

A large digital screen with a white grid background. The text "Wow. Our Five Year Strategic Plan." is centered on the screen. The word "Wow." is in a bold, black, sans-serif font, and "Our Five Year Strategic Plan." is in a purple, sans-serif font. There are green, orange, and yellow rectangular accents on the grid.

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**“When you’re finished changing, you’re finished.”**  
Benjamin Franklin

# Executive Summary

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This strategic plan serves as a roadmap to achieve CAPIO's goals and objectives. It's a five-year plan with a focus on years one and two. Specific planning five years out is problematic. While broad themes can be identified and worked on, organizational dynamics and change move so fast that predicting the impacts on CAPIO in five years is almost impossible.

Government communicators and public information officials are constantly evolving the profession based on rapid deployment of technology, new communication channels, changing politics and constituent demands.

Therefore, strategies need to be reviewed annually and modified by circumstances, member needs and association objectives.

We applied research and analysis in construction of the strategies and tactics you'll find in this plan. Past CAPIO research was reviewed and analyzed. Stakeholder interviews confirmed key beliefs but also identified new insights that helped us build new strategies and tactics.

In this plan, we focused on membership, education/learning, brand/communications and organization/operations. Since CAPIO is growing and meeting its core objectives, this plan serves as a stepping stone for "what's next" and "what's possible." While at times ambitious, this is a valuable time to review all options and opportunities, and to be proactive in setting a plan for the future.

Successful implementation of this plan is based firmly on resources. The organization has grown through a strong part-time paid executive and the diligent efforts of a relatively small but committed group of volunteer leaders. While this cadre stays in leadership, the organization should experience organic growth and success.

Future success depends on succession planning for volunteer leadership. As noted in this plan, the development of association leadership meets two very key objectives: sustainability of the positive growth curve and allowing more members to engage in leadership development.

With additional resources, CAPIO should be able to expand its member benefits, educational opportunities, expand membership into other compatible areas and ensure proper onboarding of new members to decrease attrition.

Finally, the CAPIO brand needs review. Government communications is a broad professional sector consisting of the legacy membership of government public information officers (PIOs) later evolving to public information officials (PIOs) combined with the numerous personnel and titles who have

involvement in government communications. This can include those who have limited training in communication yet have to engage in communication activities.

This can include everyone from city and special district departmental managers to sworn law enforcement who accept a communications job. The communications mandate in the public sector has resulted in the need for almost everyone in government to have some knowledge or ability in public communications.

This represents a great opportunity for CAPIO to not only increase membership but to support members who become trainers in their organizations.

Consequently, is the CAPIO name and positioning still relevant to what could be a bigger and broader audience of prospective members or nonmembers engaged in CAPIO education programs and activities?

From our analysis of this plan, the CAPIO brand is strong and getting stronger. A name change right now could perhaps disenfranchise the majority of members who have public information and communications as a primary function. A name change should be explored and thoroughly vetted within the membership.

Additionally, the CAPIO name and acronym have become so commonplace that the official name – while used – is not the predominate identity. CAPIO is mentioned as the name of the organization in official and casual use so much more than California Association of Public Information Officials.

In the near term, a more appropriate strategy is to define CAPIO's positioning. This can be a slogan, tagline or general descriptor and should replace what's currently being used. For example, the current tagline – *Because Good Government Requires Good Communicators*, is a true statement but lacks the positioning needed for the future. The word "good" seems too pedestrian for the quality, sophistication, innovation and collaboration that are cornerstones to CAPIO's current brand identity. We recommend the CAPIO Branding Committee develop a positioning and descriptors that make CAPIO relevant to its current membership and others in government who would benefit from membership and/or educational and networking opportunities.

Those prospective audience segments are noted in this plan.

# 1

## OVERVIEW

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The California Association of Public Information Officials (CAPIO) has had a long and respected history serving California’s government public relations professionals, which today can include government public information officers, public information officials, government communicators and others with various titles, but have been given responsibilities or assignments in the communications sphere.

The changing roles require CAPIO to be responsible to changing needs of members, nonmembers and the profession to remain relevant, responsive and growing. The purpose of this five-year plan is to outline and define specific strategies and action items to improve CAPIO, the CAPIO experience and meet the basic mission of the organization.

The plan consisted of research and planning including conference calls with CAPIO leadership, stakeholder interviews with “informed sources,” essentially those with interesting perspectives and insights of the organizations and the profession, and online surveys of members and nonmembers.

This information was compiled into a fact base and used as the basis for a facilitated strategic planning discussion with the board over a two-day retreat. The result was immediate action steps and other key considerations for future years based on resources and additional board discussions.

