

Study Guide

for the Principles for Accreditation in Public Relations

Beta Examination

A Preparation Tool for BETA Candidates

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Functioning as part of the Public Relations Society of America

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Introduction

Thank for being a beta tester for the Principles for Accreditation in Public Relations Beta process. We're sure that you will find it a fascinating and rewarding experience. At the same time, you will be providing an invaluable service to your colleagues and the many generations of public relations practitioners who will benefit from Principles for Accreditation in Public Relations.

The Principles for Accreditation in Public Relations (P-APR) program will provide a national certification in public relations for entry level professionals and provide a differentiator for new public relations professionals entering the work force. Successful completion of the examination will require a significant degree of knowledge of public relations principles and ethics. Successful candidate will use P-APR credential after their name.

About Beta Testing

The beta test of the re-engineered examination is one of the *final* steps in a development process that has involved scores of volunteers, thousands of hours, four world-class research, consulting and test development firms, more than a quarter million dollars and three years of focused work. Your participation in the beta test is near the end of a rigorous, scientific process that has been grounded in state-of-the-art best practices in professional certification testing.

If you are familiar with the introduction of new software programs, then you have a good sense of what a beta test is all about. As we've said, you will be involved near the *end* of the process. You will be working with a *very* highly refined product; you will not be "a guinea pig" in an untested environment. In fact, by the time a question is ready for beta testing, it has been through rigorous development, sourcing and pre-testing. Each question you will encounter was authored originally by a subject matter expert who was trained by a test development firm to write test questions, tied to a reference source in the public relations body of knowledge, reviewed by another peer and then revised by the author. Each question was then edited for readability and clarity by a professional test editor, reviewed by a professional psychometrician and reviewed, revised – or rejected – by a national panel of experts that included many of the leading authors, academicians and practitioners in our industry.

How You Were Selected

Your selection as a beta tester is also part of the process. You volunteered! (Thanks!) We want you to know *exactly* what you have agreed to do. Two different "populations" will be contributing to the beta test: already-Accredited practitioners and actual candidates for Principles for Accreditation in Public Relations. Those who are candidates will be granted P-APR designation if they successfully complete the beta test.

For all groups, you will be taking an examination that may last 2 hours and is significantly longer than the final examination will be; the final release examination will take about 1 – 1.5 hours to complete.

Take It Seriously

We want you to have this information both to give you confidence in the process that has led to your participation and to demonstrate that we have taken this process very, very seriously. We ask that you do the

same. In the package of materials you will receive confirming your acceptance as a beta tester, you also will receive a confidentiality agreement that must be signed prior to your admission to one of the more than 300 Prometric testing centers around the country where the examination ultimately will be delivered.

Prepare to Succeed

We recommend – to *all* beta testers – that you prepare yourself earnestly and adequately to be *successful* in the beta test. You will not be comfortable nor will you forward the process if you approach the beta test lightly, “off the cuff” or without adequate preparation.

We’ve written this to help you prepare for the beta test. Since the examination is designed to test your knowledge of the principles of public relations practice, you’ll be more comfortable and at ease if you have “done your homework.”

What’s in the Beta Examination

The beta examination is organized and tests eight groupings of “Knowledge, Skills & Abilities” (KSAs). The chart below indicates the percentage of the beta examination that is devoted to each of these categories. For detailed descriptions of the sub-sets of each KSA grouping that will be tested, click the link below.

KSA Group	% of the examination
History and current issues in public relations	6%
Business literacy	10%
Ethics and Law	12%
Communication Models and Theories	15%
Researching, Planning, Implementing & Evaluating Programs	25%
Crisis Communication Management	5%
Using Information Technology Efficiently	12%
Media Relations	15%

Your results

If you are an actual candidate for Principles for Accreditation in Public Relations, you will be notified of your pass or fail status. Already-Accredited practitioners will not be notified. A statistical analysis of the examination and results will take place first to determine the valid passing score. If an actual candidate achieves the "passing score," the Universal Accreditation Board will grant Accreditation to that individual.

Again, thank you. Questions for this examination have been carefully developed by competent professionals and testing experts. A field test is essential. You have helped to accomplish this. The Universal Accreditation Board is extremely grateful for your participation.

Questions, Concerns, schedule problems?

Answers to Frequently Asked Questions about the Beta Examination for Accreditation in Public Relations are available at www.praccreditation.org.

If, after you have scheduled your appointment with Prometric, you find that you are unable to participate in the Beta Examination, you may reschedule your appointment **if you do so a minimum of two full business days prior to your initially scheduled appointment**. You may *not* reschedule via the web and must do so by calling 1-800-853-6775. You will be asked for your confirmation number so be sure to have it available.

Since you, specifically, have been selected as a Beta Examination participant to assure the proper balance of skill levels required to test the examination questions, please remember that **your** participation is vital. We are counting on you.

If you are a candidate for Accreditation, the reduced fee you already have paid as a Beta Examination participant will not be refunded if you fail to complete the Beta Examination for any reason. Your fee may not be transferred to any other testing cycle or to any other person.

If you have questions or concerns about your participation as a Beta Examination participant, please contact Kathy Mulvihill, manager of the Accreditation Program. You will also find answers to frequently asked questions (FAQs) on the Universal Accreditation Board site at www.praccreditation.org.

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Readings

The UAB suggests that candidates for Accreditation review selected contents of at least one general text from the Short Bookshelf of Texts Recommended for preparation and one or more of the specialized texts that provide in-depth material on competency-related subjects. Following are suggested chapters that correspond to the sections of this study guide and to the knowledge, skills and abilities (KSAs) tested. Please note that some chapters address several areas of KSAs. In some sections of this study guide, you will also find resources not on the UAB bookshelves to encourage you to explore these areas of KSAs further.

(AP Stylebook 2010)

Christian, D., Jacobsen, S., & Minthorn, D. (2010). *The Associated Press Stylebook and Briefing on Media Law* (45th ed.). New York: The Associated Press.

(EPR 10th)

Broom, G. M. (2009). *Cutlip and Center's effective public relations* (10th ed.). Upper Saddle River, NJ: Pearson Prentice Hall.

(Primer of PR)

Stacks, D. W. (2002). *Primer of public relations research*. New York: Guilford Press.

(Strategies and Tactics 9th)

Wilcox, D. L., & Cameron, G. T. (2005). *Public relations: Strategies and tactics* (9th ed.). Boston: Allyn & Bacon.

(Strategic Planning 3rd)

Smith, R. D. (2009). *Strategic planning for public relations* (3rd ed.). Mahwah, NJ: Lawrence Erlbaum.

Definitions of Public Relations (Practice, Function, Roles)

- EPR 10th, chapters 1 and 2
- Primer of PR, chapter 2
- Strategies and Tactics, chapters 1 and 2

Ethics and Law

- AP Style 2010, Briefing on Media Law section
- EPR 10th, chapters 5 and 6
- Primer of PR, chapter 3
- Strategies and Tactics, chapters 3, 9 (The Ethics of Persuasion) and 12

Communication Models and Theories

- EPR 10th, chapters 7, 8, 12
- Strategies and Tactics, chapters 7, 9 and 11
- Strategic Planning, Step 6: Using Effective Communication.

Research, Planning, Implementation and Evaluation

- EPR 10th, chapters 11, 12, 13 and 14
- Primer of PR, Part II: Informal Research Methodology; Part III: Formal Research Methodology
- Strategies and Tactics, chapters 5, 6, 7 and 8
- Strategic Planning, all content, a step-by-step planning process for public relations professionals

Crisis Communication Management

- EPR 10th, chapters 11 (Defining Public Relations Problems), 12 (Anticipating Disasters and Crises, Establishing an Information Center) and 13
- Strategies and Tactics, chapter 10

Business Literacy

- AP Style 2010, Business Guidelines section
- EPR 10th, chapters 6 (Financial Public Relations, Securities Trading and Fraud) and 15 (Corporate Financial Relations)
- Strategies and Tactics, chapters 12 (Regulations by Government Agencies, Liability for Sponsored Events, Working with Lawyers), 14 (Annual Reports) and 17 (Investor Relations)
- AP Style 2010, Sports Guidelines and Style, Business Guidelines, and Guide to Punctuation sections
- EPR 10th, chapter 10 and 16 (Facilitating Media Relations)
- Strategies and Tactics, chapters 3 (Ethical Dealings with News Media), 11, 13, 14, 15 and 16
- Strategic Planning, Step 6: Using Effective Communication; Step 7: Choosing Communication Tactics

Using Information Technology Efficiently

- EPR 10th, chapters 4 (Digital Age and Globalization), 6 (The Internet) and 10 (New Media, New Challenges)
- Primer of PR, chapter 10 (Design Considerations, Survey Type: Internet)
- Strategies and Tactics, chapters 2 (Other Major Trends) 11, 13 and 15

History of and Current Issues in Public Relations

- EPR 10th, chapters 1, 4 and 7
- Strategies and Tactics, chapter 2

Tips and What to Expect

Tips for Preparation

1. Familiarize yourself with the competencies or **knowledge, skills and abilities (KSAs)**. These KSAs are your outline of what is tested on the Principles for Accreditation in Public Relations Beta Examination.
2. Pay attention to the percentage listed with each KSA. For example, researching, planning, implementing and evaluating programs accounts for 25 percent of the Examination while history is six percent. So 25 percent of the questions relate to research, planning, implementing and/or evaluating, but only six percent involve history. Use the KSAs and these percentages to guide your preparation.
3. Note that many of the questions on the Principles for Accreditation in Public Relations Beta Examination are posed as brief situations or scenarios and only limited background is provided. All questions are multiple-choice.
4. Refer to the Short Bookshelf of Recommended Texts and use the information provided, linked from the [Readings](#) page in this study guide.
5. Review the PRSA Code of Ethics, and use the exercises and case studies in this study guide and on PRSA's code of ethics page, easily accessed via link from the [Readings](#) page.
6. If you have questions, ask your PRSSA professional advisor. You may also contact Kathy Mulvihill (kathy.mulvihill@prsa.org), Accreditation program manager at PRSA, for guidance to others who can assist you.

What to Expect at the Prometric Testing Center

Examination Length

You will have two hours to complete the Principles for Accreditation in Public Relations Beta Examination, including 15 minutes of recommended practice/tutorial time before you start the test. Use all the time allotted to make certain you are answering all questions posed.

Examination Questions

There are about 100 questions on the Principles for Accreditation in Public Relations Beta Examination. You will be responding to the full bank of questions for what will become the new Principles for Accreditation in Public Relations Examination. Therefore, you are being given approximately twice the time that future candidates will be allowed for this portion.

The question order is random, changing from candidate to candidate, testing site to testing site. Many questions are presented as brief scenarios, and all are weighted in proportion to the percentages listed with the KSAs. In other words, more questions focus on Ethics and Law (12 percent) than on Crisis Communication Management (5 percent).

Admission to the Examination Area

Arrive at the Prometric Testing Center at least 30 minutes before your scheduled examination time. If you arrive 30 minutes or more after your scheduled examination time, you will be considered a non-refundable no-show. Be prepared to show two current forms of identification with your signature, including one valid government-issued photo identification document, such as a driver's license or passport, and a second identification document that has your signature. Your name on both identification documents must match the name on the Authorization to Test (ATT) letter you received from our UAB Accreditation Manager. You cannot take the test without the required identification. Some Prometric sites also now give you the option of providing biometric identification in the form of an electronic fingerprint that will be deleted as soon as you complete the test. The purpose is to speed your exit and re-entry if you take a break.

Missed Appointment

Your fee cannot be refunded if you miss your appointment or do not have proper identification.

Dress

Wear comfortable, layered clothing. Test center temperatures may vary; and because there are many locations all over the country, there may be other physical differences.

Taking the Examination

Upon check-in, you will be required to leave all personal items in a locker. You can't take anything in or out of the actual testing area. You will be given scratch paper and pencil or an erasable board and marker for use during the Examination. Prometric will collect these items from you when you finish. While you're taking the test, you can make notes, write down things you don't want to forget, and list questions you've answered but want to double-check later if there's time. These questions may be in addition to those that you flag electronically to return to later.

Prometric meets testing needs for numerous organizations nationwide. Others in the room when you take the Examination for Accreditation in Public Relations are probably not taking the APR test. Expect to be in a room filled with computer stations and other people at work. If the Prometric manager hands you a calculator when you check in, say no thank you and hand it back because you don't need it.

All Prometric sites employ continuous video surveillance technology for security purposes. The footage can be reviewed in cases where a security breach or candidate misconduct may be a concern.

Tips for Taking a Computer-Based Examination

1. The only computer skill you need to take this test is the ability to move a computer mouse (pointing device) and click on a box. Or, you can take the test by using keyboard commands if you prefer.
2. The computer-based Examination is multiple-choice, just like tests you have taken with pencil and paper.
3. You do not have to select a final answer for every question as you come to it. The computer will let you electronically flag those that you want to return to later.
4. Many questions require two and as many as three answers. Questions with multiple answers will clearly state how many you need to select. Read carefully and remember that there are no trick questions.
5. The computer will not let you move on to the next one until you have selected the appropriate number of responses.
6. There is no credit for partial correctness in this examination. If two responses are called for and you check one that is correct and one that is not, the question will be scored as 100% incorrect.
7. Don't fight the question. This is not the time to mentally disagree with either the question or the possible answers. This kind of internal conflict will only use up valuable time and energy. Recognize that these questions were developed by professionals and are based on a valid body of knowledge.
8. You will take a step-by-step tutorial before starting the Examination that will show you how to use the computer and answer the questions. Relax and take your time becoming comfortable with the computer. The tutorial generally takes about 15 minutes, which is included in the time you have to complete the Examination.
9. The tutorial will also teach you how to navigate through the Examination, including how to flag questions to return to later.
10. Throughout the Examination, the computer screen will display how much time you have left so that you can pace yourself. When your time is up, the screen will display a message telling you that the Examination is over. If you finish earlier, you can leave.

