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CRM (Community Relationship Management),

ESSENTIAL ELEMENTS TO SUCCESSFUL RECYCLED WATER PROJECTS

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In a world where people cannot wait long for anything and demand excellence in everything, presenting a community with the task of evaluating a water or recycled water use project can be a tough prospect. Under the thumb of regulators, tight budgets and CEQA, successfully implementing any project becomes an unprecedented challenge.

Public education may not seem to be a likely place to start but just imagine if the public, policymakers, and your local media really understood that there was a problem to begin with and actually agreed with you about potential solutions. Fairy tale?

Defining the Problem

Is the problem you are faced with obvious? Easily understood? Would it be clear to a high school student? If not, reevaluate how the problem is presented until it resonates. Test its resoluteness with various community members. Use focus groups if necessary. Focus groups and/or surveys can reveal key concerns or misunderstandings early in the process. Such input can be pivotal as you craft your outreach messages and information.

If the problem does not seem real or urgent enough, stakeholders and affected public, businesses and the community-at-large may not understand what the fuss is all about, nor agree with new rates or water use practices.

It is tough to gather support and to ask that others make sacrifices including possible rate increases, if the problem to be solved is not crystal clear to all concerned.

Don't assume everyone understands recycled water quality, various levels of treatment or applicable regulations. Educating the public and providing adequate background information will help the public to understand what may be obvious to your staff engineers.

Once a Problem Statement has been crafted, and does indeed connect with your public, post it everywhere. Keep it out front--refer to it often. Don't assume everyone knows or has remembered, especially if it is a project that may take years to put into operation.

What are Possible Solutions?

Whatever the problem, there is likely to be more than one solution. How did the solutions get formed? Are you involving the public and stakeholders in the process of establishing potential solutions? If not, you may want to back track and be able to explain how possible solutions evolved. Explain cost benefits, environmental impacts and what percentage of a problem they may solve. Sometimes a combination of solutions can be as effective as one giant project.

Solutions are often not simple. Outside consultants may be required to make evaluations. Are their findings available to the public and in a language they can understand? Taking this extra step can alleviate gross misunderstandings.

Keeping Stakeholders in the Loop

Weather it is a Negative Declaration or a full-blown EIR, once your process begins, identify key stakeholders and include them in your outreach efforts. It is always best to be upfront and clearly state broad impacts. Advertise initial meetings in the newspaper and mail to lists of interested like-type issues or projects. Mail to entire affected geographic areas. Better to over notice than under notice in the initial phases of a study or implementing a project.

You don't want people standing up in front of a public hearing 9 months into the process saying they never heard about your project. Better to have the confidence of your policymakers knowing you threw the net out very broadly to make sure potentially affected segments of the community were more than adequately notified about your project.

What About Johnny-Come-Lately?

Regardless of how much you notice or how many public meetings you may have, there will always be newcomers to your process or project. Someone may have just moved into the area or just realized you are coming through their property. It is best to have background beginning materials that lay out how the problem and subsequent project evolved. These could be used all through a project as new people become aware and require initial information. Have key contact information readily available for public officials and project coordinators for people who feel they need more information.

Content is King

A glossary of terms, a definition of a law or regulation, web links to new legislation--there will always be something new to explain whether it is a newly listed endangered specie or a water treatment process. Don't expect everyone to know what it is or means. Explain it. Have in-depth reference information readily available. Always be forthright and demonstrate a commitment to full disclosure. Decisions will be tough enough to make without there being feelings of distrust or confusion on fundamental data.

No Turning Back - CRM is the New Mantra

In developing public projects, the old rule of "Decide, Announce, and Defend" is over. The public expects to have input, be kept informed and updated. A new bar has already been set in the private sector. Enterprise-wide software and communications systems are now a standard to better deliver services and products to a company's customers. These enterprise-wide systems are often referred to as "Customer Centric" because they can provide information "responsively" to customers from numerous customer contact points. When a customer calls, they can respond with real-time information unique to that customer. This type of delivery system, in the private sector, is called **Customer Relationship Management** (**CRM**). It improves the customer's experience of dealing with that company, enhances the services, manages the relationship, and allows for meaningful interaction thereby providing unique treatment and responsiveness to each individual customer.

In the public sector, it is possible to mirror this same type of functionality within your outreach structure. New tools tailored to cities and counties are being developed and implemented. Such systems can be referred to as **Community Relationship Management** (**CRM**). Because citizens are also consumers, they have come to expect 24 hour-a-day service and interactive delivery systems. Recycled water projects, in particular, can be politically charged and controversial as to public safety concerns and perceptions. They are ideal candidates for **CRM** and can best benefit from improved channels of communication to help ensure a sense of trust between the public and the lead agency of a project. More importantly, the public and stakeholders now expect that a

public project **WILL** be responsive and provide full disclosure. When this expectation is not met, they begin to question the very competency and integrity of the implementing agency and their contracted partners. A reliable communications and educational system can be as vital to a project as a reliable recycled water system itself.

New Questions to Ask

- Do you have a strategy for improving the way you interact with the community/citizens during the various phases of a project?
- What interaction channels are most cost effective in enabling you to deal with the public and stakeholders?
- What do you need to know about those who may be impacted to ensure you are able to offer the most appropriate service and interactive channels of communication?
- Are you able to provide consistent service and consistent responses to the public and stakeholders no matter what interaction channel they choose?
- Have you introduced new channels of interaction with proper support and trained staffing?
- Are there any weaknesses in your interactive communications system that could be strengthened?

