

MARKETING PLAN



Clean and Drinking Water State Revolving Fund Programs Division of Financial Assistance State Water Resources Control Board



We've got the **green...**
to keep California's **water clean.**
CLEAN WATER STATE REVOLVING FUND



Protect Our Health from Source to Tap
DRINKING WATER STATE REVOLVING FUND

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INTRODUCTION

This Marketing Plan has been developed to meet the goal of increasing awareness and building confidence in the Clean Water State Revolving Fund (CWSRF) and Drinking Water State Revolving Fund (DWSRF) programs to improve California's water quality. The CWSRF and DWSRF programs provide below-market rate financing for the planning/design and construction of wastewater treatment and water recycling facilities, public drinking water infrastructure systems, implementation of nonpoint source and storm drainage pollution control solutions, and development and implementation of estuary plans to protect and promote the health, safety, and welfare of all Californians.

As of June 30, 2015, the total available to the CWSRF for financial assistance since inception (1989) of the Program was \$7.315 billion, of which approximately 108 percent of the available funds were committed to projects. The total available to the DWSRF since its inception in 1996 was \$2.08 billion, of which approximately 108 percent of the available funds were committed to projects.

The CWSRF and DWSRF programs have clearly made significant contributions to ensure clean and healthy water for Californians. However, there is still a need for infrastructure improvements and upgrades, which usually cannot be completed without financial assistance. Therefore, it is essential for the CWSRF and DWSRF programs to increase its outreach efforts to promote awareness and benefits of the programs throughout the state. Increasing and improving marketing and outreach strategies will also help direct funds to where they are most needed (i.e. small and or disadvantaged communities) and will ensure that the CWSRF and DWSRF have the greatest impact on state water quality. The CWSRF and DWSRF have funds available for a wide variety of projects and continue to look for ways of streamlining and simplifying the application and process to improve customer service and finance projects expeditiously. This marketing plan will guide the CWSRF and DWSRF staff to increase its marketing efforts to reach out to and encourage new and repeat customers to use these programs as their main source for financing their water quality projects. This plan is an evolving document that will be updated on an annual basis to ensure the marketing and outreach efforts are achieving its goals and objectives.

(NOTE: The CWSRF and DWSRF will be referred to as SRF throughout the remainder of this Marketing Plan.)

I. GOALS and OBJECTIVES

The SRF staff will pursue this plan to accomplish the following goals and objectives:

- A. Expand program awareness and inform the public of the SRF's wide variety of funding options, benefits, and program improvements;
- B. Enable environmentally beneficial projects that otherwise might not be undertaken;
- C. Inform borrowers of the benefits of becoming a frequent financier (repeat borrower);
- D. Provide excellent customer service and a positive experience to potential and existing borrowers;
- E. Develop relationships and trust with communities and water systems to encourage them to pursue the SRF for their next and future projects;
- F. Build and maintain relationships with service providers and community oriented organizations – engineers, financial advisors, bond counsels, community non-profits, and advocacy organizations (decision makers); and
- G. Educate and engage Regional Board and Division of Drinking Water staff on the SRF updates and benefits so they can inform their communities and water systems.

II. MESSAGES

Marketing and outreach efforts will focus on the following messages to the SRF's target audience:

A. Cost savings

The SRF offers financing that is below market interest rates. The low rates provide a cost savings to communities and water systems compared to other financing options.

The interest rate for the DWSRF is generally fifty percent (50%) of the average interest rate paid by the state on general obligation bonds issued in the prior calendar year. Projects can be financed up to 20 years (30 years or the useful life of the project for water systems serving disadvantaged communities, and eligible public water systems with U.S. EPA approval).

The interest rate for the CWSRF is one-half ($\frac{1}{2}$) the most recent General Obligation Bond Rate at the time of funding approval. Projects can be financed up to 30 years or the useful life of the project.

B. Significant funds available for a wide variety of project types

There are significant funds available for a wide variety of projects including wastewater and drinking water treatment plants, distribution systems, interconnections, consolidations, pipeline extensions, water meters, sewer collectors and interceptors, combined sewers, septic to sewer conversions, storm water reduction and treatment, and water reclamation projects. Funding is also available for all nonpoint source

projects or programs, and development and implementation of estuary conservation and management plans.