Public Relations: A Management Function

What is Public Relations

“Public relations is the management function that establishes and maintains mutually beneficial relationships between an organization and the publics on whom its success or failure depends.” (Broom, 2009, EPR, p. 7).

How Does Public Relations Earn Public Understanding and Acceptance?

Public relations forms, builds and maintains relationships between your organization and publics by finding common interests. Failures usually stem from communication breakdowns.

What is the Social Significance of the Practice of Public Relations?

American business gave birth to public relations as it is practiced today. Growth and trends in business created the conditions for the public relations profession to develop.

Typical 12 Functions of Public Relations

Competencies

1. Trusted counsel—advise and anticipate
2. Internal communication—engage employees and build trust
3. Media relations—develop public trust and support
4. Community relations—establish public trust and support
5. External communication to customers/stakeholders/investors, etc.—build public trust and support

Public Relations Four-Step Process

6. Research and strategize
7. Plan
8. Implement, execute and communicate
9. Evaluate

Other

10. Publicity and special events
11. Issues management
12. Crisis communication

Definitions

Advertising: Information placed in the media by an identified sponsor that pays for time or space. It is a controlled method of placing messages in the media.

Brand: A product, service or concept that is publicly distinguished from other products, services or concepts so that it can be easily communicated and usually marketed. A brand name is the name of the distinctive product, service or concept.

Branding: The process of creating and/or disseminating the brand name. Branding can be applied to the entire corporate identity as well as to individual product and service names.

Community relations: An area of public relations with responsibilities for building relationships with constituent publics such as schools, charities, clubs and activist interests of the neighborhoods or metropolitan areas(s) where an organization operates. Dealing and communicating with citizens and groups within an organization's operating area.

Controlled communication channels: Self-sponsored communication channels, media and tools that are under direct control of the sender. Examples include paid advertising, newsletters, brochures, some types of e-mails, organizational websites and blogs, leaflets, organizational broadcasts and podcasts, intranets, teleconferences and videoconferences, meetings, speeches, position papers, and all other channels and communication products under organizational control.

Counseling: Advising management concerning policies, relations and communications.

Crisis communication: Protects and defends an individual, company or organization facing a public challenge to its reputation. These challenges can involve legal, ethical or financial standing. See Crisis Communication Management in this study guide.

Employee relations: Activities designed to build sound relationships between an organization and its employees, and a critical element in fostering positive attitudes and behavior of employees as ambassadors for the organization.

Financial relations: An aspect of public relations responsible for building relationships with investor publics, including shareholders/stockholders, potential investors, financial analysts, the financial markets (such as the stock exchanges and commodities exchanges), and the Securities and Exchange Commission. Dealing and communicating with the shareholders of an organization and the investment community. Also known as investor relations or shareholder relations.

Government relations: An aspect of relationship-building between an organization and government at local, state, and/or national levels, especially involving flow of information to and from legislative and regulatory bodies in an effort to influence public policy decisions compatible with the organization's interests. Dealing and communicating with legislatures and government agencies on behalf of an organization. Also see Public Affairs and Lobbying.

Grassroots organizing: An activist practice for creating social change among average people. Grassroots organizing is based on the power of the people to take collective action on their own behalf. This public relations technique is often used to sway public opinion and move legislators to action. Grassroots uses the same strategy, but with community influencers.

Issues management: The proactive process of anticipating, identifying, evaluating and responding to public policy issues that affect organizations and their publics now and in the future.

Lobbying: The specialized area of public relations that builds and maintains relations with a government or its officials for the primary purpose of influencing legislation and regulation. Also see Government Relations and Public Affairs.

Marketing: The management function that identifies human needs and wants, offers products and services to satisfy those demands, and causes transactions that deliver products and services in exchange for something of value to the provider. Targets customers.

Marketing communications: A combination of activities designed to sell a product, service or idea, including advertising, collateral materials, interactive communications, publicity, promotion, direct mail, trade shows and special events.

Media relations: Mutually beneficial associations between publicists or public relations professionals and members of media organizations as a condition for reaching audiences with messages of news or features of interest. Maintaining up-to-date lists of media people and a knowledge of media audience interests are critical to the function. Dealing with communication media in seeking publicity or responding to their interest in the organization.

Multicultural relations/workplace diversity: Relating with people in various cultural groups. Understanding multicultural and workplace diversity continues to increase in importance. Diversity in the workplace continues to provide challenges and opportunities to public relations practitioners and other managers impacting messaging, perceptions of ideas, and services. These considerations may include issues of household composition, ages, gender, ethnic and religious backgrounds, language, technology fluency, health status or disabilities.

Press agency: Creating newsworthy stories and events to attract media attention and gain public notice.

Proactive public relations: Taking the initiative to develop and apply public relations plans to achieve measurable results toward set goals and objectives. Also see Reactive Public Relations.

Promotion: Activities designed to win publicity or attention, especially the staging of special events to generate media coverage. Special activities designed to create and stimulate interest in a person, product, organization or cause.

Propaganda: Persuasion based on appeals rather than on the merits of a case. Often gives only one side of an argument, making it deceitful and not in the public interest.

Propaganda devices:

- Glittering generalities (broad statements)
- Name calling (emotions)
- Transfer (guilt by association)
- Bandwagon (everybody's doing it)
- Plain folks (anti-elitism)
- Testimonials (if irrelevant)
- Card stacking (one-sided)

Public affairs: A specialized area of public relations that builds and maintains mutually beneficial governmental and local community relations. Also applies to the military and governmental agencies due to the 1913 Gillett Amendment. Also see Lobbying and Government Relations.

Public information: Representation of a point of view in collected forms such as facts, news, messages, pictures or data; the process of disseminating such information to publics usually through the mass media; a designation describing persons charged with the task of such dissemination usually on behalf of government agencies, nonprofit organizations, colleges or universities.

Publicity: Information from an outside source that is used by the media because it has news value. It is an uncontrolled method of placing messages because the source does not pay the media for placement.

Reactive public relations: Response to crises and putting out fires defensively rather than initiating programs. There are varying degrees of reactive public relations with some situations requiring implementation of an organization's crisis plan. Also see Proactive Public Relations.

Reputation Management: Reputation management has long been a function of public relations, which is often cited in the context of crisis management. The increased use of the Internet and related social media has given added urgency to the practice, as the immediate and anonymous nature of the Web increases the risk of communications that can damage an organization's reputation. Online reputation management is a growing specialized segment of public relations.

Special events: Stimulating an interest in a person, product or organization by means of a focused "happening." Activities designed to interact with publics and listen to them.

Uncontrolled communications channels: Uncontrolled communications channels refer to the media that are not under direct control of the company, organization or sender of messages. These include newspapers and magazines, radio and television, external websites, externally produced blogs and social media commentary, and externally produced news stories.

Ethics and Law

Ethics and Law questions account for 12 percent of the computer-based Examination.

Ethics

The application of ethics to the practice of public relations is critical to our profession. Common ethical principles of public relations practice and a decision-making model designed to help you evaluate an ethical dilemma and form the rationale to support it follow. Several scenarios are also provided for you to use to practice ethical decision-making.

Common Ethical Principles of Public Relations Practice

Each [Participating Organization](#) that is a member of the UAB has its own code of ethics, and all share some common principles. For purposes of this Examination, familiarity with the following common ethical principles is recommended, along with knowledge of the code of ethics for the Participating Organization in which you are a member.

General Principles Underlying Public Relations Practice

- Act in the public interest.
 - Find the greater good for the majority of the people.
- Use honesty and integrity as your guide.
- Ensure accuracy and truth.
 - Do not disseminate false and misleading information.
 - If you accidentally do make an error, correct it immediately with all audiences.
- Deal fairly with all publics.
 - Respect yourself and respect others.
 - When you move to a new position, leave proprietary materials related to your old job behind.

More Specific Principles Defining How Public Relations is Practiced

- Accurately define what public relations strategies and tactics can accomplish.
 - Do not guarantee results for areas beyond your control.
- Maintain the integrity of communication channels.
 - Ensure transparency with all audiences, from employees to external publics.
 - Maintain ethical relationships with government, regulatory agencies, media, colleagues and all audiences.
- Safeguard confidences.

- Build trust through protection of confidential information.
- Secure the privacy of organization and individuals.
- Do not damage the reputation of others.
 - Be careful during agency pitches.
 - Stick to the facts and avoid the gossip.
- Avoid conflicts of interest.
 - Disclose interests of yourself and others.
 - Get consent to represent conflicting views or competitors; maintain the related knowledge in two different areas.
 - Be ready to publicly identify your clients, sources of information, etc.

Decision-Making Process

PRSA developed a process for analyzing situations and arriving at ethical decisions and has made it readily available on its [website](#). Regardless of the Participating Organization of which you are a member, you can use this process to analyze dilemmas, especially those in a grey area and not obviously ethical or unethical.

Here are the steps in the ethics decision-making process:

- Define the specific ethical issue or conflict.
- Identify internal and external factors (legal, political, social, economic) that may influence the decision.
- Identify the key values.
- Identify the audiences who will be affected by the decision and define the public relations professional's obligation to each.
- Select ethical principles to guide your decision-making process.
- Make your decision and justify it.

An Ethical Dilemma and Application of the Process

Assume you are the director of public relations for Megabucks Energy Company, a Houston-based Fortune 500 oil and gas exploration and production company. Megabucks' profits are declining because of drops in oil and gas prices. Recent drilling on one of the company's properties in the Java Sea has produced promising indications of a significant new oil and gas reservoir. Although geological testing is incomplete, rumors are flying in the marketplace about the potential of this new well to significantly increase Megabucks' profits. Senior management asks you to prepare a news release that responds to these rumors and downplays the significance of the find. As part of your research, you discover internal reports that show this new well is, indeed, a major discovery and further testing is planned simply to determine the size of the reservoir.

One Way to Arrive at Your Decision

- Define the specific ethical issue or conflict.
Is it ethical to disseminate deceptive information regarding the financial condition of my company on which a number of key publics may rely?
- Identify internal and external factors (legal, political, social, economic) that may influence the decision.

- What does the SEC require in such instances?
- Do federal and/or state laws require a particular decision or disclosure?
- What do company values, policies and/or procedures require?
- Identify the key values.
 - Loyalty—As a professional, commitment to your employer often comes before other obligations.
 - Advocacy—As a responsible advocate, consider both the company’s interests and the interests of the publics that may be affected by the decision.
 - Honesty—Consider obligations to tell the truth in advancing the company’s interest and in communicating to the public.
 - Independence—Retain objectivity in counseling the employers on a course of action that is in the company’s best interest both today and into the future.
- Identify the audiences who will be affected by the decision and the PR professional’s obligation to each.
 - Consider the company/employer, board of directors, shareholders/potential shareholders, SEC, government, financial analysts, financial media, employees, publics, profession, society, other stakeholders.
- Select ethical principles to guide your decision-making process.
 - Protecting and advancing the free flow of accurate and truthful information is essential to serving the public interest and contributing to informed decision making. Maintaining the integrity of relationships with media and government regulatory agencies is central to public relations practice and in the best interest of the greater public. Truth and accuracy are underpinnings of our profession.
- Make your decision and justify it.
 - The public relations professional’s greatest loyalty is typically to the client/employer; you are obligated to provide counsel and communications support that serves the best interest of the organization. At the same time, responsible advocacy requires that the interests of those affected by the decision be considered as well. In this case, numerous publics could both rely on this information and be adversely affected.

Although the potential for conflict between loyalty to employer and honesty exists, the value of independence helps resolve this conflict. Sound, objective counsel requires you to refuse to write the release and advise the company on more appropriate actions that don’t deceive the various stakeholders. Ultimately, this is in the company’s best interest since release of deceptive information could contribute to declining public trust, as well as potential legal liabilities related to proper disclosure under SEC regulations. Your recommended action preserves the integrity of the communications processes and helps maintain important company relationships, while advancing the free flow of accurate, truthful information.

Now ask yourself, in a real-life situation, might external pressures cause you to reach a different conclusion and if so, what would you then do?

➔Exercise: What Would You Do If. . .?

If you practice applying this process, its use will become second nature. With some of your PR colleagues, talk through some real life dilemmas you are facing or have faced. You can use these scenarios to get started.

Scenario 1 (From the National School Public Relations Association [NSPRA])

A school board member who has been an outstanding advocate for the district is up for re-election. He calls to ask you if you would help with his re-election campaign. He says he values your communications expertise and needs help to defeat his opponent, who is very vocal about reducing administrative positions in the district. He considers them “fluff.” In fact, your job as communications director is at the top of his list and will likely be the first to go. You know you can’t work on the campaign during working hours, but you agree to work from home on the incumbent’s campaign. You don’t plan on telling anyone else you are helping him because what you do on your own time is your business.

Scenario 2 (Adapted from the PRSA Boston Chapter)

You are working for a pharmaceutical company that wants to sell more of its non-drowsy allergy drug. One of your interns offers to go into chat rooms on health websites that focus on the topic of allergies and to tout the success she has had using this drug. She does not intend to disclose her employer or that she doesn’t personally suffer from allergies. She intends to do a content analysis on the responses for a term paper at her university.

Scenario 3

As a sole public relations professional, you are approached by a group of prominent citizens who want to advocate for the closing of a nuclear power plant. They argue that it is upwind from a major metropolis and either an accident or a terrorist attack at the plant could result in widespread fallout and loss of human life. They want you to prepare informational materials without mentioning the fact that closing the plant could result in rolling brownouts in the metro area.

Scenario 4

A counseling firm principal tells the reporter of a local daily newspaper that a competing firm is recommending to a client—whom both firms had been courting—some underhanded tactics to gain government approval of a plan to begin a new mining operation. Specific tactics included payments to elected officials. That “tip” results in a front-page feature accusing the company of planning to “buy” mine approval by paying off local government officials.

