



REQUEST FOR PROPOSAL

FORGING POWERFUL AND SUSTAINABLE RELATIONSHIPS BETWEEN CLEAN WATER AGENCIES AND THE COMMUNITY (RFP 4678)

Objectives

- Develop an understanding of how leading clean water agencies have leveraged evocative messages and community programs that specifically target the development of emotional motivators to form long-term sustainable relationships within a community by connecting customers and partners to tangibly demonstrate the value of water and the technology that creates clean water.
- Provide best practices, lessons learned, and evaluation metrics for utilities to use when developing messages and engagement programs to create emotional connections in alignment with community values.

Budget

Proposals requesting Water Research Foundation (WRF) funding up to \$200,000 will be considered for this effort. Total funds requested from WRF will be taken into consideration in the final proposal selection process. A minimum of \$25,000 must be contributed by the applicant. Acceptable forms of applicant contribution include cost-share, applicant in-kind, or third-party in-kind that meet the Code of Federal Regulation (CFR) requirements in 2 CFR Part 200.306, Cost sharing or matching.

Background

Public education, engagement, and outreach with the community and customers is understood to be a vital practice for water utilities to promote trust, gain public support and acceptance for future utility spending efforts, water stewardship, and increase customer satisfaction. Many strategies have started at the project level providing specific messaging and communication aimed to educate the public on the functions of clean water agencies, infrastructure challenges, need for project specific funding, and current projects that impact customers' everyday lives. It follows that the majority of the guidance and research funded by the Water Research Foundation, Water Environment & Reuse Foundation, WEF, WaterReuse Association, AWWA, and others has also focused on messaging, communications, and developing communications plans for specific projects. While these efforts are important and impactful, there has been limited research on expanding community engagement to connect with community values, emphasize the "why" behind the agency's actions, and communicate the value of the agency's services to the environment, the community, and a sustainable future.

Project and issue specific communication is effective during the life span of the project; however, the connection to the water agencies can dissipate (in some instances) after the project is complete and outreach for that effort is discontinued. The importance of communicating the value of water and the value of the agency's services as part of a holistic engagement strategy has been gaining popularity with organizations that are striving to develop thoughtful and sustainable connections to the community. Although this concept seems intuitive, research on its effectiveness is limited. Additionally, information on specific practices that have been implemented by leaders in this area and how utilities can determine if these practices are working is under represented.

This project aims to incorporate lessons learned from outside the water industry. Relevant research from the private sector was published in the Harvard Business Review in November 2015 titled "The New Science of Customer Emotions" which highlights the returns that companies see when they invest in their customer's emotional connection to a product or service. This article was followed by an article published in the same journal on August 29, 2016 titled "An Emotional Connection Matters More than Customer Satisfaction". Results from these studies demonstrate opportunities to create (and by extension convey) value by using emotional connection as a science and strategy. Additionally, the research reinforced the connection between behavior and "emotional motivators". While these motivators vary for different customer types, communities and demographics, examples of high impact motivators that may be relevant for the clean water community include: protecting the environment, having confidence in the future, and feeling secure. Leveraging an understanding of emotional motivators and fostering emotional connection generated benefits for private industry and may have applicability for utilities that has not been explored.

Anecdotal evidence from the water industry has demonstrated that connecting the citizens to water and nature found in their community environment can create connected customers with an enhanced understanding and of the importance of the agency and the investments made for clean water. Similarly, research from private industry confirms that identifying satisfied customers and transforming them into connected customers leads to an increase in profitability. Although the public sector has fundamental differences when compared to private industry, it is possible that similar strategies can be employed to increase understanding of the value of water and create a cushion of goodwill in a crisis; water stewardship; customer trust; acceptance for new strategies, programs, rates, and bond initiatives; community engagement; and build sustaining relationships with the community at large.

An example of a strategy that incorporates emotional motivators and connection to the community is the philosophy of connecting people to the services the agency provides **and** to the natural and built environment the services protect. Progressive clean water agencies have begun to shift their outreach strategies to develop programs with a goal of connecting the community to the environment. Although connection to the environment may not be the ideal emotional motivator for every community, the approach and strategy to develop programs that leverage community and customer emotional connection will be similar. This project will look at the impact of these programs and outreach strategies to determine if these efforts help to develop long term, sustainable relationships between clean water agencies and the community.