C. Funding limit

There is no cap on the amount of funding or the amount of disbursement per year. Projects are financed based on the respective SRF's cash flow and the recipient's approved credit limit.

D. It's easy to apply

Applications are accepted at any time; there is no deadline. The application can be completed and submitted through the State Water Board's online application system, Financial Assistance Application Submittal Tool (FAAST). It can also be submitted via email, hard copy, or CD.

E. Financing is quick

The goal is to provide a financing agreement in nine months or less of receiving a complete application and to fulfill disbursement requests within 30 days.

F. Projects create jobs in the community & stimulates the economy

In addition to improving water quality, these projects create jobs within the community and enhance the overall economy. The projects not only directly create jobs through construction and planning, but also support those that rely on safe and clean drinking water, water for their livelihoods (such as the fishing industry) and help support community sustainability.

G. We're here to help

SRF staff is available to answer any questions about the programs and the application process. This can be done by phone, email, written correspondence, or in-person.

III. TARGET AUDIENCE

We strive to reach out to as many potential applicants as possible, as well as those who have a direct connection with (and influence) potential applicants. We have identified the target audience for this Marketing Plan as follows:

A. Small and/or Disadvantaged Communities

A disadvantaged community (DAC) is generally defined as a community (or service area of a community water system) where the median household income (MHI) is less than 80 percent (80%) of the statewide MHI or the community sewer rate is more than four percent (4%) of the community's MHI. A severely DAC is where the MHI is less than 60 percent (60%) of the statewide MHI.

A small community is generally defined as a community with financial hardship and either: (1) a population of 20,000 persons or less for wastewater purposes; or (2) a drinking water system serving a population of 10,000 persons or less (small water system).

Small and disadvantaged communities face specific challenges related to their drinking water and wastewater systems. They generally have higher per capita costs and face the additional burden of lower household incomes. They typically struggle with the

application process as well as project planning, design, construction management, and project operations. Additionally, the requirements appear overwhelming to the small and/or DAC audience. The marketing approach should recognize these difficulties in order to be beneficial to them. Highlighting the availability of SRF staff to assist in the application process would attract small DACs to the program. A more personalized marketing tactic would be the most effective approach to reach out to and draw small and/or DACs to finance with the SRF.

Providing assistance and outreach to the small and/or DACs has been a focus for the State Water Board. Refer to the *State Water Board's Clean Water and Drinking Water Capacity Development Strategy* at:

http://www.waterboards.ca.gov/water_issues/programs/grants_loans/sustainable_water_solutions/index.shtml.

Since the State Water Board now administers the DWSRF, on March 27, 2015, the Governor created the [Office of Sustainable Water Solutions](#) (OSWS) to serve the drinking water and wastewater needs of small and DACs. The OSWS provides technical and financial application assistance, as well as outreach and education.

B. Tribal Communities

A Native American tribal government or an authorized Native American tribal organization having jurisdiction over disposal of sewage, industrial wastes or other waste, or owns a public water system is an eligible applicant for SRF financing. Building trust and relationships between the State Water Board and the tribal communities could attract more tribal governments and organizations to pursue the SRF for their future projects. With the assistance of the Office of Public Participation, the Marketing and Outreach team plans to continue to learn more about how to better serve Tribal needs. As we reach out to tribal communities our goal is to improve our communication and working relationships with them.

C. City and County Managers/Administrators

City and county managers/administrators are the decision makers for their communities. This target audience would be interested in the cost savings for their city/county and the benefits that the SRFs would provide for their communities. Reaching out to city/county managers/administrators at the earliest stage would be the most beneficial as they are involved with planning their communities' future investments. The most effective marketing approach would be to focus on the numerous types of eligible projects and the financial and environmental benefits that financing with the SRFs can provide for their communities.

D. Agency Directors

Agency directors (of public works, sanitation districts, water districts, utility districts, public water systems, etc.) oversee the majority of SRF recipients. This is our largest target audience. Continuing to market to this audience will not only draw new applicants, but also encourage them to become a frequent financier (repeat customer). Similar to city and county managers/administrators, the marketing approach to this target audience should focus on the cost savings and benefits for their communities, but also a simplified application and an efficient application process.