Make Communications Easy and Available in Various Ways

By creating various channels to disburse and receive information, you make it easy to deal with and appear responsive to the community and stakeholders. Channels of communication may vary in different communities. Here are a few that would be ideal and are actually expected today:

- **Printed Materials:** Backgrounders, maps and project documents
- **Project Website**: Posting background information, schedules, maps, key documents and online modeling tools
- **Public Meetings:** Where either policymakers are discussing and making key decisions and/or information is shared, gathered and exchanged with the public and key stakeholders
- **Permission based E-mail Broadcasts:** Keeps those most interested constantly in the loop.
- **Project Call Center**: This could be as simple as a specific telephone number that everyone knows as the resource number that can be called day or night to ask project questions, or alert you to problems in the field.

Technology Should be Your Best Friend

You might say it is tough enough to conduct environmental, technical and economic studies to build a recycle water project - now I also have to have a sophisticated communications system in place? If you want your project to succeed, the answer is "Yes."

City, County and State governments are being affected by the one-to-one marketing trend provided consumers in other service industries. The community expects easy access, 24/7 communications options just like working with an airline or a bank. There are software tools available to help you deliver such services thereby making it easier for citizens to fill out forms, get answers to questions and to be kept informed of public meetings and key decision points. Use of new technologies such websites, website interactive tools, permission based e-mail broadcast and intelligent databases can enhance communication with citizens and stakeholders.

Websites Work for you 24 Hours a Day, 7 Days a Week

A website dedicated to your current project and its EIR process, design and/or construction phases could be a link to your existing homepage, or a fresh URL with a series of Web pages dedicated just to your recycled water project. Clearly state the project purpose, note a schedule of events and important public meetings, and make available key reports and studies. The site can also be a place where dialogue can occur. People can talk directly to you and your consultants or have a forum where questions can be asked as the process unfolds. In addition, if there are maps involved, various mapping concepts could be posted and made readily available to everybody involved in the process.

A database and a project Website combined will help to reinforce traditional forms of outreach, such as notification mailings, feedback reports, surveying, important documents in draft and final stages and any legally required notices.

Permission Based E-mail Broadcast

Respect privacy when using this channel. Do not show e-mail addresses to the full group. The best place to gather e-mail addresses and permission is at public meetings using sign-in sheets. Another clear method is via your project website where an interested party can request information be e-mailed to them.

You can also create subset groups, depending on the subject matter, such as technical groups, public officials, and/or people from a specific geographic area. There are many ways that this communication method could be utilized.

Power of a Call Center

A Call Center can serve many purposes. Callers can receive clarity on an issue, request documents and obtain scheduling information. Whoever answers this phone needs to be familiar with the project and key stakeholders to effectively respond and route calls to appropriate project team members. A Call Center is a "learning center." It allows you to have one-on-one conversations with people who may have unique viewpoints, key information or who may be adversely affected by your project. Sharing this information with key team members can help in critical time-sensitive decision-making and can even reshape ideas. Listening to public reaction and adjusting your outreach materials can prevent large-scale misunderstandings. Feeding citizen and stakeholder input into a project database allows for such information to stay relevant over time and to be shared across the spectrum of project team members as the project evolves. This is a simple idea that can be very powerful.

Utilizing a Smart Database

A project database allows you to record a history of each individual's interaction with a process. You can note meetings attended, documents sent, and records of telephone and e-mail dialogue. More importantly, it ensures that the right people receive the right information throughout the project, and you have a record of it.

Starting with your current mailing list, the database might have various segments depicted based on interest or impact, such as: agriculture, traffic, utilities, technology, tourism and business. Unique outreach messages could then be sent to these segments, as various topics need to be addressed. Additional interests are easily added. Sorting by category, geographic areas, level of interests, and alphabetically now becomes possible. Such a database can also note preferences on how each individual prefers to receive information, either by mail, email, fax, or phone.

Studies have shown an increase in response to messages sent through a person's preferred channel of communicating.

Best yet is being able to share this information across a network for use by key members of your project team. Such access allows full use of the data for a myriad of uses such as quick mailing to one sector of a project or key stakeholders. Retain Right of Way data so commitments can be retained through the live and phases of large-scale projects that take years to build.

Successful Recycled Water Projects of the Future

Successful recycled water projects of the future will be using all of these channels of communication and more for the simple reason that the public will demand and insist on them. Just as in the private sector, competition drove such services and caused them to evolve; public projects have also begun feeling this impact. Recycled water projects should not and cannot ignore them. Adopting such practices early on will alleviate public frustrations and create a better atmosphere of trust. It is already tough enough to sell, design and build recycled water projects. Improved communications, public education, and informed stakeholders who feel they have been responded to, should smooth the way and enhance a more successful outcome.

Great Examples of Good Use of Web Sites Dedicated to Specific Public Projects

- City of Santa Rosa, CA, Geysers Pipeline Project --A unique project that will pump millions of gallons of recycled water to geothermal wells to generate electricity for about 100,000 households. www.geysersproject.com
- Monterey County, CA, General Plan Update www.co.monterey.ca.us/gpu
- City of Santa Rosa, CA, Incremental Recycled Water Program www.recycledwaterprogram.com
- Town of Windsor, CA, Residential Dual Piping Project, Vintage Greens www.ci.windsor.ca.us/3089.html

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3. Kimberlee Roth, "Stemming the Flow--CRM Helps Santa Rosa, CA Keep Track of Citizens Affected by its Pipeline Project", Marketing 1to1, January/February 2001