CAPIO’s success in recent years is a direct result of the board and leadership focusing on a better CAPIO experience for members and nonmembers including a more robust, educational and fun conference, expanded regional workshop opportunities and webinars, focused membership efforts with partnerships with other organizations and targeted communications. The results have been extraordinary, with membership tripling in the last five years including substantial growth in 2017. CAPIO had 435 members in March of 2017, growing to 525 members in July, 2017. Membership numbers are expected to ebb and flow based on renewals.

Additionally, CAPIO’s social media likes have increased, as well as conference and workshop attendance. Now, the board is asking... What’s next? What can CAPIO do over the next five years to further its mission?

# 2

## RESEARCH HIGHLIGHTS

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The research conducted by Crocker & Crocker in preparation for strategic planning provided some valuable insights. Some are reiterate findings from previous surveys, but some are new insights that help CAPIO set the stage for growth and an improved member experience for the next five years. Specific research findings can be found in the Addendums of this plan. A summary is provided here.

## **Member Survey Highlights**

- Most valuable benefit:
  - Annual conference and conference workshops \*
  - Connection to peers in my region and California
  - Regional workshops / PIO Institute
- Primary function:
  - Teach best practices and new trends in communications
  - Respondents like the socialization from in-person events
- How do you learn best:
  - Live presentation and workshops
  - Webinars and computer-based learning
  - Desire for more educational webinars

## **Member Survey Highlights**

- Participation:
  - Annual conference and conference workshops\*
  - Educational webinars
  - Access information on CAPIO's website
- Travel to events:
  - Up to 60 miles
  - Depends on the topic; depends on travel time, not miles
- Why they haven't joined:
  - Cost and employer won't pay
  - May attend conference or enter awards at nonmember rate

## **Stakeholder Highlights**

- Core strength is its focus on government communications
- Connection point for sharing information and learning
- CAPIO members often belong to other organizations
- More regional (or even local) education/networking events needed
- PIOs need to share learning with others at their organization
- PIOs still need to educate others in their organization about the importance of their job and communications
- CAPIO is on the right track but can improve amount and value of its communications, build affinity groups and remote access to educational opportunities

### **Fact Base**

- Satisfaction strong for in-person conferences/workshops
- Value in socialization/networking from in-person events but...
- Desire for more educational webinars; more regional events
- Overall, strong value versus price for membership dues
- Members still want diversity in education and training
- Geography is a factor for conference attendance
- Members who can't attend the conference may see little value
- Lack of findings from recent members (will they stay)
- CAPIO "competes" with PRSA and other organizations
- CAPIO's niche is government communications

### **CAPIO Core Strengths**

- CAPIO's unique with its greatest strength and benefit is a focus on government communications
- CAPIO is a connection point for learning
- CAPIO has a niche and excels by staying focused and "staying in its lane"
- CAPIO members receive strong value for the price of dues/fees

