MINNEHAHA CREEK
WATERSHED DISTRICT
QUALITY OF WATER, QUALITY OF LIFE

Title:	MCWD Outreach Implementation - Discussion
Prepared by:	Name: James Wisker
	Phone: 952.641.4509
	Jwisker@minnehahacreek.org

Purpose:
To provide background information to support the Board's ongoing discussion of the District's Outreach strategy, as it moves towards implementation.

Background:
The Minnehaha Creek Watershed District is engaged in the process of rebuilding its outreach program from the ground up, to support the District's strategic approach and priorities – detailed in *A Balanced Urban Ecology.* This has involved methodically working through the following process.

1. Discovery – review and synthesis of all relevant past information related to MCWD outreach
2. Research – completing qualitative research for MCWD's audiences, and the effectiveness of past programming
3. Insights – developing a deeper understanding of how the research informs MCWD's future outreach needs
4. Strategy – cultivating outreach options and direction that support the District's mission and strategic priorities
5. *Implementation – confronting tradeoffs, setting priorities and developing operational plans to execute

*The District has moved out of strategy discussions and is now considering factors related to implementation

In January the Committee established consensus surrounding the major strategic shift for MCWD's outreach – the goals, key audiences, key channels, and the primary focus of the program, and the changes to the District's legacy community engagement programs.

February 13, 2020 Operations and Programs Committee
At the February 13 Committee Meeting, staff will outline areas that need consideration in order to effectively implement the strategic direction that has been developed. These considerations encompass, in relative order of priority:

- **Human resources:** The skills, positions and structure of the program
- **Focus of work:** The priority initiatives the program will align around, execute, or shift
- **Operations:** The workflow, tools, trainings, evaluation and reporting

The intent of the discussion is to broadly outline the things that need considering to successfully implement the strategic direction.

Emphasis within the discussion will focus on the skills, positions and structure of the program, as well as the possible timeline for hiring – as staffing the program will be a prerequisite to taking the other actions that are outlined.

Supporting documents (list attachments):
Implementation Considerations for MCWD Outreach Plan

[DRAFT]
Implementation Considerations for
MCWD Outreach Plan

Introduction

MCWD is in the midst of a 2-to-3 year process to systematically reorient and align its programming around its *Balanced Urban Ecology* approach. One significant component of this effort is the restructuring of the District's Outreach program, formerly known as Education and Communications.

This document summarizes the key insights and consensus thus far regarding the strategic direction and requirements for successful implementation. These insights are a result of an intensive research process that included input from key stakeholders, residents, Board of Managers, CAC, and staff, as well as an analysis of program history and effectiveness.

Contents

Strategic Direction

The strategic shift in MCWD's outreach will principally move the District away from broad based awareness and education, towards targeted outreach focused on select audiences whose support is needed to advance the organization's key initiatives.

Such a transformational change requires the District to rethink its audiences, tactics and channels. This realignment and the principles that will guide the realignment, are outlined below:

From broad awareness to context-specific partnership building

MCWD's *Balanced Urban Ecology* philosophy recognizes that decisions about land use drive changes in the amount and quality of water that the District is charged with stewarding. However, MCWD has very little control or ownership over the land. Therefore, to carry out its mission most effectively and deliver value to the public, in the form of clean water and healthy natural systems that underpin vibrant communities, the District must work in close partnership with entities whose direct land use control intersects with key District initiatives. These people are decision makers at cities, counties and other units of government, landowners and developers, and residents engaged in the changing landscape of their city. These land use influencers are the most important audiences for the District to reach and engage.

Research and insights from the planning process highlight that, even when maximally successful, broad-based messaging and general awareness do not measurably contribute to the MCWD's ability to carry out its mission and serve its residents. General awareness of MCWD, even among key audiences, does not directly translate into integrated project opportunities, and broad favorable views of the District have not always mitigated conflict on charged issues.

Instead, insights show that the most impactful tactics for achieving meaningful engagement and partnership among key audiences are focused, customized, and context-specific. In particular, the most effective tactics are interpersonal and relationship-based communication: meetings, presentations, phone calls, and tailored written correspondence.

These highest-impact outreach products are delivered by MCWD staff in the course of pursuing their strategic goals: project managers, policy analysts, permitting representatives, researchers, and Board Managers. These "relationship managers" can be thought of as the District's most important outreach channel.

With this clarity the District must realign and optimize its outreach emphasis, away from its current focus on building general brand awareness and affinity through broad-based messaging and diffuse educational programming, to a more focused model that engages prospective partners in a targeted manner with rich and context-specific information that outlines the District's value proposition and advances its key strategic policy and project priorities.