Scenario 5 (Adapted from the National School Public Relations Association [NSPRA])

You are the director of public relations for a small, private university. In the days following September 11, you receive information from an acquaintance through your university e-mail account that a local businessman, who is foreign, is allegedly involved in supporting terrorist activity by displaying a poster of Osama bin Laden in his store. You are asked by the sender to not only boycott that business, but to pass along this information to other friends and colleagues. This is not a news release of any kind, nor is it meant for public consumption. It is only an informational e-mail sent among friends. What do you do and why?

Additional Resources

Professional standard advisories and case studies are available for your further preparation. Visit www.prsa.org/aboutUs/ethics/index.html. PRSA membership is not required.

Laws for Public Relations Professionals

Copyright law: Two major goals of copyright laws are to protect the original creator of the work and to provide economic incentive for new knowledge. The statutory definition expresses that copyright exists in “original works of authorship in any tangible medium of expression. . . from which they can be perceived, reproduced, or otherwise communicated” (17 U.S. Constitution, Sec. 102, as noted in Broom, 2009, *EPR*, p. 157). Any written sources that are not original should be cited in following works. In addition, Internet references also should adhere to traditional copyright procedures for securing appropriate permissions and/or indicate proper citations.

Common law copyright: An author who creates a tangible expression of his or her ideas immediately acquires common law copyright of the work. This right continues until the author dedicates work to the public by a general publication, or surrenders common law right to obtain specific statutory copyright protection. The purpose of copyright law is to protect an author’s intellectual production. The dividing line between common law copyright and statutory copyright is publication. Statutory copyright is a legal word or act—the act by which the author makes the work available to the world while retaining control of the creative expression.

Two types of publication exist. **General publication** is any overt act that indicates the intention to surrender one’s right to control one’s creative expression and allow the public to copy the material. If there is a general publication and the author has not obtained statutory copyright and does not use the copyright symbol, ©, he has no further right to prevent the use by the public. **Limited publication**, such as delivery of a manuscript to a possible purchaser, does not cause the author to lose any common law rights.

Statutory copyright: To obtain statutory copyright, an author must submit to the Library of Congress and display the copyright symbol © on the material. Creative expression of ideas is subject to copyright.

Securing a statutory copyright is simple. Notice/use of the copyright symbol must be on the very first copy sold or publicity distributed.

Ownership of copyright for photography and artwork: The contract between your organization and the non-employee who takes photos or creates artwork determines who owns the copyright. The copyright owner determines use and the cost of use of the creative work. Be clear about the ownership of both the negatives and hard copies of photos or artwork in the contract you develop with your legal counsel. The organization owns an employees’ work done on behalf of the organization.

Defamation: Defamation is untruth that damages a reputation. Written or pictorial defamation is known as **libel**; spoken or verbal defamation is known as **slander** and need not be spoken in a public setting. To qualify as defamation, the statement must be untrue. To be defamed or damaged, an exposed person or organization must prove three conditions were present: hatred, contempt, ridicule. Damage must also be proven. Reports of official proceedings are privileged and cannot be charged with libel (see fair comment below). To be actionable for libel, five elements must be present: defamation, identification, communications (publication/broadcast), fault (malice or negligence), and damage (in absence of fault, provable damages or injury). Since a public figure puts himself or herself out before the public, actual malice must be proven by a public figure.

Fair comment: This privilege insulates a reporter or publication against defamation (libel or slander). Not a license to circulate derogatory information, the information must be related to community interest with the subject. Fair comment is a recognized defense against a libel action, based on the argument that the statement was either true or **privileged** (taken from a public document). Be aware that although **truth** is the traditional defense against libel, truth is hard to prove. **Fair comment**, which involves privacy, should not be confused with fair use, which involves copyright.

Libel has **four defenses**: truth, privilege, fair comment (all defined above) and retraction. **Retraction** is a full and prompt apology that helps mitigate damages.

Digital Millennium Copyright Act (DMCA): A U.S. digital rights management (DRM) law enacted on Oct. 28, 1998, created an updated version of copyright laws to deal with the special challenges of regulating digital material. Broadly, the aim of DMCA is to protect the rights of both copyright owners and consumers.

Fair use: This law allows use or parts of copyrighted materials without violating copyright laws and without paying a royalty or fee when used for: criticism, comment, news reporting, teaching, scholarship or research. Drawing the line as to what is fair use is one of the most difficult problems of copyright law. Fair use originally applied to printed works. With the advent of digital technology and the Internet, fair use now also applies to the redistribution of music, photographs, videos and software. Fair use is usually determined on the special facts of each case. If you begin to question how you're using something or how much you're using, be cautious. Public relations professionals should note that fair use does not apply to commercial use. Fair use that involves copyright should not be confused with fair comment that involves privacy.

Foreign Agents Registration Act of 1938: Public relations practitioners working for any "foreign principals" must register under this act, whether they are directly lobbying U.S. government officials or not. The Lobbying Disclosure Act of 1995 also relates to the above act in a broad context requiring anyone in a public relations or related position representing a foreign government to register and label lobbying materials as "political propaganda" (Broom, 2009, EPR, pp. 153-154).

Intellectual property: This legal term describes rights or entitlements that apply to the ownership and use of certain types of information, ideas or other concepts in an expressed form.

New York Times v. Sullivan: This ruled that actual malice must be proven by a public figure.

Right of privacy: This law, important for public relations professionals to know, ensures an individual's right to be left alone and can be violated if names, likeness, and/or information is used for commercial purposes. It differs from defamation and is a practical effort to protect the individual who does not relish the unexpected appearance of his or her picture, story or testimonial in the public media. The publication need only injure the feelings of the person, even though it may not have any effect on his or her reputation. Many violations evolve from advertising, which is deemed worse than articles because of the potential for direct profit. Securing permission from the individual protects the public relations professional. While use of employee photos in employee publications isn't specifically covered, it is a good idea to protect your employees' right of privacy by obtaining signed waivers. Four torts or, i.e., kinds of wrongful acts or damages, to privacy exist:

- **Appropriation**: Taking of some element of a person's name or likeness for advertising or trade purposes without consent, such as using a celebrity's photo without permission and signed releases.
- **Intrusion**: Invading a person's solitude, such as taping without permission.
- **Public disclosure of embarrassing private facts**: Truth is not necessarily a defense here (medical information, sex-crime victim identity, name of juvenile offender, embarrassing poses). Reputation need not be harmed.
- **False light**: Putting a person in a false position before the public, misleading the public to make a person appear other than he or she is (misrepresentation). Reputation need not be harmed.

Slavish copying: This term is used for extensive word-for-word copying. One can use the idea, but not the creative expression of the idea. For a violation, copying must be exact, word for word. Paraphrasing is not a violation, but without attribution, it does raise ethical concerns. Speeches quoting the ideas of another can lead to copyright violation.

Please also see sections on Business Literacy, SEC Filings, and Business Laws and Regulations.

Communication Models and Theories

Communication Models and Theories questions account for 15 percent of the computer-based Examination.

Agenda-Setting Theory

For decades, communication scholars were convinced that the media had a significant influence on the public and could influence what people thought. But, study after study showed this theory to be wrong. People did seem to be influenced by what they read, saw or heard right after they were exposed to it, depending on the medium used. Two-to-three weeks later, however, the same people showed no noticeable influence from the message.

McCombs and Shaw, both communication scholars, have published articles based on their research on how the media has an affect on cognitive levels without affecting predisposition (McCombs & Shaw, 1972) and that media not only tell people what to think about in broad terms, but additionally how to think about specific items, and then what to think (McCombs & Shaw, 1993).

In other words, the media shape top-of-mind presence regarding issues. The typical news consumer focuses on a handful of topics daily, and these topics are presented to him or her, in one form or another, by the media. With the next news cycle, a topic from the day before may disappear, and so does its importance among news consumers.

Rogers and Dearing (1996) are among those who further developed this theory and provided key concepts. The following are their definitions of agenda-setting concepts:

- The **agenda-setting process** is a very fluid, dynamic attempt to get the attention of the media, the public, and/or policy-makers.
- The **agenda** is a “set of issues.” In order for the agenda to be effective and become part of the process, it must be communicated. Agendas result from a “dynamic interplay.”

Thus, in the agenda-setting process, an interplay results between three elements: the media, the public and the policy-makers. Each of these elements has an agenda. Early research suggested this process was somewhat linear and directional. In other words, the media set their agenda, which influenced and set the public agenda, which influenced and set policy agenda.

However, more recent research indicates that agenda-setting theory can be multi-directional. A perfect example is the president calling a news conference. The White House holds the news conference, the media report about the event, and it becomes part of the public agenda.

A story appears in the news, the public becomes concerned or irate about the issue, the issue becomes part of the policy-makers’ agenda, and that leads to passage of some type of legislation. A perfect example of this is stricter laws against driving while intoxicated (DWI). A tragic accident occurs because of a drunk driver. The public becomes very concerned and contacts their legislators. The legislators then draft a law and it passes.

So how do the media set their agenda, other than disasters and breaking stories? In no small part, they set the agenda with the influence of public relations professionals. McCombs (2004) describes the importance of public relations to media agenda setting in his book, *Setting the Agenda: The Mass Media and Public Opinion*:

All the journalists in the world can observe only a small fraction of each day’s situations and events [...] Much of what we know, for example, about the workings of government and business from the international level on down to the local level originates with public information officers and other public relations practitioners who represent important news sources. These communication professionals subsidize the efforts of news organizations to cover the news by providing substantial amounts of organized information, frequently in the form of news releases prepared in the exact style

of news stories. (p. 161)

McCombs also noted an examination of *The New York Times* and *Washington Post* that revealed close to half of the news stories over a 20-year period had been “substantially based on news releases and other direct information subsidies” (McCombs, 2004, p. 161).

Agenda-setting theory is an important theory in the practice of public relations, and it also shows just how important the profession is to the channels of communication.

An Example of How You Can Use Agenda-Setting Theory

You are the communications director for the largest hospital in your city, which is opening a large addition that will give the public several state-of-the-art services and facilities (trauma, burn, pediatrics, geriatrics, etc.).

You develop a news release and press kit; in addition, you plan a grand opening that will include several local and state dignitaries.

The announcement goes out and the media are interested. You have requests from television and other media for exclusive shots and interviews. You arrange them.

You secured advance news coverage before the grand opening. You helped set the media’s agenda, as well as the public’s.

In addition to media, you also sent invitations to important members of publics most affected by the hospital. Members of these publics attend the grand opening, and you have just influenced the public’s agenda directly through the channels of direct mail and event management.

You get great media coverage the day of the grand opening, and you want to keep the new hospital services in the forefront in the minds of the media, public and legislators. So, you continue to help set agendas with follow-up features, including positive stories about people who were saved by the hospital’s advanced facilities.

Agenda setting is an important function of the practice of public relations. Now read the brief summary of the diffusion of innovations theory that follows in this study guide. Think about how agenda setting would work with that theory.

Additional Resources

Dearing, J., & Rogers, E. (1996). *Agenda-setting*. Thousand Oaks, CA: Sage Publications.

McCombs, M. (2004). *Setting the agenda: The mass media and public opinion*. Cambridge, UK: Polity Press.

McCombs, M., & Shaw, D. (1972). The agenda-setting function of mass media. *Public Opinion Quarterly*, 36(2), 176-187.

McCombs, M., & Shaw, D. (1993). Twenty-five years in the marketplace of ideas. *Journal of Communications*, 43(2), 65.

Diffusion Theory

The theory of diffusion of innovations teaches us that we are creatures of habit. Human beings do not like change. To study diffusion of innovations is to study the difficulty of getting anything new—an idea, a widget, an innovation, a political movement, etc.—adopted. It can take years to get people to readily accept an idea, use a new product, believe in a movement or vote for a candidate.

Dr. Everett Rogers spent a lifetime developing this theory. He did not originate it, but he was a graduate student who had the opportunity to participate in the early stages of the theory. Dr. Rogers earned his Ph.D. in rural sociology at Iowa State in the 1950s. Drs. Bryce Ryan and Neal Gross had conducted a study of the diffusion of hybrid corn seed among farmers in Iowa a decade earlier in the field of rural sociology.

Originally, diffusion of innovations was considered a phenomenon in agriculture and/or rural life. But using Ryan's and Gross's work as a starting point, diffusion of innovation studies gained wider application. Since then, the theory has been used in education, business, marketing, public health, medical, sociology, the technology industry and communication, including public relations, advertising and the media. Today, diffusion of innovations is an important theory for public relations professionals to study and understand. This theory can help us know how to best communicate and diffuse an idea or product.

The Diffusion Process

1. Explains how people adopt or reject change, ideas or products.
2. Reveals why major change is not accomplished in a brief time.
3. Reveals why it cannot be accomplished through news media alone.
4. Emphasizes why channels of interpersonal communication are the most effective.

Word of mouth is very important in diffusion. A public relations professional can execute the best media placement campaign of her or his career, but unless targeted audiences are talking about what they have read in the paper or seen on television, the diffusion process is stunted.

There are five stages within the diffusion of innovation process.

1. **Awareness:** An individual becomes aware of “it,” quite often through the media or mass communication channels.
2. **Interest:** An individual develops an interest in learning more about “it.”
3. **Evaluation:** An individual asks others for feedback about “it,” demonstrating the importance of interpersonal communication.
4. **Trial:** An individual uses a sample, attends a rally, etc.
5. **Adoption:** If adoption occurs, an individual may seek or respond to reinforcement of adoption decision. Some call this the re-trial or re-adoption process.

The theory also categorizes people into five types.

1. **Innovators**
2. **Early adopters**
3. **Early majority**
4. **Majority**
5. **Nonadopters (Laggards)**

Most important of these groups are the early adopters and early majority. Innovators tend to be well-educated, independent thinkers who have expendable income and contacts outside of the community or group, but are not that influential within a group or community. Early adopters are quite influential within a community or group and are also well educated, have expendable income, etc. The difference between an innovator and an early adopter is that the early adopter will not try any untried products or ideas but will be among the first to use anything that has been tested. Since early adopters are influential within their communities, they play an important role through interpersonal communication in whether or not the early majority members try and/or adopt the product or idea.