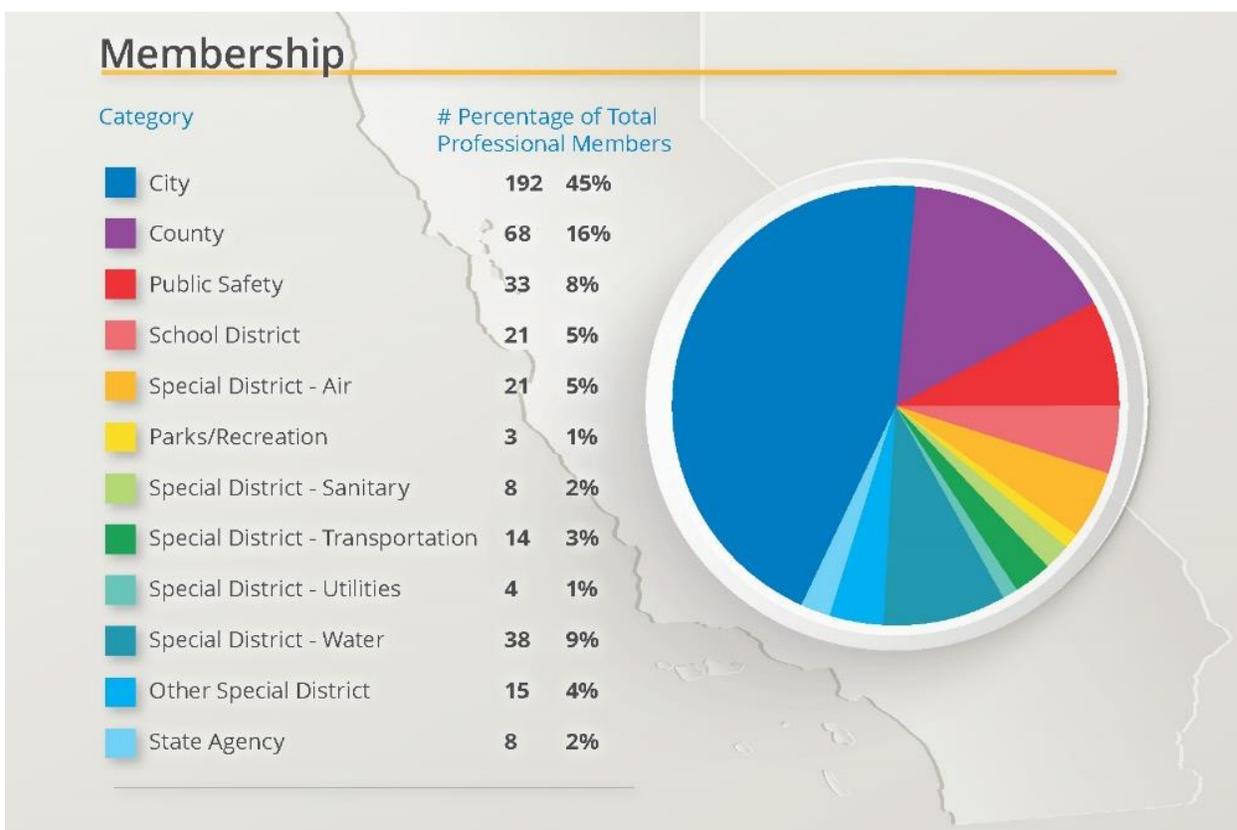
# 3

## Membership

### Solid Growth, Where does CAPIO go from here?

CAPIO continues to grow at a rapid pace. The chart below (one year old) represents the diversity of the organization's membership base. Its core segment is with municipalities, school districts and special districts. However, the organization has yet to tap the potential of the total number of government communicators, and those with communications related assignments.

The core membership benefits of CAPIO, as they are currently configured, would be attractive to all government communicators in California. However, some of the specialty type of agencies may be seeking more specific educational and networking opportunities.



## Year One Strategies

- 10% increase in year one
- Survey non-renewing members and find out why
- Connect a board or existing member with a new member to help the new member engage in a productive way, understand member benefits and connect with other members
- Host a new member networking session at the conference
- Analyze strategies to focus on targeted audience segments
  - Conference affinity focus groups (select two or three)
  - Enter into early dialogue about further collaboration with SiOC

## Year Two Strategies

- 10% increase in year one
- Target audience segments and test affinity groups within CAPIO
  - Public safety
  - Special districts – open for growth
  - State agency PIOs and communicators
  - Change CAPIO positioning and wording for specific audience segments
- Re-structure member-only benefits to demonstrate even more value; examples include:
  - Advanced training track
  - Full-day symposium
  - PIO tool kit
  - Live streaming events and workshops
  - Mentoring/career development

## Years Three to Five Strategies

- 10% increase in each year
- Add more affiliate members and develop member benefits
  - Digital marketing
  - Research vendors
  - PR agencies
  - Production resources
- Consider expanding membership outside of California to other western states
- Evaluate group discounts for multiple members per agency

# EDUCATION AND LEARNING

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## **Building on CAPIO's strength: Education and Learning**

Education, learning and training are key benefits to CAPIO membership. The annual conference, workshops and webinars are growing. The PIO Institute and APR certifications position CAPIO as the go-to association for government communicators. CAPIO should leverage technology, meet the training needs a diverse membership from first-time professionals and seasoned pros to specific affinity groups and other member segments.

### **Year One Strategies**

- Grow attendance at conference with a focus on curriculum and learning opportunities
- Grow attendance and number of regional workshops and webinars based on research
- Test more localized networking/information sharing luncheons or breakfasts

### **Year Two Strategies**

- Develop career development learning events for members
- Expand conference, regional and local workshops with special tracks
  - Affinity group tracks such as public safety
  - New PIO track
  - Advanced learning tracks
  - Sector tracks (water, energy, elected, public works, wastewater, sanitation)
- Test video training and creation of a video training archive on the web
- Add more leadership opportunities in CAPIO for members as a learning opportunity

### **Years Three to Five Strategies**

- Develop member profiles on website focused on subject matter expertise
- Develop college programs to promote CAPIO and careers in government communications
- Develop toolkit for PIOs to educate others in their agency about communications
- Explore mobile apps for mobile access to learning and resources
- Revisit and make necessary adjustments to PIO Institute curriculum

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# COMMUNICATIONS AND BRANDING

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## **Positioning CAPIO for the future**

As CAPIO's five-year strategic plan unfolds, it's important to evaluate all aspects of the association's brand and marketing. Overall, CAPIO has done an exceptional job with its communications as quantified growth in membership, conference attendance, number of award submissions and increase in social media engagement. However, the core aspects of CAPIO's brand may evolve with changes in government communication professional titling, outreach new membership segments and other strategic initiatives. Marketing and communications will evolve based on new media and digital communications, outreach to new audiences and finding new ways to engage members.

