency launch



CHINO BASIN

Water Conservation District

Waterwise Community Center

Secured agency independence



SANTA ANA SUCKER

Balancing habitat preservation with the needs of a growing California

Santa Ana Sucker Fish Taskforce



Rebranding and website



SANTA ANA WATERSHED PROJECT AUTHORITY

Habitat Conservation Plan Communication
Santa Ana River Conservation and Conjunctive Use Program (SARCCUP)



Conservation outreach



FERC dam relicensing

A Long History

SGPWA & CV Strategies

- **State of the Water Supply:** Led the Agency in developing and hosting “State of the Water Supply” events during drought periods in 2014 and 2016.
- **Capacity Fees (2014) to fund Sites Reservoir Project:** Advanced community understanding using clear, consistent informational messaging via methods such as a postcard, handout and lobby card.

Recent Initiatives

- Increase in visibility and awareness of SGPWA's value and role as a water leader and steward in the eyes of the community, partners and stakeholders.
 - Strategic planning
 - Positive earned media coverage – local, regional and state
 - Enhanced presence at community events
 - Collateral that cohesively carries SPGWA's brand and messaging
 - Elevated social media presence and significantly increased engagement
 - Regional messaging and partnerships, including drought

Recent Successes



Local groundwater plan to boost stores

Twenty-year sustainability plan details six projects to safeguard regional water supply.

Groundwater Sustainability Plan (GSP) for the Coachella Valley – San Gorgonio Pass Subbasin was approved by the California Department of Water Resources (DWR) this fall, a vital step toward maintaining the stability of the subbasin for the local residents who rely on it.

The subbasin encompasses about 35,965 acres and is a water source for several local communities, nearly all in disadvantaged or severely disadvantaged communities.

The GSP is designed to balance water demand with

- Municipal water conservation
- Stormwater capture
- Additional imported water spreading at Noble Creek spreading basins
- New pipeline with additional imported water spreading in the Cabazon storage unit
- New pipeline with

additional imported water spreading in the Banning storage unit

- New imported Colorado River Aqueduct water spreading in the Cabazon storage unit.

The plan was a joint effort between the San Gorgonio Pass Groundwater Sustainability Agency (GSA), Desert Water Agency (DWA) and Verbenia GSA. Member of the GSAs include San Gorgonio Pass Water Agency (SGPWA), Banning Heights Water Company,



WaterWorld

DRINKING WATER > DISTRIBUTION

San Gorgonio Pass Water Agency planning new percolation basins

The Southern California water agency is planning the Brookside West Recharge Facility to support growing demand for water storage.

WaterWorld

DRINKING WATER > DISTRIBUTION

Beaumont-Cherry Valley Water District purchasing surplus water to replenish groundwater

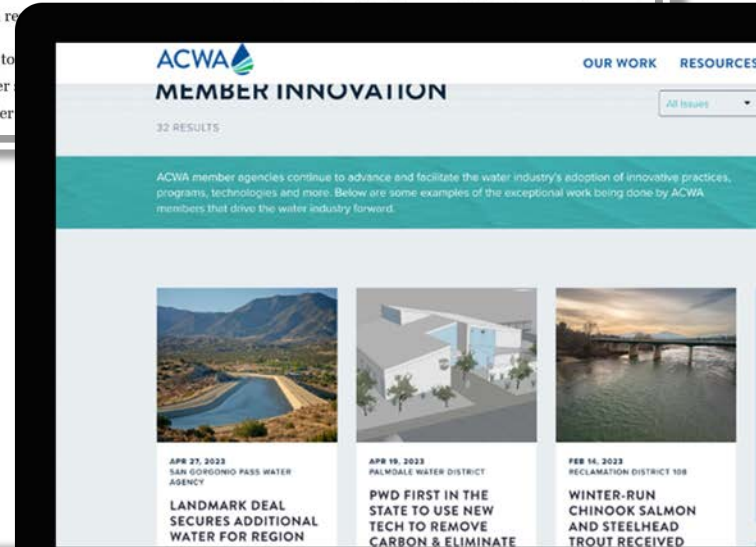
Up to 18,200 acre-feet of water ordered from the San Gorgonio Pass Water Agency will replenish local groundwater through BCVWD's Noble Creek Recharge Facility and the SGPWA Brookside Recharge Facility.

Beaumont-Cherry Valley Water District (BCVWD) announced that it is buying as much water as possible to replace local groundwater and build community reserves.