By the time the majority group is trying the idea or product, the process has diffused tremendously, and the process has reached what has been referred to as “the tipping point.” The popular book by Malcolm Gladwell looks at a very slim part of diffusion of innovations.

➔ Exercise: Use Diffusion Theory

Effective public relations professionals design campaigns to target the five categories of people and motivate them at each stage of the diffusion process using channels appropriate to that stage. Think about a new product or service launch involving your organization. How are strategies and tactics likely to change from one stage to the next?

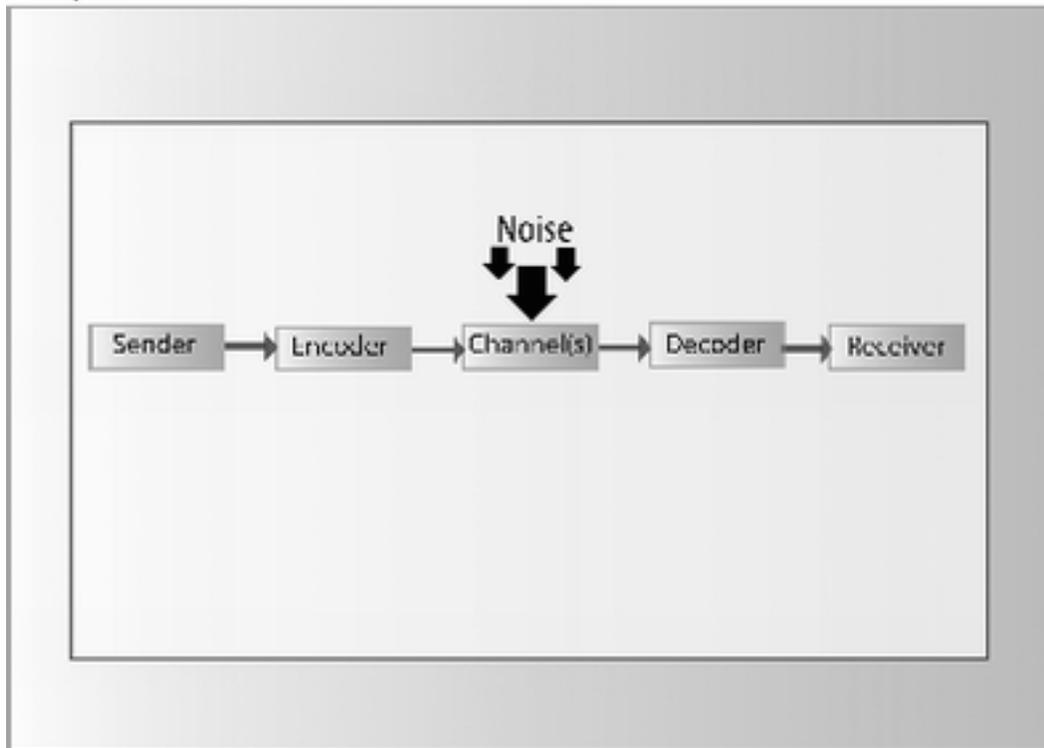
Additional Resource

Rogers, E.M. (1995). *Diffusion of innovations* (5th ed.). New York: Simon & Schuster.

Communication Models

Communication is a complex process, as all public relations professionals know only too well. A couple of commonly referenced models illustrate public relations theory. The simplest one reflects the work of two mathematicians named Shannon and Weaver.

Early View of Communications Process



The Shannon-Weaver Model

The model consists of a sender, a message, a channel where the message travels, noise or interference and a receiver. For example, the telephone converts sound or spoken words into electrical impulses that are transmitted over a telephone line (the channel). On the receiving end, the process is reversed and the electrical signals are converted back into speech. But noise can interfere with the signal and create problems in understanding the communication.

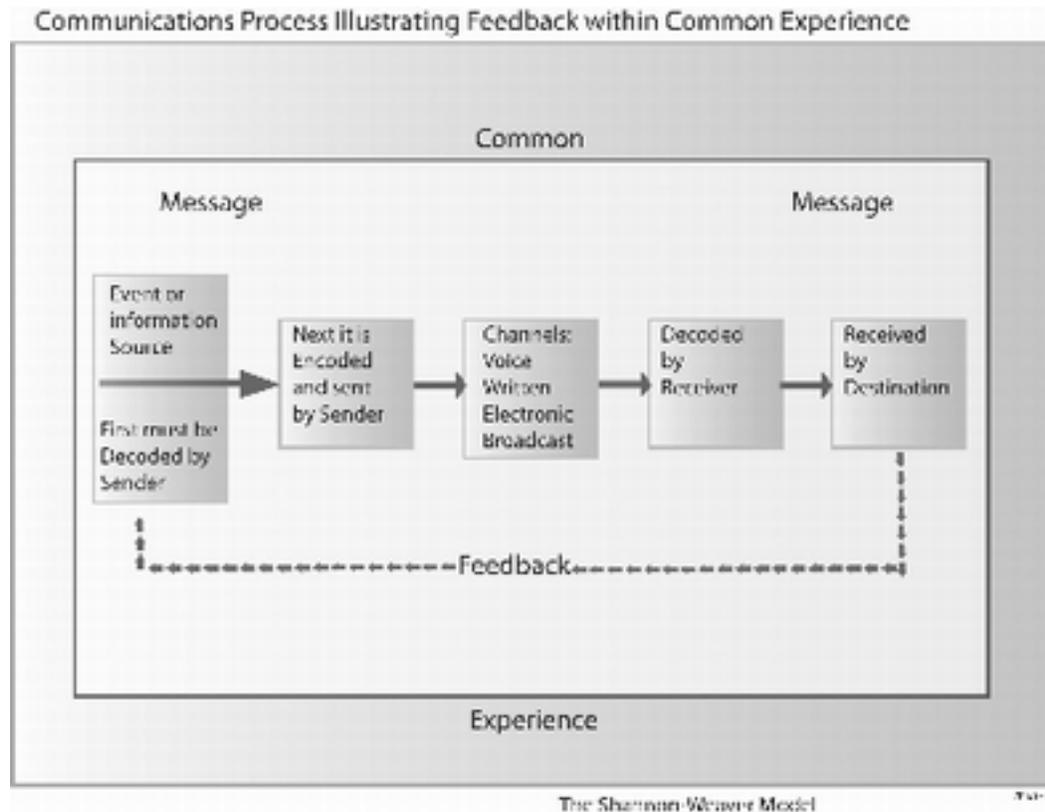
As specific messages are developed, aspects of the communication model discussed above should be considered. All elements must be effective for a message to be received appropriately by the intended audience(s). Often communicators blame the audience for not accepting a message when the sender, encoding process, or channels chosen were not correctly applied. The basic model applies to other forms of communication as well.

Speech: Thoughts are encoded into words, transmitted by sound waves and decoded by the receiver's understanding of the words—if that person is within earshot.

Pantomime: Use your body to express thoughts, transmit them by gestures or posture and the receiver will decode them by understanding your movements.

Printing: Encode your thoughts in words or typographic characters in any accepted language, such as English, Spanish, Mandarin, etc., transmit them on a printed page and the receiver will decode—if he or she can read and understand the language, characters, etc.

We can apply this model to art, music, drama, signs, symbols, graffiti and countless other ways we attempt to transmit thoughts and meaning. This first model is missing an essential step in the communications process: feedback. Without that, you don't know if the receiver received or understood your message.



Feedback follows the same process, but in reverse.

Can you apply these theories to your practice of public relations? Identify possible barriers to the communication process and decide how to overcome them.

Communication Barriers

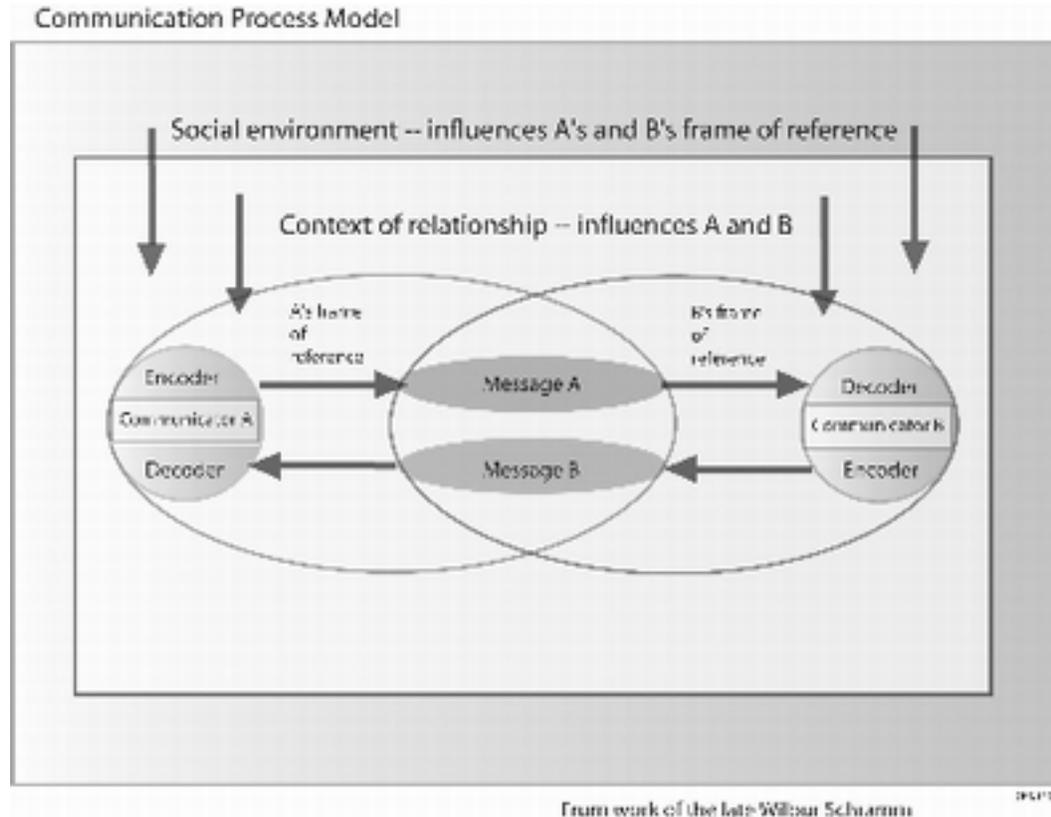
- Fuzzy language
- Misalignment with culture and values
- History of distrust
- Distractions
- Negative influencers
- Sources or spokespeople with no credibility
- Unreliable media
- Media with which people are not comfortable, e.g., blogs for some, printed material where illiteracy is high, etc.
- Captive audiences
- Gatekeepers

Model for Overcoming Barriers to Have Effective Communication

- Design and deliver the message so that it gets the attention of the intended audience.
- Employ signs that relate to experiences common to the source and destination.
- Arouse personality needs in the receiver.
- Offer a way to meet those personality needs that is appropriate to the group situation the receiver is in at the time you want that receiver to respond.

Describing factors that affect effective communication, celebrated author and professor Wilbur Schramm wrote:

Communication (human communication, at least) is *something people* do. It has no life of its own. There is no magic about it except what people in the communication relationship put into it. There is no meaning in a message except what the people put into it. When one studies communication, therefore, one studies people relating to each other and to their groups, organizations and societies, influencing each other, being influenced, informing and being informed, teaching and being taught, entertaining and being entertained—by means of certain signs which exist separately from either of them. To understand the human communication process one must understand how people relate to each other. (Broom, 2009, EPR, p. 189)



Identify people in your organization in the A and B roles of this diagram. What are the differences in their frames of reference? Where is the common ground? How are their social environments different or the same? Consider their cultures, customs, languages, occupations, etc., which make a difference.

As noted in EPR (Broom, 2009, p. 343), Walter Lippmann, author of *Public Opinion* published in 1922, described several communication barriers listed below.

- Artificial censorship
- Gatekeepers in the media
- Shrinking news holes
- Limitation of social contact
- Meager time available for paying attention
- Distortion from compressing events into short messages (sound bites in today's terms)
- Difficulty expressing a big, complicated world in short messages
- Fear of facing facts perceived to threaten established routines

Use the **7 Cs of Communication** to overcome these barriers and communicate effectively (Broom, 2009, EPR, pp. 345-346).

1. Clarity
2. Credibility
3. Content
4. Context
5. Continuity
6. Capability
7. Channels

Tools You Can Use

Creative ways you devise to work around barriers to communication become creative strategies in your public relations planning. Communication models and theories are tools public relations professionals can apply to everyday situations.

- Define your audiences, including subsets or segments.
- Identify your social relationship with them.
- Understand the context and frames of reference of your relationship.
- Encode your message effectively.
- Choose the proper medium to convey your message.

Additional Resource

Broom, G. M. (2009). *Cutlip and Center's effective public relations* (10th ed.). Upper Saddle River, NJ: Pearson Prentice Hall. (See chapters 7, 8, 13.)

Publics and Public Opinion

Identifying audiences, or publics, is one of the first steps in the planning phase of public relations programming. Typically, you identify the publics you want to reach after you've completed research about the opportunity, conducted a situation analysis and developed a problem statement. Equipped with this research, you then develop goals, identify the publics to be served, and write measurable objectives for each public.

“Publics” Defined for Public Relations

Public relations professionals refer to people or groups of “people who are somehow mutually involved or interdependent with particular organizations” as “publics” (Broom, 2009, *EPR*, p. 3). A public may also further defined as “a particular group of people with a common interest, aim, etc.” (<http://dictionary.reference.com/browse/publics>).

Within the general public, there are many publics or specific audiences. These publics respond in different ways and have different needs. Messages and communication tactics must be shaped to respond to the needs of each public. Often, publics overlap and can be segmented in multiple ways.