Research Approach

This project pertains to creating long standing relationships between clean water agencies and the community through public involvement/engagement programs that leverage emotional motivators. The successful proposal will describe how the research will evaluate the value of these strategies to

community capacity building, discuss programs that could be or have been used successfully, evaluate ways to measure the success or efficacy of these efforts, and will include case studies of exemplary public education and engagement programs from participating utilities.

A successful proposal will detail a research approach that supports answering the following questions and additional questions deemed important by the research team. Proposals will outline how the team plans to answer these questions and the tasks to be performed.

- What value/benefit is added by creating an emotion connection with customers and the community in an organization's public engagement and/or communications strategy?
- What programs are leading organizations using to develop an emotional connection with customers and the community? Provide an evaluation of these programs including cost, internal (and/or) external staff requirements, etc. and how organizations can assess the resources required to implement these programs.
- How can organizations measure the success or efficacy of these programs?
- How can organizations define customer emotions, connect with these emotions, and link these efforts to results?

The final report should summarize the project results and highlight case studies, best practices and lessons learned from participating utilities. In addition to the final report, alternative communication pieces that enhance and summarize project findings are expected. These can include short duration videos to targeted audiences, strategy bulletins, topic specific summary sheets, info graphics, interactive digital formatting, and electronic tools. Innovative communication pieces are expected to be described in the proposal. Recent projects with various communication pieces include the following:

- <http://www.waterrf.org/Pages/Projects.aspx?PID=4369>
- <http://www.waterrf.org/Pages/Projects.aspx?PID=4093>
- <http://www.waterrf.org/Pages/Projects.aspx?PID=4366>
- <http://www.waterrf.org/Pages/Projects.aspx?PID=4638>

The research team for this project could include professionals with experience working with clean water agencies, sociology, social science research methods, communications and public engagement, behavioral psychology, marketing, and direct response marketing.

References

- Bamberg, Sebastian and Guido Moser. "Twenty years after Hines, Hungerford, and Tomera: A new meta-analysis of psycho-social determinants of pro-environmental behaviour." *Journal of Environmental Psychology* (2007): 14-25.
- Kollmuss, Anja and Julian Agyeman. "Mind the Gap: why do people act environmentally and what are the barriers to pro-environmental behavior?" *Environmental Education Research* (2002): 239-260.
- Magids, Scott, Alan Zorfafas and Daniel Leeman. "The New Science of Customer Emotions." *Harvard Business Review* (2015): 66-76.
- Zorfafas, Alan and Daniel Leeman. *An emotional connection Matters More than Customer Satisfaction*. 29 August 2016. <<https://hbr.org/2016/08/an-emotional-connection-matters-more-than-customer-satisfaction>>.

Proposal Submittal Instructions

Proposals should be submitted to EmOpp@waterrf.org by 3 PM MT on **December 7, 2016**. For proposal submittal questions please contact Caroline Bruck, Senior Administrative Assistant, at cbruck@WaterRF.org (303-347-6118). For technical questions about the RFP, please contact Leanne Miller at lmiller@waterrf.org (303-347-6105).

The Emerging Opportunities Program has unique proposal requirements. Please follow the submission instructions below and do not reference requirements of other research programs. Proposals not adhering to the restrictions below will not be accepted.

Proposals must be submitted in Adobe Acrobat (.pdf) format. The entire proposal, excluding the proposal cover worksheet, resumes, budget form, budget narrative, co-funding support form (when applicable), schedule, and references, should **not exceed 15 pages in length**. Proposals must fit on standard continental U.S. letter sized paper (8 ½ × 11 inches), with minimum margins of one inch on each side of the paper. Text font size must be a minimum of 12 point (12 characters per inch). Proposals must include the following components.