Outreach Alignment Principles

The following overarching principles will guide the realignment of the District's outreach.

1. The District's priority audiences are those that directly control land use planning and decisions that directly intersect with MCWD's strategic priorities, and the people most immediately affected.
   a. Outreach must emphasize the effective engagement of these priority audiences.

2. "Relationship managers," tasked with advancing the strategic priorities of the District, are the most effective channels for engaging priority audiences.
   a. The Outreach program can deliver the most value by guiding, supporting, and evaluating outreach carried out by relationship managers in the course of advancing the District's key strategic initiatives.

3. Focused and targeted, rich, and context-specific outreach of these audiences is most effective.
   a. Outreach programming must directly support the District's relationship managers, through the development of custom-tailored tactical plans or campaigns that fit the unique strategic context of MCWD's key initiatives.

   b. Emphasis of engagement programming must shift away from diffuse engagement of self-selected water volunteers, delivered through annual contracts with non-profit partners, to geographically-focused and custom-tailored engagement of residents most immediately affected by MCWD's priority initiatives.

4. MCWD must focus and balance its finite resources to effectively operate at a challenging nexus within Minnesota's complex water governance framework – where extreme weather is elevating public concern over water conflicts with the built environment, increasing interest in taking local action, and creating a diffuse demand for action that may be outside the District's scope and authority.
   a. Outreach must work closely with the District's Responsive program to continually scan for issues and opportunities, maintaining strategic situational awareness and determining where the District can and should play a leadership or navigator role, before judiciously deploying resources through partnerships to address the emerging needs and interest of communities.

   b. The District must position its website as a hub for useful information that easily connects users to tools, resources and third parties that can supplement services offered by the District.

5. Some baseline broad-based messaging should be maintained.
   a. To complement the focused, deep and tailored outreach supporting MCWD's key initiatives, broad based communications (e.g. mass media) should be delivered to maintain the public's general awareness of MCWD, and favorable perceptions of its mission, and value.

Table 1 below provides a snapshot of the strategic shift in MCWD's outreach programming:

TABLE 1	Before	After
Goal	Build brand awareness and affinity among general public	Directly support the success of the District's key strategic initiatives
Key audience	General public and residents engaged in taking local action on water	Those with direct influence over land use decisions that intersect with the District's key strategic initiatives
Primary product	Stream of general interest content about MCWD accomplishments and residential best practices	Interpersonal communications and custom-tailored campaign content, aligned to support the District's key strategic initiatives
Primary channel	Newsletters, trainings, news media, social media, website, volunteer programs	MCWD relationship managers, and channels that directly align to support their work
Primary focus of program	Create and broadly distribute content	Guide, directly support, and evaluate outreach carried out by relationship managers in the course of advancing the District's key strategic initiatives
Planning approach	Fixed suite of channels and tactics, with content sought to populate those fixed channels	Custom outreach campaigns for key strategic initiatives dictate which tactics are used and in what proportion to support relationship managers as the primary channel
Engagement Programming	Diffuse, self-selected water focused volunteers, through annual contracts with non-profit partners, to promote implementation of local best management practices	Geographically focused engagement of key publics through custom tailored tactics that support the success of MCWD's key strategic initiatives
Website	Broad and deep archive of information without clear audience focus, or content strategy.	Hub of easily navigable tools and services that provide value to the principal users of the website.

Implementation Considerations

To successfully implement the directional shift in the District's outreach, outlined above, a range of tactical elements must be considered. Those include:

1. **Human resources:** The skills, positions and structure of the program
2. **Focus of work:** The priority initiatives the program will align around, execute, or shift
3. **Operations:** The workflow, tools, trainings, evaluation and reporting

Human Resources

The most critical aspect to successfully pivoting MCWD's outreach are the people that will conduct this important work. This will require the District to carefully map the skills that are needed to meet the identified goals for its outreach, and to assemble these skills into a set of positions that can be readily recruited from the marketplace. This work will need to occur first, before refining the work focus or operational details of the program.

Skills

In general, the District's outreach program will require people that are driven, creative, critical thinking leaders, with strategic vision. The outreach team will need to be able to develop a deep understanding of the unique needs of MCWD's priority audiences, and inject effective outreach into MCWD's "business/sales" processes (e.g. project planning, permitting) to create exceptional customer experiences.