Following is a list of publics for an organization that could be a private or publicly held business, a not-for-profit organization, government agency, educational or religious institution or other activity. (Excerpted from *Public Relations, An Overview, Vol. 1, Number 3, PRSA Foundation Monograph Series*). Notice how the publics are identified from all sectors of a community: government, education, business, community, external to an organization and internal to an organization.

Employee

Management
Hourly vs. salaried
Prospective employees
Families
Union members
Retirees

Community

Business locations
Neighborhood coalitions
Chambers of Commerce
Community organizations
Local government

Media

General
Ethnic
Foreign
Trade, specialized

Government

Legislators
Regulatory agencies
Local, state, federal officials

Academia

Trustees, regents, directors

Administration
Financial supporters—Faculty and staff
Students, prospects—Alumni

Investment/Financial

Analysts
Stockbrokers
Institutional holders
Portfolio managers
Shareholders
Potential investors
Bankers (commercial and investment)

Industry/Business

Suppliers
Teaming partners
Competitors
Professional societies
Subcontractors
Joint ventures
Trade associations

Customer

Geographical
Local
Regional

National
International
Functional
Distributors
Jobbers
Wholesalers
Retailers
Consumers

Think about the company or client you serve. Jot down the various publics you reach on a day-to-day basis. Then, write down the specific publics served by your last public relations program, e.g., public awareness campaign, direct-mail campaign, media relations activity, etc. Were the publics the same in each instance? Probably not. Your specific program most likely targeted a segmented population within the larger group of publics you reach on an ongoing basis. By thinking through the publics with which you work, you can prepare to identify publics in given scenarios and activities outside of your public relations practice today.

The Public Opinion Process

Grunig, in his work on communication behaviors and attitudes of environmental publics, further defined publics by type. He found that publics can be grouped by the way they behave toward messages and issues, and identified four types.

- **All-issue publics** who are active on all issues
- **Apathetic publics** who are inattentive and inactive on all issues
- **Single-issue publics** who are active on a limited number of issues
- **Hot-issue publics** who respond and become active after being exposed to an issue

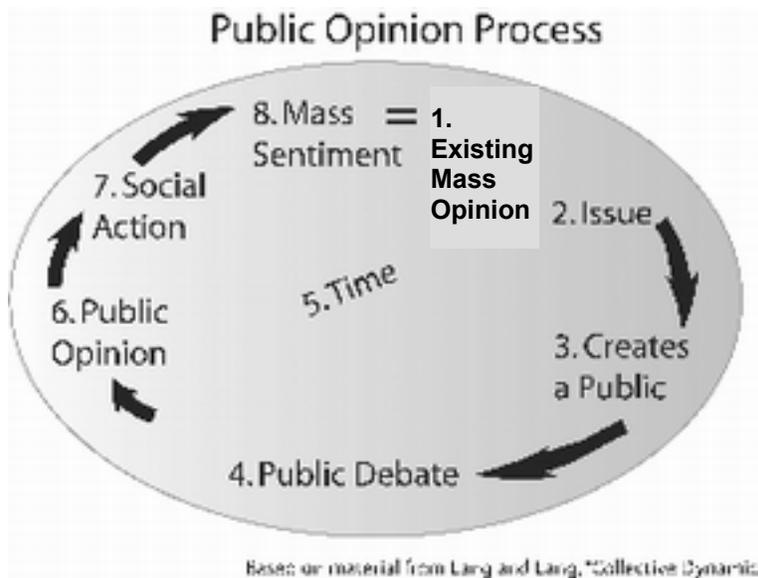
Grunig also identified another method of labeling publics: nonpublics, latent, aware, and active. Nonpublics are those upon whom the issue at hand has virtually no effect. Latent publics are not aware of their connections to a situation. Aware publics understand the importance of an issue to them, but they have not acted. Active publics are doing something about an issue. It is evident that target publics categorized in this manner will vary greatly depending upon the situation. Grunig implies that practitioners must often influence individuals in a progression from latent to aware to active on pertinent topics (Broom, 2009, EPR, p. 308).

These types of publics are important to the process of public opinion formation because influencing each of them will require different tactics. If you understand the groups of publics you must reach and the types of publics within the groups, you will be closer to reaching your objective. Now, think about how these work together with the elements that make up public opinion: opinion, belief, attitude and value.

- **Opinion:** a view, judgment, or appraisal formed in the mind about a particular matter.
- **Belief:** a state or habit of mind in which trust or confidence is placed in some person or thing.
- **Attitude:** a) a mental position with regard to a fact or state; b) a feeling or emotion toward a fact or state.
- **Value:** something intrinsically valuable or desirable; something esteemed.

Reading through the definitions, you can see that each one is more systemic to the individual and becomes progressively harder to change. People often change opinions without changing personal beliefs, attitudes or, especially, values.

What happens when individual opinions merge into public opinion? A classic early model comes from the work of sociologists Lang and Lang, in “Collective Dynamics.”



Lang and Lang observed that in any given situation, there is an existing mass sentiment or a general social consensus. At different times, people have different views about issues and, as Grunig points out, they become a type of public that will respond to an issue in a specific way. Those who fall into the all-issue, single-issue (if the particular issue affects them), or hot-issue publics will take pro and con sides with an issue, leading to public and private debate. The public debate may include publicity, staged events, polls, appeals, etc., over a period of time. This leads people to make up their minds. A new **public opinion** develops, and that can lead to **social action**, which might occur in the form of an election, a consent decree or taking a product off the market. A new **social value** has emerged and becomes part of mass sentiment. The time it took for this new social value to take hold is significant.

Example: Consider the lengthy debate about second-hand smoke in public places and today's laws against smoking in restaurants. Changed public opinion led to laws and regulations, such as non-smoking areas or outright bans on smoking in public places.

The diffusion theory presented earlier in this study guide also addresses the adoption or rejection of new ideas and the impact of elapsed time on the process.

Think about how the Lang and Lang model applies to situations you have faced in your practice of public relations. Once you understand how the process works, you will be able to more effectively write public relations plans and strategies to achieve the outcomes you want.

Additional Resource

Lang, G. E., & Lang, K. (1961). *Collective dynamics*. New York: Thomas Y. Crowell.

Research, Planning, Implementation and Evaluation

RPIE questions account for 25 percent of the computer-based Examination.

Public relations programs cannot be successful without proactive, strategic planning that includes measurable objectives, grounded in research and evaluated for return on investment. Because strategic planning is such a critical requirement for the public relations profession, the RPIE makes up the largest portion of the Examination. By knowing this process and having the skills and abilities to apply it to the work that you do every day, you can greatly increase your chances of success on the Examination and in your professional life.

Your understanding of the knowledge, skills and ability of the four-step process is evaluated on the Examination. If you are not already doing so, begin developing public relations plans using the four-step process as part of your preparation. This process will help you distinguish top-of-mind activities from research-based strategic plans that provide a return on investment and positively affect your organization's goals.

The Accreditation process focuses on behavioral public relations, strategic thinking and planning. Achieving awareness is a low-level expectation for most public relations campaigns. Higher-level practice focuses on impacting an audience's behavior, attitude or action.

Quick Self-Assessment

- Look at Grunig's Four Models of Public Relations. <http://iml.jou.ufl.edu/projects/Fall99/Westbrook/models.htm>

Do you have experience working in a two-way symmetrical model? If not, you will want to work through one or more of the case studies provided in this study guide and write a plan from the perspective of a strategist using a two-way symmetrical model.

- Review the stages and levels for evaluating public relations programs in the text(s) you have selected from the Bookshelf. (See [Readings](#) in this study guide.) Do you have experience writing plans that have both measurable objectives and a measurable impact on attitudes and behavior?

If you are confident of your ability in both of these assessments, review the glossary and test your judgment against the case studies provided in this study guide.

If you're not confident in your understanding of how to perform work at the level of planning described above, use this preparation process as an investment in your career. Preparing for the Principles for Accreditation in Public Relations beta examination could potentially change the way you might practice public relations, making you more valuable to your organization and more successful in your career.

The Four-Step Process

Different organizations and different authors use different acronyms: **RPIE**, **RACE**, **PPAE**, etc. Whatever you call it, public relations planning is typically addressed as a four-step process.

- Research
- Planning/Analysis
- Implementation/Execution/Communication
- Evaluation

Tip: Start at the beginning. Don't rush to solutions or jump into tactics before research and objectives.

Step 1: Research

Research is the systematic gathering of information to describe and understand a situation; check assumptions about publics and perceptions, and check the public relations consequences. Research helps define the problem and publics.

- WHO do we want to reach?
- WHAT do we want them to DO?
- WHAT messages do we want to communicate to each public that will:
 - Encourage desired behavior?
 - Increase knowledge?
 - Change attitudes?

Research Terms

- Primary or secondary
- Formal or informal
- Qualitative or quantitative
- Scientific method

Research Methods

What are some research considerations? (Know advantages, disadvantages and appropriate application for each.)

- What decision will be made from the research, and what information is required to support the decision?
- Available resources?
- What other parts of your organization have already done research you could use?
- Does sample selection give you an accurate assessment of your target population?
- Size of sample and universe/population?
- How will you collect data—survey, telephone, mail-in, online?
- How much time do you have?

- How scientific do you need to be; what level of confidence do you need to have in the data?
- What questions will you ask?
- How will results be used? Will the results be used internally only, or will results be made public?
- How will you tabulate your answers?

Step 2: Planning (goals, audiences, objectives, strategies and tactics)

Tip: The 10 steps for writing a public relations plan will give you the framework to assess any PR situation. Even if you're faced with a case study from an industry with which you are not familiar, walking through these 10 steps can help you look past what you don't know and effectively apply your knowledge, skills and abilities.

Goals: These refer to longer-term, broad, more global, future statement of "being." Goals may include how an organization is uniquely distinguished in the minds of its target publics.

Example: To become the recognized leader, foster continuing public support, etc.

Objectives: There is a focus here on shorter-term, defines WHAT behavior, attitude or opinion you want to achieve from specific audiences, how much to achieve, and when to achieve. Objectives should be: specific, measurable, attainable, audience specific, relevant, results (outcome) oriented, time-specific.

- Create basis for evaluation
- Include time-frame
- Include level of behavioral/opinion change (awareness, attitude, action)
- Include publics affected

Outcome objectives change behavior, awareness, opinion, support. Outcome objectives require high-level strategic thinking. "Differentiate between measuring public relations "outputs," generally short-term and surface (e.g. amount of press coverage) and measuring public relations "outcomes," usually more far-reaching and carrying greater impact (changing awareness, attitudes, and even behavior) (Seital, 2001, 145).

Process objectives serve to "inform" or "educate."

Outputs measure activities, e.g., number of contacts or news releases. Output can help monitor your work but have no direct value in measuring the effectiveness of a campaign.

Strategies: These serve as a road map or approach to reach objectives. (This includes communication strategies that target publics for change and action strategies that focus on organizations' internal changes.)

- Strategies describe HOW to reach your objectives.
- Strategies include "enlist community influentials to..." "accelerate" and "position."

Tactics/tools: These serve as specific elements of a strategy or specific tools, more specifically "how to."

- Examples include meetings, publications, tie-ins, community events, news releases, etc.
- Activities are details of tactics: six meetings, four publications, etc. Activities have dates, indicate who is in charge, attendance expected, etc.

Step 3: Implementation: Execution of the plan or communicating.

- Actual messages sent through what channels?
- How many reached targeted audiences?
- Monitoring tools for execution?

Step 4: Evaluation

- Measure effectiveness of the program against objectives.
- Identify ways to improve and recommendations for the future.
- Adjust the plan, materials, etc., before going forward.
- Can serve as research for the next phase or program.

How the Four-Step Process is Assessed for the beta Examination

The beta examination presents scenarios and requires you to apply your knowledge, skills and abilities and understanding of the four-step process to arrive at the most appropriate answer. The case studies in this study guide are intended to help you further develop your competencies in these areas.

Research

- Can you identify and select the research approach, methodologies and information-gathering needs that support planning decisions?
- Can you differentiate research methodologies: primary, secondary; formal, informal; qualitative, quantitative?
- Do you know how to apply definitions, examples and characteristics of different types of research?
- Do you understand time and budget constraints for various methodologies?
- Are you familiar with sample size? Costs, characteristics, etc., can help you identify the most appropriate research methodology for a particular situation. *Example:* If an issue requires information from legislators or CEOs, a survey is not the best tool. By knowing the characteristics or disadvantages of surveys, you know that personal interviews may be your most valid research method.

Planning

- **Audience:** Are you able to identify and prioritize audiences and segments of those audiences? For instance, employees are an audience; management is a segment of the employee audience. Some audiences are more important than others. Can you select the most important audience on a brief scenario? Do you know why this audience is important?
 - For the public relations professional, there is no such thing as “the general public.” Our total audience is composed of groups of publics with whom we can communicate.
 - In determining the most important audiences, ask whether the audience/public can help your organization achieve its goals and objectives, hinder your organization in achieving its goals and objectives, or hurt your organization in some way.

- **Goals, objectives, strategies, tactics:** Can you differentiate among the four?

Example: Given a well-written objective, two very strong strategies or tactics, and a weaker or poorly written objective, would you be able to select the most appropriate objective?

Example objectives:

- a. *Weak:* Enhance our public image.
- b. *Stronger:* Improve recall of 10 important facts about our organization—from three to five—among key media representatives by June 1 of next year.

- c. *Weak*: Improve media relations.
- d. *Stronger*: Increase by 10 percent—from 60 percent to 70 percent—positive coverage on 10 key issues by the end of the year.

Example strategies: These include media relations, public engagement, employee engagement, third-party endorsement, engage opinion leaders; celebrate success among early adopters; position the organization or its products; correction/clarification; viral online communication; information/education targeted at decision-makers, etc. *Examples of what is not a strategy:* Holding a news conference, sending a newsletter, hosting a meeting (or series of meetings); writing a news release; planning a special event, etc. These are tactics.