Following California's unprecedented wet weather in 2023, BCVWD requested to purchase up to 18,200 acre-feet of water from San Gorgonio Pass Water Agency (SGPWA) for 2024. The purchase follows a similar water order for up to 18,000 acre-feet in 2023.

The extra water will be stored for future use, supporting long-term supply dependability for area residents.

The to
water
Water



Recent Successes

SAN GORGONIO PASS WATER AGENCY
A Leader in Regional Sustainability



San Gorgonio Pass Water Agency understands the importance of protecting our local water resources.

Located in Beaumont, California, the Agency ensures a reliable water supply that supports the health and wellbeing of residents and the growth and prosperity of businesses in communities across the Pass Area.

CONSERVATION FOR THE NEXT GENERATION




sgpwa.com

CONSERVATION FOR THE NEXT GENERATION



SGPWA Brookside Avenue Groundwater Recharge Facility



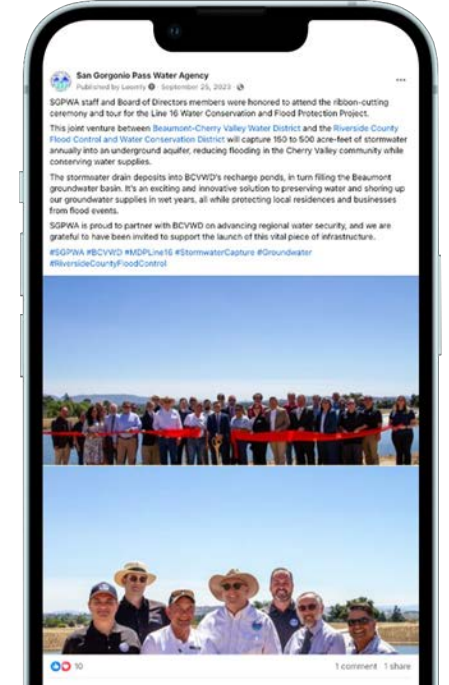

Established 1961

State Water Project
California Aqueduct - East Branch

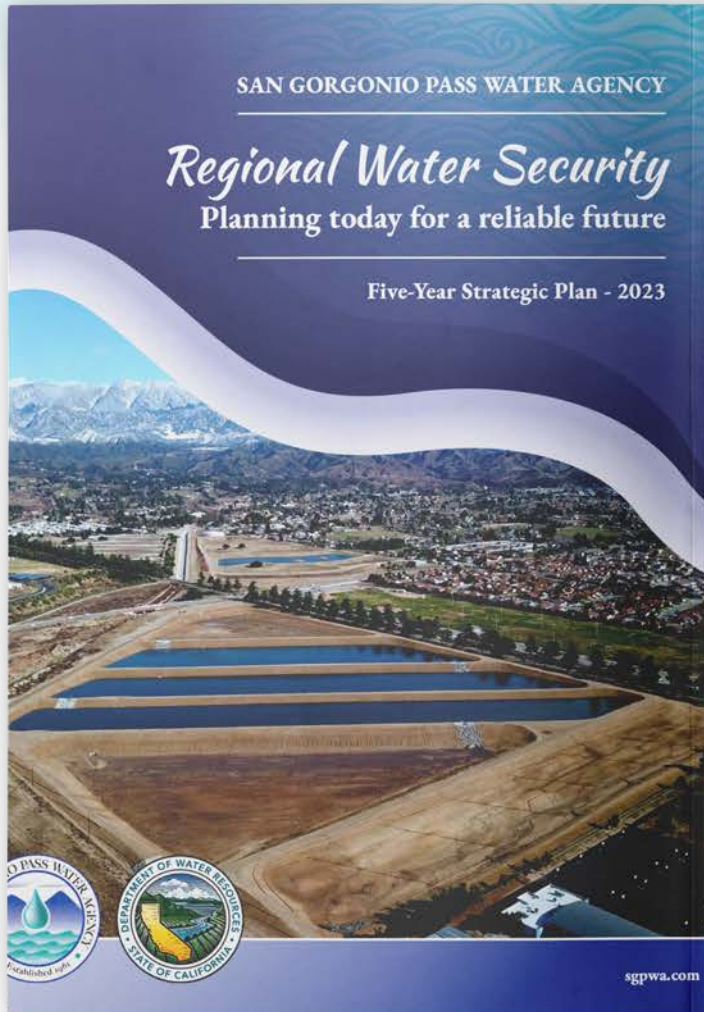
Scan for details about SGPWA
SGPWA.com

Scan for water-saving tips, family water conservation games and more
NEXTGENCONSERVATION.org

f /SGPWA



Recent Successes



Mission
 San Geronio Pass Water Agency supports the region's quality of life through sustainable water management.