E. Elected Officials

Elected officials (mayors, council members, board of supervisors, etc.) are not only interested in cost savings for their communities, but also the sustainable benefits that the SRF would provide their city/county, such as increasing the economy, job market, and public health. The marketing approach to this target audience should focus on the overall benefits of financing with the SRF, rather than technical details of the program.

F. Service Providers, Community Non-Profits, and Advocacy Organizations

Service providers (consultants, contractors, engineers, financial advisors, bond counsel, etc.), community non-profits, and advocacy organizations are aware of numerous projects that may benefit from SRF financing. They are an excellent tool for extending the awareness and benefits of the SRF programs to potential applicants. It is essential that our marketing messages to this target audience are clear so they forward the program information and recommend the SRF program(s) to their contacts and associates.

IV. TASKS/TACTICS

To achieve the goals of this Marketing Plan, the SRF staff will use the following types of marketing tactics: (A) face-to-face outreach, (B) non-face-to-face outreach, and (C) program materials.

A. Face-to-Face Outreach

1. California Financing Coordination Committee (CFCC)

Since 1998, the State Water Board has been an active member of CFCC. The CFCC is a voluntary, ad hoc group of public agencies that have similar funding programs. Currently, the CFCC consists of seven funding members: State Water Board, CA Department of Water Resources, CA Department of Resources and Recycling Recovery, CA Department of Housing and Community Development, U.S. Department of Agriculture Rural Development, U.S. Department of the Interior Bureau of Reclamation, and California Infrastructure and Economic Development Bank. These agencies identify opportunities to leverage resources, particularly for Small DACs. The CFCC organizes and hosts free funding fairs statewide each year to provide information about currently available infrastructure grant, loan, and bond financing programs and options available for different project types. The funding fairs also provide an opportunity for attendees to speak directly with the various agency staff about specific projects and issues affecting their community.

The State Water Board will continue to participate as a CFCC member because the funding fairs are an effective outreach tool for the SRF programs. The workshops, which are held approximately five to seven times a year, are well attended by approximately 50 to 100+ public works and local government representatives, economic development and engineering professionals, officials from privately owned facilities, water and irrigation district managers, financial advisors, and project consultants at each location. The SRF programs have reached a large number of recipients through these funding fairs.

As a member of CFCC, the SRF staff's responsibilities include the following:

- Participate in monthly planning meetings between November and April;
- Research and reserve site location(s) for the fairs;
- Prepare event material (i.e. speaker name tags, table tents, work book);
- Travel to and present at the approximately seven funding fairs throughout the state each year (generally April to October);
- Answer attendees' questions face-to-face at the SRF table;
- Man the on-site registration table at each fair; and
- Gather and summarize surveys from each funding fair

2. Regional Funding Fairs

In the last few years, the State Water Board has also organized a regional Los Angeles Infrastructure Funding Fair (LA Fair). The LA Fair is similar to the CFCC funding fairs, but with slightly different participants who want to either reach more of the southern California audience or the majority of their financing projects are in the southern California area. Although the State Water Board organizes the LA Fair annually, the participants vary each year. The 2015 LA Fair participants included the State Water Board, California Conservation Corps, California Infrastructure and Economic Development Bank, U.S. Department of the Interior Bureau of Reclamation, California Department of Water Resources, Southern California Edison, and Southern California Gas Company. The CFCC funding fairs are typically located in more rural areas. This additional fair has been created to reach out to the large population of potential applicants in the Los Angeles area.

Similar to the CFCC funding fairs, the agencies provide information about currently available infrastructure grant, loan, and bond financing programs and options available for different project types, as well as provide an opportunity for attendees to speak directly with the agencies' staff about specific projects and issues affecting their community. The LA Fair is typically attended by approximately 50 government representatives, engineers, water and irrigation district managers, financial advisors, and project consultants within the Los Angeles area.