The future success of MCWD's outreach will require the ability to use data and contemporary technology to draw deep insights that inform planning and decision making, and develop exceptional written, verbal and visual storytelling. Data regarding the watershed and project/policy benefits will need to be effectively mined, and turned into visually compelling messages, in partnership with monitoring and GIS staff – requiring strong graphic design and data visualization skills.

The team will also need to be able to effectively engage people directly (residents, developers, etc.), requiring planning, process development, interpersonal skills, meeting facilitation, consensus building and community engagement skills.

Positions

These skills will need to be translated into position descriptions before being competitively recruited and filled. These general skill sets are recommended to be broken down into 3 positions that can form a solid foundation for the District's new outreach program. After the program reaches equilibrium, and produces results, the balance of consulting and staffing can be evaluated before scaling up.

Lead/Manager
Maintain situational awareness, strategically advise, develop data driven campaigns for key initiatives
Graphic Design-Web Specialist
Analyze and translate data into visually compelling stories, create tactical content, manage website
Engagement Planner
Plan, develop, implement and support effective face-to-face engagement processes

Focus of work

This shift calls for fundamentally re-understanding the areas of focus for the program's work. Instead of thinking of its work in terms of static channels – newsletters, trainings, social-media posts, contracted engagement – the program now must orient its work toward supporting the success of MCWD's key initiatives.

After staffing decisions are made, action will be required to:

1. Identify and develop key campaigns
2. Transition legacy engagement programming
3. Re-launch website
4. Transition legacy broad-based communications

Identify and develop key campaigns

In order to implement the strategic shift toward custom-tailored support of key initiatives, the program must determine which key initiatives to focus on in a given time period. In some cases, a campaign may be built around a specific capital project, in others a policy or organizational initiative, or in others a broader campaign in a focal geography.

Key initiatives will be chosen and prioritized based on the magnitude of the opportunity or risk posed, their alignment with overall MCWD goals, and the level of outreach need. Campaigns will need to align with annual processes budget and workplanning processes, and the outreach plan for each campaign will need to be presented for consideration as part of the initiative-specific process (e.g. project development, rule revision, etc.).

Examples of potential key initiatives are outlined below for illustration.

1. High water and dam operations
2. MCWD's Realigned Permitting Program
3. Six Mile Creek - Halsted Bay
4. Development and rolling out of MCWD's responsive model
5. 325 Blake Road
6. Minnehaha Creek Parkway visioning in south Minneapolis

Transition legacy engagement programming

Recognizing the triangulated relationship between the public and private land use community, MCWD, and the broader residential public, the District will strategically shift its legacy engagement programming.

The program will move away from annually-renewed contracts that provide broad-based outreach and engagement, toward more geographically focused, targeted and time-defined engagement of residential audiences to meet the unique needs of MCWD's strategic priorities.

To implement this shift thoughtfully and effectively, so that each side of the relationship triangle is maintained and balanced, program staff will take the following steps:

1. Communicate programming shift to external partners

Meet with partners (Metro Blooms, Freshwater, Fortin, and cities) to communicate the District's strategic shift towards more focused services on an as-needed basis. Understanding external partners' long-range plans will identify areas of divergence and synergy between partners, help inform future partnership opportunities, and inform MCWD's plans for thoughtful transition.

2. Improve engagement of existing Master Water Stewards

Create a custom campaign to effectively engage the existing pool of more than 100 stewards within the watershed. Map existing Master Water Stewards within MCWD. Evaluate a range of options to engage existing Master Water Stewards in directly supporting MCWD's priority project and policy objectives. Review these options in coordination with the CAC and Board of Managers in 2020.

3. Indefinitely suspend training of new Master Water Stewards

Pause training new Master Water Stewards and evaluate the potential to engage Freshwater Society on an as-needed and geographically focused basis surrounding the District's priorities. As plans for District initiatives are developed, identify if training new Stewards may provide strategic value in engaging residents in advancing MCWD's priority initiatives. Opportunities that are identified should be carefully evaluated in coordination with the CAC and Board, and advanced on a pilot basis to assess whether to scale, adjust or discontinue.

4. Discontinue consultant contract to support lake associations

Discontinue annually-renewed contract with Freshwater Society related to lake association formation and management. Assess contract and consulting options, including Freshwater's ability and interest, to undertake activities of value on an as-needed basis (e.g. assisting the formation of a new lake association)

5. Utilize the District's responsive program to assess lake association needs and provide a customized level of response based on issues and opportunities raised by associations

Use the responsive program assessment process to intake requests for service and to identify the appropriate role of the District in responding to association needs and to ensure the partnerships, resources and other criteria for a successful initiative are met.