Vision
 San Geronio Pass Water Agency aims to provide water security that meets the needs of the region within an evolving landscape, transcending boundaries to work toward common goals, create synergy through collaboration and ensure an adequate water supply today and in the future.

Values

Collaborative	Innovative	Sustainable
Reliable	Accountable	Forward-focused
Responsive	Trustworthy	

Water Supply & Stewardship

Align with the current and future water landscape, supporting the region's long-term water supply portfolio and advancing water sustainability.

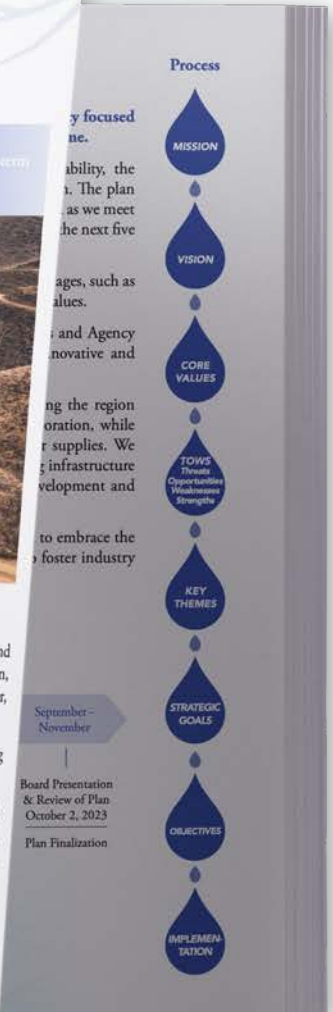
6. Explore new tactics to support future supply and mitigate regional droughts, such as desalination, stormwater capture, cloud seeding, recycled water, and other opportunities as they arise.

7. Support local small water systems in securing funding and resources.

8. Promote water conservation by partnering with regional stakeholders. (See Regional Leadership, Industry Relationships, and Collaboration, page 10, and Public Engagement, page 11.)

9. Align with and support local water and land use plans.

10. Work with the local adjudication and Groundwater Sustainability Agencies to manage the region's groundwater basins.



Proposal Breakdown



Why Now?

- Leverage significant momentum built from recent communication and outreach initiatives.
- Continue to build broader regional and statewide presence – step up from status quo.
- Integration across communication platforms, messaging and tactics. Examples:
 - Business cards that tie to website and other content (such as videos)
 - Website content that highlights partnerships, small systems support, the Sites Reservoir Project and the Delta Conveyance project



Proposal Details

- Elevates the Agency – leaders and stewards
- Focus on integration across communication methods
- Priorities identified by SGPWA leadership and PIO Ad-hoc Committee
- Front-end work feeds 18-month timeframe
 - Fiscal years 2023-2024 and 2024-2025
- Not-to-exceed contract – cost menu style



Research & Planning

- Communications analysis
- Communications Master Plan
- Implementation timeline
- Earned media strategy and annual public relations plan
- Key messages
- Master events calendar, including community events and speaker and sponsorship opportunities
- Ad-buy and calendar
- Key performance indicators

Implementation

- Strategic counsel
- Foundational elements
- Agency visibility
- Community events and public education
- Industry outreach
- Internal outreach
- Evaluation
- Optional strategies/tasks

Sample Tactics



Digital Footprint:

Website audit and update, social media strategy, digital ads



Collateral:

Handouts, brochures, and district maps



Board Support:

Update digital and print business cards, tie into relevant website content



Earned Media:

Press releases, opinion/editorial pieces, story pitching



Speaker Resources:

PowerPoint templates and “grab and go” presentation



Partnerships:

Industry outreach and partner messaging



Photo/Video Library:

Photography and drone session



Board & Staff Sessions:

Messaging and media training

Optional: Video series and State of the Water Supply event

Long-term Results

- Ongoing strategic counsel
- Metrics
 - Social media
 - Earned media
 - Ad buys
- Six-month reports to Board of Directors
- Course-correct as needed



Questions?