As coordinator of this event, the SRF staff's responsibilities include, but are not limited to, the following:

- Research and reserve the site location;
- Prepare flyer;
- Advertise the event (Lyris, web site, flyers);
- Prepare a roster of registrants;
- Develop and maintain the online registration (i.e. Eventbrite.com);
- Prepare event material (i.e. speaker name tags, table tents, work book);
- Travel to and present at the funding fair;
- Answer attendees' questions face-to-face at the SRF table;
- Man the on-site registration table; and
- Gather and summarize surveys at the end of the funding fair

3. Conferences/Expos

The SRF staff has participated in various industry conferences and expos over the years. At these events staff have either participated as a presenter (presented SRF and Proposition 1 information), exhibitor (managed an information table), or both. This type of face-to-face communication is an excellent outreach tool that helps us reach a large part of our target audience.

- a) **Presenter:** Similar to the CFCC funding fairs, presenting at these events is a great opportunity for us to inform the public about the SRF programs, as well as provide updates about the programs. The main objective of the presentations is to help draw people to the SRF programs. We will reevaluate our presentations to ensure they focus on our messages (i.e. cost savings, excellent financing terms for a wide variety of projects), as well as update them with the most current information. Additionally, depending on the audience, the presentations will be modified to tailor to the needs and priorities of the specific audience.
- b) **Exhibitor:** Participating as an exhibitor allows us to provide information and answer any questions face-to-face. Those interested are given marketing material (i.e. CWSRF or DWSRF brochure, a State Water Board promotional item, and business card) to review or take back to their office decision makers. As an exhibitor we are also able to network with other exhibitors who may benefit or know someone else who may benefit from SRF financing.

See Appendix A for a list of events the SRF staff typically participates in each year. This list will be continuously updated as SRF staff is invited to present information at conferences and workshops. Additionally, the Marketing and Outreach team continues to research new conferences to participate in to maximize outreach efforts to the greatest extent possible.

4. Outreach Workshops

In 2008 and 2010, the CWSRF hosted workshops throughout the state for both the public and Regional Water Board staff. The main objectives of the workshops were to increase program awareness and seek potential applicants.

Each workshop included two sessions. The first session was for the public, which provided program information and updates, as well as steps on how to apply for financing. The attendees were also able to discuss specific projects with the CWSRF staff.

The second session was specifically for Regional Water Board staff. These sessions allowed CWSRF staff to educate the Regional Water Board staff about the Program so they can inform potential applicants. CWSRF staff explained how to address regional water quality issues through CWSRF financing. These sessions were also helpful for the CWSRF staff to get educated on the needs of the various communities. Because the Regional Water Board staff has rapport with community groups, they were able to provide the CWSRF staff with specific information of potential needs for financial assistance. These sessions were well attended by the public, but not as popular for Regional Water Board staff.

Since 2010, many improvements have been made to the CWSRF Program. Additionally, as of July 2014, the DWSRF was transferred to the State Water Board. Therefore, the SRF staff plans to hold similar outreach workshops in the future to provide program updates and changes (i.e. new streamlined application and process, policy changes, how to apply with FFAST, extended term financing, Proposition 1). It is essential to remain connected with the regions and Division of Drinking Water to re-introduce the SRF programs to the public and inform them on how SRF financing can improve their communities. Additionally, these workshops will help build the relationship between the SRF and Regional Water Board and Division of Drinking Water staff. Regional Water Board and Division of Drinking Water staff have an established relationship with communities and know which projects are in need of improvements because they perform inspections to ensure facilities are in compliance. They are excellent resources for outreach and developing a pipeline of projects.

If travel restrictions and/or costs are an issue, these workshops will be replaced by webinars.