Messages and spokespersons: Given a very brief scenario, can you identify the most appropriate message and spokesperson? This level of knowledge can be developed in two ways: 1) Professional experience and 2) studying others, e.g., case studies in the texts, businesses or issues in the media, etc. The following principles guide our professional judgment in message development and identification of a spokesperson.

- Public relations' responsibility to act in the public interest
- Ethical responsibilities of honesty, accuracy, fairness and full disclosure
- Ethical responsibility to our client or employer
- Organization mission, values, goals and objectives
- Plan or program objectives to influence awareness, attitude or actions
- Desire to build mutually beneficial relationships
- Spokesperson's credibility, importance, likeability among key audiences
- Understand the needs, interests values and concerns of target publics
- Appreciate target public perceptions of risks and threats

Tactics and tools: Considering a range of options, can you determine the most appropriate use of tactics? Can you identify those that should be included in a plan? Listed below are criteria to consider in evaluating tactics.

- Available time and resources
- Ability to reach and influence target audiences to achieve desired objectives
- Compliance with ethical and legal guidelines
- Return on investment
- Multiple methods, multiple touch points to reinforce consistent messages

Budget: Do you understand budgeting? Do you know what to include in a budget, e.g., staff time, materials, etc.

Evaluation

Are you able to make judgments about appropriate use of evaluation? Can you link evaluation to specific audiences and objectives?

- Evaluation of success is only as good as the quality of the objectives.

- Every objective should include a statement of how its accomplishment will be measured—both criteria and tool.
- Understand the differences between measuring outputs, out-takes, outcomes. Outputs and out-takes are measures of execution and strategy. Outcomes are measures of achieving objectives.
- Measurement should be included in the plan and budget (otherwise, it won't be done).

Adapted from Texas Public Relations Association Jumpstart, 2006.

Additional Resources

Broom, G. M. (2009). *Cutlip and Center's effective public relations* (10th ed.). Upper Saddle River, NJ: Pearson Prentice Hall. (See chapters 11, 12, 13, 14.)

Lukaszewski, J. E. (2007, September). *Gaining and maintaining public consent: Building community relationships and overcoming opposition*. Public Relations Tactics. Retrieved June 17, 2010, from <http://e911.com/monos/articles/Tactics-Gaining-&-Maintaining-Public-Consent-09-07.pdf>

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Newsom, D., & Haynes, J. (2011). *Public relations writing: Form & style* (9th ed.) Boston, MA: Wadsworth, Cengage Learning. (See chapter 5, The Public Relations Planning Process.)

Smith, R. D. (2009). *Strategic planning for public relations* (3rd ed.). Mahwah, NJ: Lawrence Erlbaum. (See Phase 2 on Strategy.)

Writing a Public Relations Plan

Tip: These 10 steps for writing a plan follow the research phase. Begin here after you decide what you want to accomplish and identify the things you want to correct, prevent or preserve.

1. Overall Goals for Public Relations

- Keep these few in number. Identify no more than three to five. One may be enough.
- Be consistent with management goals and mission.
- Think in terms of end results, not process alone.

2. Target Audiences or Publics

- Groups or sub-groups with which you need to communicate (talk *and* listen).
- Consider the following.
 - Who needs to know or understand?
 - Who needs to be involved?
 - Whose advice or support do you need?
 - Who will be affected? Who has something to gain or lose?

3. Objectives for Those Audiences

- Think in terms of the awareness, attitude or action you desire—not the process but the end result.
- Articulate with verbs that reflect changes in awareness, attitude, or behavior: Recognize, acknowledge, know (awareness); Favor, accept, oppose, believe (attitude); and Purchase, participate, endorse, discard, write, visit (behavior).
- Phrase objectives in terms of specific results you desire, and what you think is possible.
- Each objective should cite an audience, outcome, attainment level (%) and time frame. (*Example:* At the end of six months, 65 percent of employees will be in a car pool or ride-share program.)
- The same objective may fit a number of audiences but strategies may need to be different.
- Consider what position you want to occupy in the mind of your audience or target publics. How should the organization, product, issue, or cause be known or perceived by the target public, and how that position will be distinct.

4. Strategies

- The military definition is the science and art of employing political, economic, psychological and military forces to support policies or achieve goals; to meet the enemy under advantageous conditions.
- In planning, how will you approach the challenge of working toward your objectives? On what can you build or take advantage in your situation? What devices will you employ?
- Your strategy may describe the diplomacy, psychology, philosophy, themes and appeals you will use, or the message you will convey.
- It may describe how you will work with community groups.
- You probably will have several strategies for an objective.
- Some strategies may serve several objectives.

- Vehicles or channels you will use to communicate can appear here, or in tactics or activities.
- Examples include media relations, third-party endorsement, and public engagement.

5. Tactics

- How will you use your resources to carry out your strategy and work toward objectives?
- You can have several tactics per strategy.
- Some plans stop with tactics, omitting detail of activities.

6. Activities

- Include specific activities required under your tactics to carry out strategies.
- Informal plans often jump from objectives to activities.
- Vehicles or channels you will use to communicate can appear here.

7. Evaluation

- Are you reaching your objectives?
- Measurement? Observation? Opinion? Feedback?

8. Materials

- What do you need to implement/execute tactics?

9. Budget

- Include out-of-pocket costs, staff time, volunteer energy, transportation, images, materials, fabrication, etc.

10. Timetable and Task List

- Who does what when? Work backward from deadline or forward from start date.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

Budgeting: Additional Tips

Budgeting must be considered in all aspects of public relations planning, whether the practitioner works for a corporation, firm, nonprofit, government entity, or other organization. Without proper budget planning, even the best plans will fail if sufficient resources are not allocated. During planning stages, managers must determine what specific actions will be undertaken by which employees or outside consultants and how much each specific activity will cost. Of course, adjustments often are made during a campaign, but funding should be estimated as closely as possible based on all relevant factors.

According to Broom, budgeting in public relations is an art and a science. Many practitioners are not familiar enough with general budgeting procedures, and relatively few have a related background in business. Public relations managers tend to focus on writing and creativity, and often budgeting is left to other offices. However, to truly reach optimal success public relations leaders should strive to estimate and manage accurate budgets.

Four basic methods or control factors relate to public relations budgeting: overall income or money available for the organization and unit, the competitive necessity of the public relations function and related areas, the specific tasks or goals set for the organization and department, and the element of profit or excess funds after expenses. In the first model, the public relations unit is often allocated a percentage of the organization's total budget. In the competitive necessity focus, competitors are evaluated, and attempts are made to match or exceed their spending. In the goal or task model, specific amounts are set aside for certain activities

deemed important for public relations. The excess profit model, or fourth example, provides funding for public relations from excess funds or profit. This method is especially problematic since it implies that public relations is a function to be considered after everything else has been budgeted!

Budgeting is most often conducted by a team of practitioners and related administrators or staff, and normally feedback from various colleagues is necessary. Broom lists three important budgeting guidelines: know prices of items (whether products or services), communicate the overall budget related to costs leading to results, and use a spreadsheet and similar software to plan and manage the program (Broom, 2009, EPR, pp. 299, 318-320).

→ Exercise: Build Confidence in Your Knowledge, Skills and Abilities in Research

Find something in the news that involves an organization outside your own field—a small business, large corporation, government entity, or nonprofit. It can be a challenge, a problem, a solution, an event—whatever is making news.

1. **Put yourself** in the shoes of the public relations professional for that organization.
2. **List** half a dozen audiences you should consider from the perspective of this role.
3. **Select** two audiences who seem to be the most significant.
4. **Think** about what you in your public relations capacity for the organization might want from the two audiences. Think in terms of awareness, attitude or action. Consider verbs such as be aware of, favor, oppose, endorse, buy, discard or others that fit the situation.
5. **Consider** what information you need before you start to plan toward your desired results. Apply what you know about research.
6. **Think of three** research activities that will provide useful information for planning. Classify each of the methods you think of as formal or informal. Remember, formal uses scientific method. Informal is everything else.

For each activity, write down the following.

- **Method:** Develop a statement for the method, such as informal interviews, focus groups (informal), formal telephone survey, informal content analysis, etc. (*Tip:* If you have trouble putting labels on your methods, go back to one of your text resources, review the appendix in this guide or visit online resources included in the links section of this guide. Can you identify research activities by name?)
- **Source:** Where is your information coming from? Employees? Customers? Local newspapers?
- **Rationale:** Write a one-sentence statement of why you are going to do this, what you want to determine. (*Tip:* A rationale is generally a good way to present research activities in a plan or report.)

Note: Other parts of the organization may have existing data or information gathered for other reasons that can be used in your planning. Seek out that information.

If possible, have your research plan reviewed by a colleague or colleagues. See if you agree on terminology and whether the activities will be fruitful. Or share it with a mentor or Accreditation coach.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

➔Exercise: Build Confidence in Your Knowledge, Skills and Abilities in Research

Case Study: Planned Parenthood

Situation

You are a loaned executive to Planned Parenthood of your state in the capital city where the organization has its offices and operates a clinic. It is the anniversary of the *Roe v. Wade* decision by the Supreme Court, establishing a woman's right to legal abortion.

An ultra-conservative afternoon disc jockey/talk show host on a 50,000-watt AM radio station in the state capital broadcasts an interview purportedly with Margaret Sanger, a pioneer in birth control in the early 1900s, who fought to remove the legal barriers to information about contraception. She founded the organization that became Planned Parenthood.

The talk show host identifies his "guest," Sanger, as favoring eugenics and being racist. Margaret Sanger has been dead since 1966, but this is not mentioned. The quotes from Sanger are authentic and were her views during the time she was alive.

- Eugenics is a philosophy of improving humanity through "selective breeding" that was a popular viewpoint in the early 1900s. (Hitler's programs to eliminate Jews wiped out support for eugenics in this country.)
- Sanger spent most of her career working for legal and public acceptance of contraception and family planning.

(*Note:* This story is true. A broadcast personality in a Midwest city actually did this.)

Exercise

What research will you recommend to assess the damage and any need for action?

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

➔Exercise: Build Confidence in Your Knowledge, Skills and Abilities in Defining the Problem, Research and Identifying Audiences

Case Study: HIV/AIDS Activism and Nurses' Residence

Situation

You are the public relations director of a nonprofit hospital in a competitive market in a midsized city located in a metro area of 350,000 people. It is sweeps week for broadcast media. One of the stations is running a series on HIV/AIDS in the community. Recent segments have included those listed below.

- The need for a confidential clinic
- Homelessness related to HIV/AIDS
- How persons living with HIV/AIDS suffer from being outcasts
- How understanding has increased in some circles but prejudice remains in many.

An appealing case of a hemophiliac who acquired HIV/AIDS through transfusion at the university hospital has been reported in the series. The university and its teaching hospital are located elsewhere in the state.

At a staff meeting this morning, you learn that petitions are circulating in the community to request your hospital to convert its former nurses' residence into a clinic and residential shelter for HIV/AIDS patients. You no longer maintain a school of nursing. The three-story brick building has been used for miscellaneous administrative purposes since nurses' training was phased out. The residence is connected to the hospital by an elevated corridor, similar to a skywalk. It does not have facilities for food service or laundry. Nurses always ate at the hospital and the hospital handled their laundry. The residence and hospital are served by common systems for hot water, steam heat, ventilating and sewer. The building predates central air conditioning.

The human resources director reports that the business agent for kitchen and laundry workers, who are represented by a union, has already made informal contacts about this proposal, suggesting that grievances will result, at the very least, and a strike could ensue.

Your director of volunteers expresses concern about reaction of volunteers who now handle many peripheral duties.

Your physical plant supervisor, who lives in the neighborhood, says neighbors are already anxious over the possibility of HIV/AIDS patients in their vicinity.

Your hospital's five-year strategic plan, which was recently updated, has no mention of developing an HIV/AIDS specialty.

Exercise

Define the problem.

1. What research will you perform to assess this situation?
2. Identify five important audiences or publics to consider in your plan.
(*Note:* Not all important publics are mentioned in this case study)

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

➔Exercise: Build Confidence in Your Knowledge, Skills and Abilities in Developing Objectives and Strategies

Situation

Go back to the situation from the news exercise earlier in this section and pick up where you stopped.

1. **List** half a dozen audiences you should consider from the perspective of this role.
2. **Select** two audiences who seem to be the most significant. Choose at least one where money comes into play—customers, investors, contributors, vendors, dues-paying members, others?
3. **Think** about what you in your public relations capacity for the organization might want from these two audiences.
4. Think in terms of awareness, attitude or action—the end result you want.
5. Consider verbs such as be aware of, favor, oppose, endorse, buy, discard or others that fit the situation. These are your objectives.
6. Now, consider your **strategy** or strategies for working toward your end result for each audience. You may have one or more strategies for each audience; you may have strategies that fit both of them.

Tip: Your objective or end result is the “what” in your thinking. It’s what you hope to accomplish with the selected audience. Your strategy is the “how.” How can you do this effectively, efficiently, on someone else’s nickel, using someone else’s credibility, bypassing barriers to communication, or otherwise to your advantage? Military parallels may help here. Your objective might be to defeat the enemy at a site you’re approaching. Your strategy might be to attack under cover of darkness, or circle around behind the enemy and cut off reinforcements, or create a diversion to distract attention, or any number of other clever maneuvers. Try to come up with clever ideas you can use to gain an advantage.

Caution: Do not think in terms of specifics and details—things you would do to carry out your plan. These elements are tactics, which are subdivisions of a strategy and must link to the strategy. Don’t rush into planning tactics. Back up one step and identify the broader strategy—the approach you are envisioning that will help you move faster, conserve your resources, avoid waste, and stay on target. For most of us, tactics come quickly to mind. We jump right to them. In the planning stage, we may have tactics in search of a strategy. Take the time to identify your strategy. It’s probably already there, hiding in your list of tactics. It’s important for many reasons. When you need to justify your plan to supervisors or clients, laying out your strategy or strategies is a basic step.

Share your notes with a colleague. Ask him or her if the difference between what and how is apparent. Or talk to a mentor or Accreditation coach.