## **Attributes of CAPIO**

- Inspiring
- Fierce
- Dynamic
- Energetic
- Trustworthy
- Cutting edge
- Powerful
- Collaborative
- Scholarly
- Engaging

## **Year One Strategies**

- Develop committee to review brand and brand platform
  - Evaluate CAPIO name and determine if a name change is needed since many members and those in the profession do not use the title, Public Information Officer or Public Information Official.
  - Evaluate slogan and determine if the slogan is still relevant: "Because Good Government Requires Good Communicators."
  - Evaluate CAPIO positioning. One recommendation from retreat: CAPIO is the premier organization for communicators in government and the go-to organization for public sector entities, media and educators about government communications and transparency
- Reposition newsletter with more informational/ how-to information – not just member news
- Evaluate CAPIO website and develop new architecture
  - Do needs analysis
  - Develop architecture
  - Identify functionality changes
- Review CAPIO promotional materials
  - Membership brochure
  - Develop promotional videos

## **Year Two Strategies**

- Build Speaker's Bureau for outreach and advocacy to key audiences
  - Media
  - Elected Officials
  - Executive level management at cities, special districts and agencies
  - Educators
  - Develop speakers presentation
- Implement new website
  - Based on architecture and branding developed in Year One

## **Years Three to Five Strategies**

- Work on member discussion board
  - Closed LinkedIn group?
  - CAPIO website?

# 6

## ORGANIZATION & OPERATIONS

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### Structuring CAPIO to meet growing opportunities

As part of its strategic planning, the CAPIO organization must evolve to accommodate current and growing member needs and an organizational infrastructure to keep pace. The development of a five-year strategic plan is the first piece of the puzzle. The plan is a living document and must be managed, evaluated and revised as needed. Other organizational changes are also needed to ensure the strategic plan remains proactive.

### Year One Strategies

- Develop chapter groups
  - Select a few major geographic concentrations within the regions
  - Begin with informal networking or learning events
  - Determine if this chapter events are exclusive to members
  - Make events attractive to millennial members and potential members
- Support regional directors with localized CAPIO ambassadors
  - Provides opportunity for leadership development and board succession
  - Better local connectivity for member recruitment and events
  - Another source of data and input about member satisfaction
  - Board elections start earlier – help give them a transition time..... Transition would still be after the April conference.

### Year Two Strategies

- Evaluate success and revisions for five-year strategic plan
- Select additional chapter areas to cultivate
- Evaluate necessity for more paid-staff time and/or personnel
- Survey members and leadership to benchmark implementation of strategic plan
  - Gauge satisfaction with conference, webinars and regional events, connection to resources and overall value of membership
- Develop plan for financial stability in a changing marketplace and economy
- Consider expanding 18-month activity calendar to 24 months
- Expand partnerships and alliance with similar organizations

### **Years Three to Five Strategies**

- Formally transition from regions to chapters if growth continues
- Yearly evaluation of CAPIO's strategic plan
- Yearly review of paid management needs relative to paid management contract
- Consider formalizing alliances with similar organizations through mergers
- Be a statewide advocate/leader for government transparency and communications

# 8

## SUCCESS TRACKING & EVALUATION METRICS

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### Reach and Engagement

- Track number of register members
- Track non-member in database; and gauge size of market
- Quantify sponsor contributions
- Track specific website activity
- Track conference and event/webinar attendance
- Track numbers reached through social media
- Track numbers reached through media relations
- Track number of speaking engagements and audience size
- Monitor and measure analytics for the website, e-blasts and social media platforms

### Awareness, Perception and Satisfaction

- Year One Strategies
  - Conduct online survey of stakeholders, sponsors, members and nonmembers
  - Host new member event at conference and ask for input
  - Survey all conference and workshop attendees
  - Conduct exit survey of members who drop out
  - Survey board and other leadership on success of strategic plan implementation



California Association of  
Public Information Officials  
*Good Government. Good Communicators.*

## CAPIO Strategic Plan

Prepared By Crocker & Crocker



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