5. Outreach Workshops for Small and/or DACs and Tribal Communities

It is a priority of the State Water Board to help ensure that small and/or disadvantaged communities have the resources needed to protect water quality and public health. Therefore, the SRF programs would like to increase financial assistance to Small DACs, as well as tribal communities. Because of financial costs or other challenges, these audiences may not be able to attend the outreach workshops mentioned above. Many Small and/or DACs and tribal communities who have attended past workshops have not pursued SRF financing because they felt the requirements too overwhelming. Many small communities lack the resources and in-house financial and technical expertise necessary to apply for financial assistance. They are in need of personal assistance to apply for grants and loans.

a) **Small and/or DACs:** On March 27, 2015, the [Office of Sustainable Water Solutions](#) (OSWS) was created under the State Water Board's Division of Financial Assistance (DFA) to specifically serve the drinking water and wastewater needs of small and/or DACs. Their focus is to address the financial and technical assistance needs, particularly for small drinking water and wastewater systems and DACs. The State Water Board has contracts in place with non-profit technical assistance providers: Rural Community Assistance Corporation (RCAC), California Rural Water Association (CRWA), and Self Help Enterprises (SHE) to provide drinking water and wastewater-related technical assistance to small DACs. This includes, but is not limited to:

- Preparing financial assistance applications
- Reviewing proposed project alternatives to assist in identifying low-cost, sustainable approaches
- Participating in community outreach, awareness, and education
- Conducting Technical, Managerial, Financial capacity assessments for water systems
- Training for water and wastewater treatment plant operators

The SRF staff plans to pursue other avenues to provide hands-on assistance to these communities with their funding needs. For example, provide additional workshops within specific Counties, to personally assist interested parties in completing and submitting an application so the small DACs are included on the Project List, assigned a Project Manager, and eventually financed. We will also inquire with other agencies and non-profits on successful tactics they have used to share information with small and/or DACs.

- b) Tribal Communities:** The State Water Board Office of Public Participation periodically hosts training workshops for tribal communities who are interested in learning more about the State Water Board's programs. The SRF has participated in these workshops to present SRF information and its benefits to the tribal communities. Additionally, the workshop has an outreach table at events to answer any questions or discuss specific projects with interested tribes one-on-one.

B. Non Face-to-Face Outreach

1. Telemarketing

Using the Contact Management List¹, the Marketing and Outreach team periodically (as time permits) calls contacts each day to promote awareness of the CWSRF Program and benefits, and inquire if they are in need of CWSRF financing for their planned project(s). This is a way to build and maintain relationships with these contacts in anticipation that they will choose the CWSRF to finance their future water project(s). We will follow-up with these contacts on an annual basis as community/agency personnel may change.

The Contact Management List is currently for potential CWSRF applicants. The Marketing and Outreach team will discuss developing a similar list to outreach to potential DWSRF applicants.

2. Website

The CWSRF and DWSRF websites are the top marketing and outreach tools. It is usually the first place interested parties go to for general SRF information. The Marketing and Outreach team makes it a priority to ensure that the most up to date information is posted. Equally important are the visual appearance and ability to easily navigate around the website. Users should be able to easily find the information they are looking for. Therefore, the Marketing and Outreach team continually works on improving the SRF websites to enhance its appearance and create a more user friendly site. Some improvements include:

- Rearrange information under subject tabs (i.e. SRF Basics, How Do I Apply, SRF Success, Policies/Plans/Reports, Forms & Instructions, Templates & Guidance, etc.)

¹ In the later part of 2013, the Marketing and Outreach team created a Contact Management List consisting of interested parties who have submitted environmental documents to the State Clearinghouse, but have not submitted a CWSRF Application. This list will be expanded to include those we meet at conferences/workshops, who have inquired about the Program via email or telephone, registered for (or attended) CFCC workshops, and those who are on the CWSRF Project List and have an Application Status of "Incomplete" or "Not Submitted".

- Add pictures of featured projects (to be changed monthly or when a project receives financing approval)
- Add recipients' testimonials/success stories (videos or quotes)
- Add *Introduction to CWSRF* video
- Add announcements of CFCC workshops and other SRF outreach events

As feedback is received and program information changes, the web pages are amended as needed. It is important that all the essential information is available on-line and easily located so we can quickly direct potential applicants in that direction. Having an effective website will also assist in decreasing the amount of phone and email inquiries received by SRF staff.

3. Online Guidance

In 2014, the SRF staff completed the development of on-line tutorials to assist applicants on using the State Water Board's [Financial Assistance Application Submittal Tool \(FAAST\)](#) to apply for SRF financing. These tutorials can help turn potentially interested communities into applicants as they provide a visual of an easy application process.