SAN GORGONIO PASS WATER AGENCY

Communications and Outreach Scope of Work



SUBMITTED MONDAY, OCTOBER 30, 2023, BY:

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Los Angeles • Palm Desert • Sacramento

CVSTRATEGIES.COM

Work Plan





San Geronio Pass Water Agency (SGPWA) is a regional leader in water supply management and a vital steward of the area’s water landscape. CV Strategies recognizes the Agency’s desire to increase partner, stakeholder and community awareness of the Agency and its critical role in local water supply security.

Using cohesive messaging that best tells the story and weaves together region-wide themes, we will implement a proven, four-phase process to develop and carry out an overall communications strategy and annual public relations plan.

WORK PLAN

PHASE 1 RESEARCH

CV Strategies has a history of knowledge with SGPWA, providing a strong foundation to enact comprehensive communication planning and services. Using the information our team has already gathered, we will work with staff to identify goals, priorities, a workplan and schedule.

Evaluating recent successes and identifying opportunities will be key to successful planning and implementation. CV Strategies will review existing communication and public relation efforts to highlight achievements and gaps and make strategic recommendations. We will determine current practices that are effective and define additional efforts that can elevate Agency communications.

Our team will conduct interviews with staff, leadership, Board members and key stakeholders to determine attitudes and perceptions of the Agency’s communications. Input from across the organization can also identify challenges and opportunities for growth. CV Strategies also recommends an online stakeholder survey to help flesh out further input about engagement and effective messaging.

Thoughtful analysis of messages and delivery methods will lay the foundation for the remaining tasks outlined in this project proposal, guiding development of a comprehensive Communications Master Plan and tactical implementation.



WORK PLAN

PHASE 2 PLANNING

Using the information gathered in Phase 1, CV Strategies' specialists will collaborate with staff to identify communication goals and objectives. We will create a plan with strategies and tactics for elevating communications that include appropriate messaging vehicles for various audiences.

CV Strategies will craft key messaging themes that will serve as the foundation for all outreach and create a messaging framework. The key messages will form the core of a high-level Communications Master Plan.

The plan will detail optimal communications practices for target audiences and employ known best practices for effective public agency outreach. This will ensure that the organization's brand of excellence is consistent and that all communications align with the organization's mission and vision.

The plan will detail how collateral materials should be utilized and which activities should be prioritized. In addition to print and digital channels, various communication tools such as education programs, community events, partnerships, advertising, and sponsorship opportunities will be considered and specified for best use of the organization's resources.

The plan will include earned media strategies for increasing coverage of Agency activities as well as positioning SGPWA as the go-to expert source for water-related stories by local, regional and industry media outlets. For advertising, we will utilize research, metrics and thoughtful analysis to determine ad-buy recommendations and negotiate best rates.

CV Strategies will work continuously with staff to revise and finalize the plan using virtual and in-person progress meetings, phone calls and email, as well as project management software. The final product will create organization-wide communications norms and establish guidelines, procedures and best practices for internal and external communications.

Our team will happily make presentations on our progress and final product to staff and the Board of Directors. These presentations will connect directly to the established objectives and highlight deliverable performance.



WORK PLAN

PHASE 3 IMPLEMENTATION

Leveraging work that has already been put in place, CV Strategies will collaborate with staff to deploy the tactics outlined in the Communications Master Plan.

The Communications Master Plan will include implementation strategies linked to timelines for execution to ensure we are on task and on target. In this stage, we will continue to communicate regularly and make sure tasks are done efficiently to maximize the Agency's investment.

CV Strategies will meet consistently with staff to identify story ideas related to events, initiatives and important new developments; create stimulating visuals and content; and enhance visibility through a variety of outreach methods, such as collateral, media outreach, ad buys, social media boosted posts, and community and industry engagement.

We will deliver all campaign assets in this phase, such as:

PRESS RELEASES/MEDIA RELATIONS

CV Strategies will mine for stories that are most likely to generate earned media coverage and net the best value. We will target press releases for different publications and consider all distribution channels to ensure there is a match and a connection.

PUBLIC RELATIONS

We will explore stories and create the narrative that accurately portrays the Agency and positively influences attitudes about SGPWA and its value.

PHOTOGRAPHY

Capture updated, high-quality visuals of employees, Board members, projects, services and events to elevate SGPWA's relationship with audiences and advance community and stakeholder connections.