Note: Theoretic implementation is difficult. Develop your knowledge, skills and abilities in this area so that you can choose best or most appropriate strategies based on a brief scenario. Also be prepared to evaluate your outcomes. You may want to work through the order of implementation for strategies and tactics for these last two exercises, and continue through the evaluation to determine if your planning had the results you and your leadership team expected.

For implementation strategies, tactics and tools, think about what you will do as a public relations professional. Apply your knowledge, skills and abilities to these scenarios and to the planning process. Also, refer to texts on the [Short Bookshelf](#), and review the case studies and plans provided at the end of this study guide.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

Plan Formats and Styles

Public relations plans come in many formats. There are two commonly accepted formats you may want to consider: a **grid format** or a **paragraph format**. These formats are presented as suggestions only. If your planning style is different, use it. Just be sure you address all four parts of the process.

You may also want to use these formats to work through case studies presented in this study guide. Practice in writing plans will develop your knowledge, skills and abilities in public relations, which will help you more easily process information and situations.

Paragraph Style Plan

1. Problem—(1 – 3 sentences)
2. Situation analysis—Summary of research findings, opportunities and concerns
3. Goals—(overarching)

For the remainder of the plan, repeat these items for each audience:

4. Audience
5. Objectives (both long-term and short-term)
6. Communication strategy
7. Messages
8. Tactics/tools
9. Budget (budget summary common at the end of a plan)
10. Staffing/responsibility
11. Timeline
12. Evaluation
13. Summary documents
 - Budget
 - Materials list
 - Task list and timeline

Courtesy of Minnesota PRSA, APR Study Session Handout, 1999.

Grid Style Plan

(Note: Tables should be expanded as needed for additional details.)

Problem
Situation/Analysis
Goals

Repeat below for each audience.

Audience:

Objectives:

1. State specific objective for this audience.

Communication strategy	Messages	Tactics/tools	Budget	Staff/responsibility	Timeline	Evaluation
1.						
2.						
3.						

Courtesy of Minnesota PRSA, APR Study Session Handout, 1999.

Methodologies

➔Exercise: Advantages, Disadvantages, Applications

Take notes from your readings on the chart below. Completing it in your own words will help you develop a stronger understanding of research concepts. Once you have completed it, check your chart against the answer key that follows.

Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages
Focus groups						
Intercept interviews						
Telephone surveys (based on random sampling)						
Mail survey						
Online/e-mail survey						
Content analysis						
Communications audit						
In-depth interviews						
Phone interviews						
Complaint reviews						

Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages
Tracking – calls, purchases, hits, actions, placements						
Observations – visits, field reports						
Advisory panels						
Community forums						
Media analysis						
Lexis/Nexis Literature review						
Fact finding						
Historical research						
Internet research						

↑ Answer Key: Advantages, Disadvantages, Applications

Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages
Focus groups		X	X		Speed Efficient for qualitative data gathering Ability to explore associations, relationships, reactions, etc. Can use supporting materials Allows respondents to react to one another Provides the possibility of learning completely new information	High cost Low external validity Requires multiple sessions for reliability (at least two) Difficult to interpret Difficult to generalize Limited content domain Information obtained is subjective Results cannot be charted and graphed Management may not accept results as well as they would survey data Good results depend heavily upon experience and objectivity of person conducting the focus groups
Intercept interviews		X	X		Ability to target a geographic location or demographic group Ability to clarify, probe Can use supporting materials	Limited in length and scope
Telephone surveys based on random sampling	X		X		Speed of administration Ability to clarify, probe No geographic limitations No sampling limitations Accepted as industry standard	Requires professional phone bank Cost Limited in length and scope Not good for rankings, paired comparisons, evaluation of messages
Mail survey	X		X		Can be internally administered No cost differences based on geography Can use rankings, comparisons Can do message evaluations Can be included in existing communication tools Convenient for respondent	Slow to completion Considerable time/labor commitment for data entry Limited control over who completes Little ability to clarify question wording, meanings Limited ability to use filter questions Sample limitations Cost can be high if response rates are low Often yields very low response
Online/e-mail survey	X	X	X		Speed of data collection, Lower cost of administration Excellent tool for known populations with access to technology Can combine data collection methods and gain advantages over telephone and mail methods Can disaggregate results	Best with known populations Requires access to technologies May be difficult to generalize to larger groups or populations Requires disciplined administration and ability to randomly sample from within universe to qualify as formal research; most often

Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages
					easily for analysis	is informal.
Content analysis	X	X	X		Can apply same scientific sampling methods used in social surveys to establish reliability and validity Relatively low cost Easy to replicate, extend over time, sources, etc. Measure latent content characteristics and manifest content characteristics Can be combined with other research methods.	Requires careful definition of units of measurement, units of observation and attributes coded Labor intensive, or use of specialized software Value often limited to comparative descriptions or profiles
Communications audit		X	X		Assesses PR activities alignment with organization goals Can provide comprehensive evaluation of communication tools used to support many plans and programs Provides independent evaluation of PR plans	Can be costly Requires thorough definition and planning to do well Labor intensive Combines all disadvantages of focus groups, personal interviews and content analysis
In-depth interviews		X	X		All the advantages of telephone and mail methods Ability to collect unobtrusive information Extensive use of supporting materials Complex probes Validation of respondent identity (Best method for highly paid professionals and busy people)	Very expensive Potential safety risk for interviewer Difficult to monitor for quality Requires highly trained interviewers Slow to complete Geographic limitations Access limitations Interviewer effects may become significant
Phone interviews		X	X		All the advantages of telephone and mail methods Ability to collect unobtrusive information Extensive use of supporting materials Complex probes Validation of respondent identity No geographic limitations Can be completed more quickly than in person interviews	Expensive Difficult to monitor for quality Requires highly trained interviewers Access limitations Interviewer effects may become significant
Complaint reviews		X	X		May provide direct measure of impact objectives Provides early warning of emerging issues May provide baseline data of attitudes and perceptions Provides foundation for formal research	Limited ability to project onto greater population Validity reliant on accuracy/completeness of collection process
Tracking calls,		X	X		May provide direct measure of impact objectives	Limited ability to project onto greater population
Principles for Accreditation in Public Relations Beta Study Guide ■ © 2012 UNIVERSAL ACCREDITATION BOARD ■ PAGE						
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Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages
purchases, hits, actions, placements					Provides early warning of emerging issues Collects information on performance of campaign May measure effects on attitudes, behaviors, perceptions	Should be combined with other research methods
Observations or visits, field reports		X	X		Ability to probe for insight Easily/quickly accessible Provides foundation for formal research	Limited ability to project onto greater population Geographic limitations Low inter-rater reliability
Advisory panels		X	X		Ability to probe for insight Easily/quickly accessible Provides foundation for formal research	Limited ability to project onto greater population
Community forums		X	X		Ability to probe for insight Provides foundation for formal research	Difficult to assemble representative sample Limited ability to project onto greater population Requires highly skilled facilitator
Media analysis		X	X		Identifies appropriate budget and media strategies Identifies what media opportunities exist Comparison of how competitors are spending media resources	Check for completeness, accuracy Assessment limited to output objectives not impact objectives
Lexis/Nexis Literature review	X			X	More efficient (time and money) than primary research methods Advantages of credibility, standardization and longitudinal stability	Requires access to database Can yield large quantities of data to review
Fact finding	X			X	Directly answers questions Contributes to insights Provides foundations for primary research	Needs to be evaluated for completeness, accuracy, quality
Historical research		X		X	Directly answers questions Contributes to insights Provides foundations for primary research	Needs to be evaluated for completeness, accuracy, quality May be time consuming (especially for pre-2000 public records)
Internet research	X	X		X	Directly answers questions Contributes to insights Provides foundations for primary research	Needs to be evaluated for completeness, accuracy, quality

Adapted from Minnesota PRSA, APR Study Session on Research presented by Professor Albert Tims, University of Minnesota.

Content Analysis

What is Content Analysis?

Content analysis is the objective, systematic and quantitative description and evaluation of the content of documents, including print media and broadcast media coverage. In content analysis, we attempt to objectively code and describe the content of communication. Content analysis involves selecting a unit of analysis, defining categories, sampling and coding.

Ways to Use Content Analysis

- To describe and evaluate the contents of a message
- To compare media such as television with newspapers
- To study trends or changes in content of a medium over time
- To analyze international differences in communication content

Content Analysis Process

1. Select the unit for analysis or portions of the message to be analyzed.
2. The most commonly used unit is the total item. Examples of items are newspaper stories, magazine articles, radio newscasts, and television programs. The entire item can be analyzed, such as a news story, or only portions of it, such as television program segments.
3. Decide whether to study samples of the population or to study the entire population. When studying the content of messages that may be affected by outside events occurring over short periods of time in-depth, it is best to study the entire population. *Example:* A study of news coverage of the events in Iraq in 2005 by the *New York Times* would require analysis of all 2005 issues of the newspaper. As the purpose of the study becomes more general and broader in scope, and as the time period and number of messages increase, sampling may be useful. To describe the types of news items (news categories) reported in the *New York Times* over the last five years, you would sample issues from each year rather than analyzing all issues. As with surveys, sample size will depend on margin of error, confidence level and variability of the contents being studied.
4. Define the categories of analysis, or the categories that will be used to describe the contents. Some categories often used are subject matter (what is said—for example, news categories of crime, economics, weather), direction (whether a particular item is pro, con, or neutral, as in analysis of news coverage of a political candidate), values (whether certain values are found in the contents, such as achievement motivation, fatalism, materialism), and theme (whether certain themes are found in the communication content, such as prejudice, violence, and stereotypes). Categories should be clearly defined before the study. They should fit the needs of the study, be exhaustive (describe all of the material being considered) and be mutually exclusive (a coded item should be placed in only one category). Pretest categories to determine whether they fulfill all of these requirements.
5. After categories have been defined, begin the analysis. At least three coders should work independently. Ratings by only one coder may not be objective because they may be affected by his or her values, experiences or needs. With three coders, assess objectivity of the ratings by computing a coefficient of agreement. This is the degree to which coders agree on assignment of items to categories, or on their ratings of the items. This generally requires agreement of 80 percent or more. If there is high agreement, then procedures and categories are valid.

6. Conduct data reduction and analysis of results. Present results using descriptive statistics such as means and percentages, and cross tabulations. Relate results back to the study's original hypotheses or objectives. The main criteria for evaluating content analysis studies are the adequacy and clarity of the categories and the degree of agreement among coders. As in any study, be concerned with internal and external validity and whether the objectives were met.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA, and Henry Bonomi, Ph.D., APR.

Survey Research

What is Survey Research?

Survey research is a quantitative method that uses a series of written, verbal, or online questions to sample a desired “universe”—a population or group of people. The important part of this method is developing questions that answer your research question without threatening the people you are surveying. Surveys can be mailed, e-mailed, telephoned, asked in person, or completed online. The techniques used for these different survey formats vary widely.

Survey advantages

- Planned correctly, a survey makes it easy for the person to participate.
- People participating can remain anonymous.
- The same questions can be asked in several ways to double-check the response for accuracy.
- You can place questions in a sequence that will help get answers for even threatening subject matter.
- Survey answers that can be quantified can be analyzed by a computer and tabulated rapidly in multiple ways.
- You can pre-mail a product and follow up with a survey.
- Surveys can be used in a variety of forms: in-person interviews, written documents and telephone questionnaires.

Survey disadvantages

- People surveyed may not answer all questions.
- People who respond may not be part of the universe you intended to sample.
- If you use open-ended questions, it is unlikely that you can statistically analyze them and tabulating by hand is labor and time intensive.
- It is easy for people to give habitual responses.
- People don’t necessarily return surveys.
- Costs to mail a survey and provide return mail, and for gimmicks, can be expensive.
- People won’t write a lot.
- People can and do lie.
- If open-ended questions are not specific enough, the answers will be too broad.
- You can’t test knowledge with mailed surveys.

Determine the Best Survey Method

- Use **personal interviewing** for complex situations that require extensive explanation or context. Use personal interviewing for subjects who are difficult to access. This is the best possible method for results. It also is the most expensive and rarely used.
- Use a **telephone survey** for basic, well-defined opinions.
 - Hold length to 5 to 10 minutes.
 - Use professional phone callers if possible.
 - It is possible to get nearly 100 percent response.

- **Mail surveys** are the most effective for well-defined concepts and specific limited answers. They rarely produce high response rates.
 - Mail to the right people.
 - Use a cover letter.
 - Sending a postcard announcement before the survey increases response rates.
 - Follow-up mailings can also improve response rates.
- **Web or Online-based surveys** that participants access through special URLs are increasingly common. Advantages include greater convenience for respondent, immediate electronic tabulation of results and lower costs. Among disadvantages are securing e-mail addresses and low response rates due to spam filters, the impersonal nature of the process and ease of leaving the site with a mouse click.

How Should you Ask Your Questions?

- **Open-ended questions** allow respondents to answer in their own words, but present problems of interpretation and analysis.
- **Multiple-choice questions** give a respondent several options. Be sure to include an “other” category.
- **Yes and no questions** serve as good, qualifying questions to make sure the respondent has the characteristics of the group you want to test.
- **Ranking answers**, putting items in a rank order, is useful.
- **Opinion measurement** or “agree” or “disagree” questions can be used. Often this is offered on a multi-point continuum known as a Likert Scale.
- **Verbal/numbered scale questions**, known as a Likert Scale, are best for determining intensity of feeling about a subject.

Examples: One method is strongly agree, somewhat agree, neutral, somewhat disagree, strongly disagree; or circle a number on a five-point or seven-point scale where one end is “strongly agree” or “strongly approve” and the other end is “strongly disagree” or “strongly disapprove.” Other terms can be used with the scale, of course.