4. Social Media

The Marketing and Outreach team works with the Office of Public Affairs to promote the SRF program and announce program updates on social media (i.e. Twitter). Additionally, the FAAST tutorials mentioned above are on the State Water Board's YouTube site at <http://www.youtube.com/user/BoardWebSupport>. These media sites will assist us in monitoring the amount of interest we receive.

5. Mobile Optimized Website

DFA and Division of Information Technology staff are working to develop a mobile optimized website to improve data access for the public. The project will specifically benefit remote, disadvantaged communities who lack desktop internet access and rely solely on mobile devices to access funding information. It is anticipated that the mobile optimized website will be launched in 2017.

6. Publication Articles

The Marketing and Outreach team will begin researching various environmental and financial related agencies or organizations to utilize their publications and/or websites to place SRF informational articles to promote the programs. We will begin inquiring with our CFCC partners.

6. Lyris

The Lyris is the State Water Board's electronic mail software used for sending announcements, program updates, etc. to a list of interested parties. The Marketing & Outreach team are List Administrators for the SRF Lyris Lists and authorized to send out announcements, program updates, etc. This is the quickest, easiest, and most cost effective tactic to reach out to interested parties. Generally, any information sent out through the Lyris is also posted on the applicable SRF website.

C. Program Material

1. Brochures

a) CWSRF and DWSRF General Information Brochures

The general information brochures provide potential applicants with basic information regarding applicant and project eligibility, how and when to apply, funding terms, and contact information. They are used as follows:

- Give to applicants at project kick-off meetings;
- Send to those on the Contact Management List, League of CA Cities Directory, and the California State Association of Counties roster;
- Distribute at conferences, workshops, and any events SRF staff is a presenter and/or exhibitor; and
- Provide a supply for the public in the Cal EPA Information Center, all Regional Water Quality Control Board offices, and all CFCC partners' offices

The brochures are also posted on the State Water Board's website.

b) Subject Specific Brochures/Fact Sheets

Besides general information brochures, the SRF staff created or plans to create different brochures/fact sheets for specific audiences and/or project types. These include, but are not limited to:

- Water recycling projects (update)
- Planning or design projects
- Non-point source projects (agriculture, forestry, urban areas, marinas, etc.)
- Small and/or disadvantaged communities
- Highlight benefits and achievements: cost-savings (compare SRF loans to conventional loans, revenue bonds, etc.), frequent financier (repeat borrower) advantages, testimonials, etc.
- Tribal communities – A booklet entitled [Funding for California Indian Tribes](#) was created to identify all State Water Board funding sources available to California's Indian Tribes, which includes information on the SRF programs.
- Green Project Reserve (GPR) – A fact sheet was developed to provide information on the loan forgiveness available for CWSRF GPR projects.

2. Outreach Letters

The Marketing and Outreach team developed an outreach letter to further market the CWSRF program. The letter gives general CWSRF program information and directs the reader to the CWSRF website for further information and how to apply. The letter also informs the reader that the CWSRF has significant funds available to help them finance their water quality project(s). The letter is sent out on an annual basis, or as time permits, to the following:

- Interested parties on the Contact Management List

- The League of California Cities Directory of mayors, council members, and city department leaders
- Those who receive a Notice of Violation or formal enforcement letter (will have to obtain a list from the Regional Water Boards). Another option here would be for the Regional Water Boards to send either the letter or our brochure.

Note: Prior to sending out a letter, the Marketing & Outreach team verifies if we've reached out (telephoned or sent a brochure) to the addressee during the past year. We do not want to over solicit the program as people may lose interest.

The Marketing and Outreach team will develop a similar outreach letter for potential DWSRF recipients.