GRAPHICS/COLLATERAL

Enhance the SGPWA brand and messaging through distinctive design of collateral and graphics, such as brochures, handouts, presentations, billboards, ads, e-blasts, business cards, logo gear and giveaways.

SOCIAL MEDIA

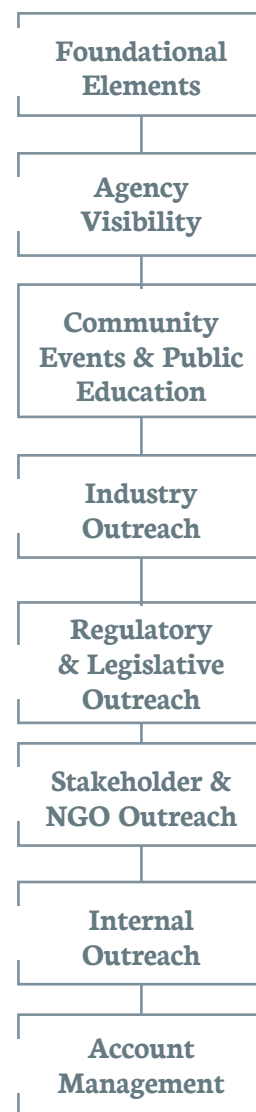
Create month-long calendars with content, short-form videos, photography and graphics that will inspire stakeholder engagement.

VIDEOS

Incorporate drone video, animation, time lapse photography, graphics, and other powerful production elements to craft engaging content that showcases SGPWA.

WEBSITE

Audit and update www.sgpwa.com and nextgenconservation.org websites to create digital spaces that are captivating, informative and easily navigable.



WORK PLAN

PHASE 3 IMPLEMENTATION (CONTINUED)

EVENTS & INDUSTRY CONNECTIONS

Promote public and stakeholder education by guiding community event attendance, evaluating educational, partnership, presentation and sponsorship opportunities and supporting regional Agency-led events.

TRAINING

Training and in-service sessions will focus on key messages, audiences and issues for all employees, particularly those who connect with the public frequently and/or supervise people who do.

PHASE 4 EVALUATION – ONGOING

With this framework, CV Strategies will build in an internal evaluation method that offers feedback and checks and balances on communications efforts. The Communications Master Plan will include ways to track and measure success. Methods will be determined based on the strategies themselves and the resources available to the organization after the implementation of the plan begins.

Using measurable data built into all components, whether follow-up surveys, a specific web address, social media analytics or impressions, we will determine if we're on target or need to course correct. Throughout the process, we will keep staff informed via regular phone, email and meeting updates. The result will be a holistic plan that provides measurable success every step of the way, effectively guiding communication efforts to meet goals.



ONGOING WORK APPROACH

CV Strategies relies on a proven method to develop and implement ongoing agency communications and outreach, based on more than a decade of experience. Every piece that we create, from written content to custom graphics and design, follows the RPIE approach - Research, Planning, Implementation and Evaluation. We have determined this is the most effective strategy for ensuring client goals are met and accomplished, without fail.

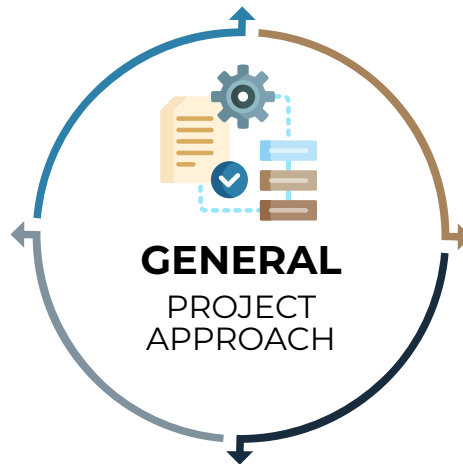
Below is the approach we follow to ensure effective and engaging ongoing communications:

PHASE 1 RESEARCH

- » Assess current and previous efforts and lessons learned
- » Check appropriate analytics for additional insight
- » Internal and external interviews/information gathering

PHASE 4 EVALUATION

- » Check milestones against KPIs
- » Adjust course as needed



PHASE 2 PLANNING

- » Determine goals and key performance indicators (KPIs)
- » Establish priorities and appropriate key messages
- » Develop workplan and schedule

PHASE 3 IMPLEMENTATION

- » Craft content
- » Design graphics
- » Leverage photography
- » Create/film video assets