6. Strategically engage lake associations around district projects in their communities

Incorporate the strategic engagement of lake associations into the development of outreach campaigns, in support of MCWD's priority initiatives (e.g. lake associations in Six Mile Creek - Halsted Bay to support capital improvements and next phase planning work)

7. Take a data driven approach to defining MCWD's role in chloride management

Evaluate options for MCWD's strategic position on chloride management for CAC and Board consideration, in context of state and local initiatives, and based on analysis of chloride data in the District.

Re-launch website

MCWD will reposition its website from an archive of information for a broad-based audience, to a hub that connects people to the information they value (e.g. navigating the permitting process, finding information on a water body they care about, accessing tools and third-party programs for installing BMP's or forming resident groups, and information on water levels and recreation).

This will be a major area of work for the newly-staffed program in 2020-2021. The process for developing this high-value hub involves the following steps:

1. Define Outreach program's strategic shift (nearing completion)
2. Plan content strategy (Q1-Q2 2020)
3. Execute contract for design and build (Q3 2020)
4. Design and build (late 2020-early 2021)

Transition legacy broad-based communications

The strategic shift calls for a reduced emphasis on broad-based communications that aren't dictated by a specific campaign. The program must determine to what degree it will continue, suspend, or shift some of its legacy broad-based communications channels, including:

- Social media
- President's and Manager's columns
- Year-Ahead and Mid-Year Highlights newsletters

Operations

As the program is staffed and begins refocusing the work, it must also simultaneously redesign its operations to effectively implement and sustain the change long term in a model of continuous improvement. These operational considerations fall within two broad categories:

1. Workflow
2. Training and tools

Workflow

Workflow will need to be defined and systematized. In general, the series of activities that need to take place to achieve the shift in outreach will include:

1. Intake and Identification of Needs
2. Planning and Executing
3. Evaluation and Reporting

Intake and Identification of Needs

To provide effective outreach support to program staff and relationship managers working on key initiatives, outreach staff will need to develop intake systems and processes to identify emerging organizational needs. Below are examples:

Requests for support
In addition to the tactical plans determined by custom Outreach campaigns, the program will emphasize supporting and evaluating high-impact interpersonal outreach events. To do so effectively and efficiently, the program must be able to consistently and systematically track requests for support, and deploy support in proportion to the strategic importance of the event. The solution should seek to minimize administrative overhead on relationship managers.

- **Key question #1:** How should the program intake requests for support?
- **Example answer:** A custom field in creating a calendar event, which routes an event into a database for tracking, rating, and responding to requests
- **Key question #2:** What criteria are used to determine the Tier of Importance for an outreach event?
- **Example answer:**
  - Tier 1: Critical juncture for significant threat or opportunity
  - Tier 2: Early-stage opportunity or threat
  - Tier 3: Routine touchpoint on something important

Proactive issue scanning
The Outreach program must use its expertise and role as a clearinghouse for customer information to assist MCWD in identifying and responding to emerging issues. Therefore, the program needs to maintain situational awareness, in alignment with the District's Responsive Model, to identify, track, and evaluate potential issues and opportunities.

- **Key question:** How is the program embedded in the Responsive Program to assist in scanning for issues?

Planning and Executing

To effectively balance outreach needs across the organization, processes will need to be developed to effectively integrate outreach planning into the workflow of the District's other business processes, and the routine cycles of annual budgeting and workplanning. New processes will be required to capitalize on the District's data rich environment, by routinely turning data into useful and compelling messages and stories. Below are examples:

Plan Development

Orderly processes will need to be developed to develop short, mid and long term outreach campaigns, that outline objectives, custom tailored tactics, resource needs and timelines for implementation. These plans will need to be integrated into existing planning cycles for key initiatives, and organizational processes such as annual budgeting and workplanning – to allow for work to be effectively forecasted and executed.

Turning data into compelling messages

The strategic shift recognizes that messaging is most effective when it is custom-tailored to the situation and audience. As a science-driven organization, this frequently involves gathering and communicating complex data to create compelling messages. This requires a cross-departmental team, often on short notice, to:

1. Mine information from MCWD's rich data sources and scientific expertise
2. Interpret the data into compelling messages (e.g. examples, metaphors, factoids)
3. Visualize the data to support effective communication

- **Key question:** How do we nimbly respond to needs for turning data into compelling messages?
- **Example answer:** A standing "data messaging" team consisting of member(s) of Outreach, Research and Monitoring, Planning, and GIS

Evaluation and Reporting

The District's realigned outreach program will need to operate in a model of continuous improvement, identifying and adjusting from failures, and scaling success. This will require new processes of evaluation and reporting.