3. **Newsletter**

The Office of Sustainable Water Solutions creates a bimonthly newsletter (available in English and Spanish) of hot topics, project highlights, general and updated information, reminders, etc. for the SRF small communities. The Marketing and Outreach team plans to develop a similar newsletter geared towards the general SRF audience. The newsletter will include the following topics:

- Program updates
- Hot topics (address frequently asked questions or issues)
- Project highlights
- Testimonials/success stories
- Application reminders (to avoid delays in the review process)
- Upcoming outreach events

4. **Annual Report**

The SRF programs produce an Annual Report of the program's accomplishments each State Fiscal Year (SFY). The report also lists the projects financed in that year as well as describes how the State Water Board met the objectives for the program as identified in the previous Federal Fiscal Year's Intended Use Plan. This report is annually prepared as required by the U.S. Environmental Protection Agency. As recommended by Northbridge, the SRF Annual Reports also serve as an outreach tool to market the successes of the SRF programs. Therefore, with the assistance of the Graphics Unit, the Annual Report is professionally designed and printed for use as marketing material. Hard copies are printed and distributed to applicants at project kick-off meetings, workshop and conference attendees, and any other interested parties. The Annual Reports are also available in electronic form on our web site.

Not all of the above mentioned marketing and outreach tactics are effective for each of our target audiences. The following table illustrates which marketing tactics are geared towards each type of target audience.

TARGET AUDIENCE

MARKETING / OUTREACH TACTIC	City/County Managers/ Administrators	Elected Officials	Agency Directors	Tribal Communities	Small Disadvantaged Communities	Service Providers
Annual Report	X	X	X			
CFCC/Regional Fairs	X	X	X	X	X	X
Conferences/ Expos	X	X	X			X
CWSRF & DWSRF General Info Brochures	X	X	X	X	X	X
Lyris	X	X	X	X	X	X
Mobile Optimized Website	X	X	X	X	X	X
Newsletter	X		X	X	X	X
Online Guidance	X	X	X	X	X	X
Outreach Workshops/ Webinars	X		X	X	X	X
Outreach Workshops for Small and/or DACs & Tribes				X	X	X
Publication Articles	X		X	X		X
Social Media	X		X			X
Outreach Letters	X	X	X	X	X	
Subject Specific Brochures/Fact Sheets	X	X	X	X	X	
Telemarketing	X		X	X	X	
Website	X	X	X	X	X	X

IMPLEMENTATION SCHEDULE

The current Marketing and Outreach team consists of one manager and two analysts. Along with the OSWS and SRF staff, we will strive to accomplish the tasks in the scheduled timeframe as outlined in this plan. However, the completion dates on each task may vary due to other workload, priority changes, and staff limitations. Refer to Appendix B for the projected timeline to implement these marketing and outreach tasks.

V. MEASUREMENT

Measuring the results of our marketing and outreach efforts is essential to gauging the success of this marketing plan. We plan to use the following methods to track the progress of the marketing and outreach tactics used in this plan.

A. **Customer Satisfaction Survey**

To obtain feedback on the application and process, the CWSRF staff created a Customer Satisfaction Survey. The survey requests information on how the

applicant heard about the CWSRF program, staff's customer service, application process, overall CWSRF experience, and requests comments and suggestions. The survey was created using the online survey software, SurveyMonkey, which collects the responses and provides results with a variety of export options. The survey is located at <http://www.surveymonkey.com/s/cwsrfsatisfaction>.

The results of the survey is monitored on a quarterly basis to assist us in determining how applicants found out about the CWSRF program and what areas we need improvement to increase the appeal of the CWSRF to other potential applicants. The Marketing and Outreach team has begun implementing a similar survey for DWSRF recipients.

As the above mentioned survey is sent to CWSRF recipients who have received their executed financing agreement, the Marketing and Outreach team is developing a similar survey for those who have not received an executed financing agreement- they may have been denied, searching for information, in the application process, etc. This survey will rate customer satisfaction as well as website satisfaction. For the continued success of the SRF programs it is essential to continuously obtain feedback on our customer service and website and incorporate the needed improvements.

B. Applications Received

As part of the SRF Marketing Plan's goals we want to attract new borrowers, retain repeat borrowers, and increase the flow of applications received. Through LGTS we will monitor the amount of applications received and how the applicant became aware of the SRF program on a quarterly basis and use this information to analyze the effectiveness of our marketing efforts. This will also measure the types of projects received to gauge where our marketing efforts are successful or needs improvement.