- **Proposal Cover Worksheet** - See the Emerging Opportunity Program Worksheets section at: <http://www.waterrf.org/funding/Pages/proposal-guidelines.aspx>
- **Background and Statement of Need**– Provide a brief summary of the current state of knowledge for the issue that the proposed research will help address, and the drivers for the proposed research. This section should clearly articulate:
 - 1) How this work compares to past or ongoing related research?
 - 2) If the proposed work is duplicative of past research efforts, why this additional work is needed.
- **Objectives** – The proposed research objectives should be clearly identified in one or two sentences.
- **Technical Approach** – Describe how the proposed research will be conducted and the tasks necessary to accomplish the objectives.
- **Benefit to WRF Subscribers** – Identify the practical benefits of the proposed research to utilities and the water community.
- **Research Team and Other Participants** – Identify the key members of the research team and provide brief statements of their qualifications to conduct the proposed research. Identify any other organizations that have committed to collaborate on the proposed research. Curriculum vitae or resumes for research team members are required. Please keep these documents for each member to two pages of data and information relevant to the individual's role on this project and work that is of similar nature to this role.
- **Budget**– A detailed budget is required. The researcher should identify the amount of WRF funds requested and any other cost-share, in-kind, or cash support for the proposed research. The following items will need to be included with the budget. They can be found in the Emerging Opportunities Research Program Worksheets section at <http://www.waterrf.org/funding/Pages/proposal-guidelines.aspx>
 - Budget Form for Proposals
 - Budget Narrative
 - Emerging Opportunities Co-Funding Support Form (when applicable): Each co-funding organization providing cash to the project payable directly to WRF must complete a

separate Emerging Opportunities Co-Funding Support Form and include it with the proposal package.

- **Schedule** - A detailed schedule is required.
- **References** (optional) – detailed citations are not required in the proposal, but may be provided at the discretion of the researcher.

Special proposal requirements for RFP 4678:

1. **Award Administration:** Please note that the award administration (participating utility and PAC responsibilities, project deliverables, and reporting requirements) will follow the requirements in the Section IV of the Focus Area Program Guidelines available at the following link <http://www.waterrf.org/funding/ProposalDocuments/GuidelinesForFocusAreaProgramProposals.pdf>
2. **Research Team and Other Participants:** Please include a brief description (i.e. 1-2 paragraphs) of how the research team will be managed and note person responsible for each task.

Proposal Review and Funding Decision

Proposal review and funding decisions will follow the Emerging Opportunities Program Proposal Guidelines available at the following link:

<http://www.waterrf.org/funding/ProposalDocuments/EOProposalGuidelines.pdf>.

WRF will form a Project Advisory Committee (PAC) composed of volunteer professionals with expertise in the research subject area to oversee the project(s) funded through this solicitation. Proposals will be reviewed by WRF staff and the PAC against established evaluation criteria. WRF may request additional information from the researcher based on this review, and interviews may be conducted for the top two or three proposals as deemed appropriate by WRF and the PAC. Proposals are treated confidentially and will not be shared outside of WRF.

The proposal review and selection process, from initial submittal through final decision, generally will not exceed 6-8 weeks.

UTILITY VOLUNTEERS

The following utilities have indicated an interest in possible participation in this research. This information is updated within 24 business hours when a utility submits a volunteer form and this RFP will be re-posted with the new information. **(Depending upon your settings, you may need to click refresh on your browser to load the latest file.)**

John Lisle

Chief of External Affairs
DC Water
5000 Overlook Avenue, SW
Washington, DC 20032
USA
(202) 787-2616
John.Lisle@dcwater.com

Bishwajeet Pandey

Researcher
Gran Sasso Science Institute
Viale Francesco Crispi, 7
LaQuila, LAQuila 67100
Italy
00393495603771
bishwajeet.pandey@gssi.infn.it

Mark Jockers

Government & Public Affairs Manager
Clean Water Services
2550 SW Hillsboro Hwy
Hillsboro, OR 97123
(503) 681-4450
jockersm@cleanwaterservices.org

Lisa Van Riper

Chief Enterprise Communications
Alexandria Renew
P.O. Box 26428
Alexandria, VA 22313-6428
USA
(703) 549-3381, x2232
Lisa.VanRiper@alexrenew.com

Monica Hoyt

Education & Outreach Director
Central Utah Water Conservancy District
355 West University Parkway
Orem, Utah 84058
USA
(801) 369-9926
monicacuwcd.com