Systemized debriefs

As part of supporting high-impact interpersonal outreach, program staff will lead formal debrief sessions with relationship managers to help process the results, improve future outreach, and collect data on the event. The program must determine how to most effectively use this systemized de-brief. Below are examples.

- **Key question:** What questions do we ask in each debrief?
- **Example answer:**
    - Let's look at the primary goal we laid out. Was this achieved?
    - What messages best resonated?
    - What messages did not land right, or cause conflict?
    - If you were to do it again, what you would do differently?
    - How could we have supported you more effectively?
    - Final: Collect metrics:

Metrics

Historically the program has collected metrics that reflected its primary goal of building general brand awareness and education: e.g., reach, clicks, brand awareness, brand perception. The strategic shift requires new metrics for success.

- **Key question:** What metrics meaningfully measure whether the programming is fulfilling its strategic mission?
- **Example answer:**
    - Breadth and quality of key audience members reached
    - Satisfaction of relationship managers being served
    - Campaign-specific metrics

Tracking

For each metric, the program must have a quantitative measurement. These tracking mechanisms should seek to minimize administrative burden for staff inside and outside the program.

- **Key question:** How can we track the metrics that meaningfully measure outreach success?
- **Example answers:**
    - Breadth of Outreach to key stakeholders: Pull information from Outlook calendars and debriefs to measure quantity and effectiveness of these touchpoints
    - Satisfaction of relationship managers being served: Anonymous survey filled out by relationship manager after each initiative or support event, rating effectiveness of support
    - Campaign specific metrics: Developed uniquely for each campaign

Training and tools

The strategic shift away from broad-based content production toward direct support of key initiatives, with an emphasis on supporting high-impact interpersonal communication, will require a new suite of tools and training.

Presentation best practices

The strategic shift recognizes that the rich, interpersonal outreach conducted by MCWD relationship managers is the organization's most impactful outreach tool. Therefore the program will emphasize guiding, supporting, and evaluating these events, which are frequently delivered as presentations.

This support must be based on an effective presentation framework and philosophy. Program staff will research available programs, identify the best fit, and pursue training and resources within this framework.

- **Key question:** Which presentation framework should the program adopt and seek training in?
- **Example answer:** *Outcome Thinking*

Facilitation framework

Considering interpersonal meetings conducted by MCWD relationship managers as a critical outreach tactic, the program will seek to support these relationship managers by offering skilled facilitation and meeting management. The result will be more effective input gathering and decision making, as well as a reduced burden on relationship managers that allows them to participate more fully.

To best provide this service, Outreach staff must identify a meeting facilitation framework that best suits the District's needs and pursue training and resources within this framework.

- **Key question:** Which meeting facilitation framework should the program adopt and seek training in?
- **Example answer:** World Cafe Method

Information Technology (IT) Needs

Like the rest of the organization, the program will need high-quality data to guide its decisions. The program will need to choose and implement a system for tracking, accessing, and analyzing Outreach data in a way that integrates with the organization's broader IT development.

- **Key question:** What technology solution(s) best address the program's data tracking and analysis needs?
- **Example answer:** Customer Relationship Management (CRM) database that tracks audience data and outreach events across the organization

Consultant support

The program's tactical efforts will be dictated by the custom outreach campaigns it develops around MCWD's key initiatives. Some of these tactics will benefit from auxiliary support from consultants who can augment staff expertise. As the new program begins to mature, it will need to evaluate needs for outside support.

- **Key question:** What types of work should be supported by consultants?
- **Example answers:**
    - Video production
    - Crisis management
    - Interpretive signage development
    - Aerial footage
    - Volunteer training

Cross Departmental Training

The strategic shift calls for the Outreach program embedding more directly into the work of other MCWD programs, instead of operating its own programs.

Successfully implementing this shift will require the outreach team to manage organizational change, effectively communicating required changes in workflow to MCWD staff, Board and CAC.

Conclusion

The strategic shift determined by the Board of Managers, CAC, staff and consultants sets the Outreach Program up to maximally advance the District's ability to deliver value to its stakeholders. With clarity and consensus over the strategic direction, the program is poised to begin putting this shift into action.

To begin implementing the established direction the program must first be staffed with high-caliber professionals whose skills align with the key needs of the program. Once in place, these staff must determine the initiatives it will focus its work around supporting, and shift its approach to legacy activities that no longer support its mission. Finally, these program staff must develop processes, tools, and skills to provide this high-caliber work in a way that best aligns with the organization.