C. Survey General Inquiries

The SRF Programs have a general email and voicemail box for the public's questions and other inquiries. The Marketing and Outreach team is responsible for ensuring that the public receives a response to their question(s) within two business days. As part of the response we plan to survey the public on how they found out about the SRF programs. This information will assist us on identifying which of our marketing tactics are more effective than others.

D. Social Media Visits

Once the usage of the social media tool is fully implemented, the Marketing and Outreach team will work with the Office of Public Affairs to measure its success by tracking the number of visits it receives.

Using these tools to measure goals on a regular basis will allow us to continually reevaluate the effectiveness of our marketing and outreach efforts and guide us in improving this marketing plan. This information will also assist us on where we need to shift our outreach efforts, and amend the plan as needed to enhance the outcomes and achieve state water quality goals.



EXHIBIT A

TYPICAL SRF MARKETING & OUTREACH EVENTS

Event	Focus	Attendees	Marketing Tactic	Fees*
Association of California Water Agencies Conference & Exhibition	promote the development, management and reasonable beneficial use of good quality water at the lowest practical cost in an environmentally balanced manner	1600-1800 directors, general managers, elected officials, attorneys, communication professionals, engineers, financial managers	presenter	-0-
California Rural Water Association Education & Exhibitor Expo	network with professionals presenting the latest products and services	personnel from California's rural water and wastewater systems – operators, owners, managers, and board members	presenter and exhibitor	\$600
California Special Districts Association Annual Conference & Exposition	provide the public with affordable funding opportunities to assist special districts with their drinking or wastewater infrastructure projects	leaders of special districts	presenter and exhibitor	\$750
California Water Environment Association Annual Conference	enhance the education and effectiveness of California's wastewater professionals; discuss the most current issues facing the water and wastewater treatment field	wastewater treatment plant operators and supervisors; district, city and county managers and directors; consultants; engineers	presenter and exhibitor	-0-
CFCC Funding Fair (5-7 workshops)	educate the public and potential customers about the financial and technical resources available for various types of infrastructure projects	cities, counties, districts, consultants, financial advisors, engineers, economic developers interested in funding opportunities	presenter and informational table	-0-
League of California Cities	enhance knowledge and skills, exchange information and combine resources to influence policy decisions that affect cities	1800 + decision makers: mayors, council members, city managers, city attorneys, city clerks, finance directors, human resource directors, safety officers	exhibitor	\$1,400
Regional Funding Fair – Los Angeles	educate the public and potential customers about the financial and technical resources available for various types of infrastructure projects	cities, counties, districts, consultants, financial advisors, engineers, economic developers interested in funding opportunities	presenter and informational table	-0-
WaterReuse California Annual Conference	provide information on design, management, operation, and use of water recycling facilities and projects in California	water recycling leaders, public agency representatives, elected officials, consultants, operators, environmental groups	presenter and informational table	\$750

*Does not include travel costs.

EXHIBIT B

IMPLEMENTATION SCHEDULE

Marketing/Outreach Task	Projected Completion Date	Status/Comments
Annual Report (2015-2016)	CWSRF- October 30, 2016 DWSRF – January 1, 2017	kick off meeting June 2016
Brochures CWSRF & DWSRF	complete	complete
CFCC	May-October 2016	workshops in process
Conferences/Expos	continuous	continuous
Customer Service/Website Satisfaction Survey	complete	complete – will monitor results
Lyris	continuous	continuous
Mobile Optimized Website	2017	kick off meeting June 2016
Newsletter	December 2016	will begin outline mid-2016
Online Guidance	complete	complete
Outreach Letters	annually – next mailing February 2017	pending until next mailing
Outreach Workshops (or Webinar)	pending	will begin as needed & time permits
Outreach Workshops for Small &/or DACs & Tribes	pending	available to assist OPP & OSWS as needed
Publication Articles	continuous	currently researching
Regional Funding Fair	August 2016	planning in process
Social Media	continuous	continuous – work with OPA
Subject Specific Brochure	pending	will begin as needed
Telemarketing	continuous	continuous
Website – add project success stories/testimonials	CWSRF complete – will refresh annually DWSRF – October 2016	will begin project in June 2016
Website – add “Intro to CWSRF” video	July 2016	project in process