Method for Conducting Surveys

1. Write the research question.
2. Review the literature and develop a hypothesis (what you think you might find to be true).
3. Select the audience or universe.
4. Decide on the format—phone, mail, in-person, etc.
5. Plan the arrangement of types of material—non-threatening questions, threatening questions, demographic data (age and income sometimes threatening).
6. Develop the questions.
7. When writing **non-threatening** questions, remember:
 - Closed-response questions give you more data faster—answers such as Yes or No or 1, 2, or 3.
 - Open-ended questions give you a range of data and may bring up ideas you had overlooked.
 - Keep your questions specific.

- Use words everyone can understand.
 - People are more likely to remember things about themselves.
8. When writing **threatening** questions, remember:
- Create an environment that lets people comfortably answer questions.
 - Open-ended questions work better.
 - Ask long questions.
 - Stay away from technical terms.
 - Phrase your question in terms of “most people you know.” People are usually more willing to talk about others.
 - Go back to past behavior before you ask about present behavior.
 - Cluster questions about deviant behavior with other deviant behavior.
 - Put threatening questions toward the end of the interview.
 - Remember, answers to threatening questions may be lies.
9. When writing **knowledge** questions, remember:
- Make sure questions aren’t too easy or too difficult.
 - Sugarcoat questions, e.g., do you happen to know?
 - Simplify questions and answers.
 - Leave questions with numerical answers open-ended.
 - If you use yes/no questions, use related questions later to double-check.
 - Do not use mail to test for knowledge.
10. When writing **attitude and opinion** questions, remember:
- Be very specific.
 - Keep the affective (feeling), cognitive (knowledge) and action aspects in separate questions.
 - Gauge the strength of responses by providing a scale for answering.
 - Start with general questions; move to specific questions.
 - Group questions with the same underlying values together.
 - Start with the least popular proposal.
 - Use neutral terms, for example, the president, not President Smith.
 - Ask close-ended attitude questions.
11. Write questions so answers will be easier to tabulate.
12. Put the questions in order.
- Put like questions together.
 - Start with non-threatening, go to threatening.
 - Ask demographic questions last. They are seen as threatening.
 - Diagram questions in a flow chart to see the logic.

- Don't make your survey too long. Some topics require a longer survey.
 - Start with general questions, then go to specifics.
 - Go forward or backward in time, but don't jump around.
 - Reverse scales to eliminate habitual responses.
13. Format the survey.
 14. When formatting written surveys:
 - Use a booklet or paper folded in half to prevent loss of front or back page.
 - Put identifying characteristics on first page—who, what, why, etc.
 15. Pretest the survey with people who know about the study and make any needed alterations.
 16. Pre-code the answers and recheck the format.
 17. Conduct a pilot test by surveying a small number of the group you want to check.
 18. Initiate the full-scale survey.

Sample Size

How Many to Survey?

There are complex formulas for this purpose. The mathematics have all been done for you and are standard information. See the charts provided in this study guide.

Types of Samples

- **Census:** A 100 percent sample. Identify all the people in your universe and give each one an opportunity to respond. Especially useful with small well-defined populations. If your universe is under 300, consider a census.
- **Probability samples:** A scientific sample drawn in such a way that the probability of being chosen is equal or is known. A random sample is a good example.
- **Nonprobability samples:** More informal selection of persons to be interviewed.
 - **Convenience or accidental.** Drop by the company cafeteria and ask questions of whomever you find there.
 - **Quota.** In a school, find 10 elementary teachers, 10 middle school teachers, and 10 high school teachers. Any 10 of each kind.
 - **Dimensional.** Identify a specific number of male or female employees, employees in clerical or technical jobs, employees who are married or single, or some combination of characteristics such as married female technical workers. Any employee is acceptable if he or she matches the dimensions.
 - **Snowball.** You may know only a few users of a certain type of computer, but they probably know other users. You contact the first few and ask them for names of others. Proceed in successive waves of questioning to find the universe you desire.
 - **Purpose.** Identify a sample that suits your purpose. For a quick check among music lovers, do intercept surveys in the lobby before a symphony concert. For opinions of golfers, hang out at the 19th hole and buttonhole people. For business executives, choose a specific location or industry and contact staff officers identified in annual reports of selected companies.

Nonprobability sampling is easier and faster than formal methods and can be considered to be representative of the total population that interests you. While it can give you quick clues to a group's opinions or behaviors, it cannot be projected on to the universe.

Courtesy of Henry Milam, Ph.D., APR.

Sample Size and Accuracy

This table shows the effect of sample size on accuracy in a random sample. The illustration is for populations of 100,000 or above, where a random sample of 384 will yield a confidence level of 95 percent with a margin of error of plus or minus 5 percent. If you wish to reduce the margin of error, you must enlarge the sample substantially. To achieve a + or -4 percent margin, the sample must be nearly doubled to 600. To lower the margin of error by another point to + or -3 percent, the sample must be more than 1,000. These figures become significant if you are planning telephone interviews at a fixed cost per interview of \$25 or more. Five percent is often regarded as sufficiently accurate.

Sometimes, researchers over sample for greater reliability or comfort level or to ensure subgroup samples are of sufficient size to provide reliable analysis. Reducing the size of the sample below 384 raises the margin of error and makes the results less dependable. With a sample of 96 or 100 interviews, for instance, the results obtained in the survey could be 10 percentage points above or below the actual level, and could be seriously misleading. You might show 55 percent approval where the reality is 45 percent or 65 percent, or somewhere in between. If you wish to be sure of a majority, that's serious. The same considerations apply in sampling smaller populations.

Size of sample of population of 100,000 and above necessary to be fairly sure (19 chances in 20 or 95 percent confidence level) of accuracy to within specified limits of error, expressed in + or - percentage points.

Limits of error + or -	Sample size
.25%	153,658
.50 %	38,415
.75 %	17,073
1 %	9,604
2 %	2,401
3 %	1,067
4 %	600
5 %	384
6 %	267
7 %	196
8 %	150
9 %	119
10 %	96
15 %	43
20 %	24
25 %	15
30 %	10
35 %	8
40 %	6

Survey Research Tips for Do-It-Yourselfers

1. Before you start, decide how you can tabulate the results.
2. Keep the survey as short as possible, by mail or phone.
3. Start with general questions and progress to more specific items.
4. Start with non-threatening questions, things people would be willing to talk about with anyone.
5. Put threatening questions, things that might be embarrassing if talked about in public, near the end after you have gained the rest of the information you want.
 - Personal habits (drinking, gambling, fighting), fired, arrested?
 - Most demographic questions (age, income, race/ethnicity, marital history, children) are seen as threatening. Put them at the end unless you need them earlier. Remember that people may terminate a survey in writing or on the telephone when they encounter threatening questions or questions that reveal lack of education.
6. Avoid knowledge questions that seem like a test. Make it easy and comfortable to respond.
 - “Do you happen to know . . .?” or “Have you run across these terms . . .?” “Based on what you know right now, what do you think about . . .?”
7. When writing questions about attitudes, write separate questions for each of the following:
 - Affective “How strongly do you approve of . . .?”
 - Cognitive “How familiar do you happen to be with . . .?”
 - Action “How likely would you be to [do something] . . .?”
8. Scaled questions help you judge the strength of the response.
 - Strongly approve/somewhat approve/somewhat disapprove/disapprove is an example.
 - A five-point or seven-point scale (Likert scale) may also be used.
 - i. Indicates that the largest number means the strongest response.
 - ii. Makes averages easier to understand.

Example: In view of how times are changing, how well do you think our schools are preparing students for the future—conditions they will encounter after graduation?

Very well	Average			Not very well	No opinion		
7	6	5	4	3	2	1	0

You can compute the average or perform other statistical operations using this kind of response scale.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

Focus Group Research

What are Focus Groups?

Focus group interviews are focused discussions led by a moderator and involving eight to 12 participants each. This observation technique is popular for marketing and public relations research. It is qualitative research.

Why Do We Use Them?

- Focus group interviews help us explore the feelings people have for a given product, service or idea. They help us understand the language people use to express these feelings.
- Focus groups help us gain insight into why people feel the way they do. They may reveal misperceptions or misunderstandings about a given product, service or idea.
- Focus groups are valuable and often sufficient by themselves to test market assumptions regarding the emotional responses people are likely to make to a given concept.
- Focus groups are useful to pre-test creative ideas or to seek creative ideas for expressing benefits of a product, service or concept.
- Focus groups are helpful in identifying what benefits the market or public is most likely to associate with a product, service or idea.
- Group interviews tend to have a synergistic effect on how individuals respond. The group interaction typically stimulates a broader range and, sometimes, a greater depth of response, than one would get from individual interviews.
- Clients tend to like focus group interviews. They like the direct contact. They may trust relatively unstructured, verbatim responses more than numerical data from surveys.

Uses with Surveys

- **To precede a survey**—Because of their power to expand on the feelings and ideas of people and how they express these feelings and ideas, focus groups are useful to precede surveys. They help expand our understanding of what is to be surveyed and help identify the language to be used in asking the survey questions. They give the researcher and client overviews of trends, themes, variables, issues and points for survey questionnaire design.
- **After a survey**—Focus group interviews are useful after the survey is completed to explore in-depth problems and/or opportunities that may be observed in the analysis of surveys.

Limitations of Focus Group Interviews

- Because they are qualitative research, not quantitative, focus groups cannot be used to statistically measure human behavior.
- The individuals interviewed are drawn at random from the populations to be studied, but their numbers are too few to offer any statistical assurances of the validity and reliability of the observations.
- One knows only the feelings of the group interviewed. This makes it critical to conduct a **minimum of two interviews** with a given market or public whenever possible. This affords the opportunity to demonstrate that the behavior observed in the first group may be more likely to represent the population being studied through replication of observation. The second interview often provides the opportunity to gain additional insights and helps avoid a group bias resulting from a line of reasoning that may have been set in motion.

Parameters for Focus Group Research

The Setting

Spontaneous and emotional responses are sought in qualitative research. Once a respondent thinks, censors or intellectualizes, the response is no longer a qualitative one.

The biggest danger of qualitative research is ending up with only considered, intellectual answers. The only kind of participant who can make a fresh, spontaneous, involved, honest contribution is one who has not pre-thought his or her answers. It is incumbent on the group moderator to make that kind of response possible.

The entire setting and mood of a focus group session must be relaxed and as natural as possible. The moderator creates a coffee klatch mood so people can open up and talk in their own comfortable way.

If a one-way mirror is being used, there is no need to disclose that fact or its purpose. Do tell participants that they are being recorded for note-taking purposes. Videotaping may occasionally be desirable but it is of questionable value, particularly if known. Those mechanical devices upset the natural climate.

Group Characteristics

The optimum size for a group is eight to 12 people. Generally, the group should be relatively homogeneous (men, women, age group). But, there may be times when it is desirable for purposes of confrontation or simulation to mix demographics. This can be used to reduce costs.

Physical Location

Ideally, you can use a focus group laboratory with a one-way glass viewing port and built-in sound recording. If not, select a pleasant, quiet room in a relaxed setting. Conference rooms, kitchens, motel meeting rooms and hotel guest rooms are all good options.

Length and Time of Interview

One-to-two hours in length is best. Groups with adults are usually conducted in the evening. Start no earlier than 6 p.m. End by 9 p.m. You may conduct two back-to-back sessions in the same evening. Other special-interest groups such as homemakers or children may require different hours. For businessmen and businesswomen, midday sessions with a box lunch or light catered-in food may be most appropriate. Allow 90 minutes. Tell participants to schedule two hours so that you will be able to excuse them early.

Group Recruitment

Participants can be selected randomly using telephone directories, personal inquiries, mailing lists or passersby. Clients may have membership lists or customer lists to use for recruiting. Decide what characteristics you want in participants such as age, gender, residence, occupation, with or without children, etc. Screen all participants to meet pre-set demographic criteria. As an alternative, use a professional recruiting service, retained by the hour or paid per participant.

Preparing for the Focus Group Interview

1. Gain a thorough understanding of the research task. Be prepared to help your client, the head of your company, etc., understand it.
2. Specify participants' age, sex, location and other relevant demographics. Exclude people who work in marketing, advertising, public relations, the same competitive field, or professional respondents.
3. Define the reasons for research and the specific area to be covered.
4. Make a list of questions to be explored. Start with the general and move towards the specific. Organize areas or topics. Have a beginning, middle and end.
5. Use a discussion guide or moderator's script.

6. Make sure the setting will be comfortable. Sit around a large table if you want. This creates an environment of “We’re here to do something.”

Conducting the Interview

Experience is the best teacher. There is no best way to do it. The moderator’s skill requires the ability to keep people called rushers from dominating the discussion or avoiding participation. The moderator stays on top of the discussion, balancing friendliness and directness to keep discussion moving. Groups respond well to lively leadership that keeps discussion vigorous by intervening when needed. The moderator’s interest in the topic and alert listening are keys to success. The key to successful rapport is to make a participant feel his or her feelings are important.

If clients or company executives attend, keep them unseen and unheard. Don’t let them take over until after the main discussion is finished.

Courtesy of Henry Milam, Ph.D., APR, and Ferne G. Bonomi, APR, Fellow PRSA.

Scientific Method Research

The scientific method suggests a series of small steps, or that one study or one source provides only an indication of what may or may not be true.

- The scientific method is self-correcting in that changes in thought or theory are appropriate when errors in previous research are discovered.

Example: Scientists changed their ideas about the planet Saturn after information gathered by the Voyager spacecrafts led to uncovering errors in earlier observations. In communication, researchers discovered that an early perception of the power of the media was incorrect. After numerous research studies, they concluded that behavior and ideas are changed by a combination of communication sources and that people can react to the same message in different ways.

- Science attempts to provide more reliable answers than those provided by other generally used ways of knowing. To the extent that you can use the scientific method for decision making in public relations management, you can elevate the function from an intuitive, artistic enterprise and make it part of an organization's management system. In this approach, research is at the core of how the function is managed. Research is done to accomplish the following.
 - Define the problem or situation for the purpose of developing a public relations program.
 - Monitor program implementation for performance accountability and for strategic adjustments.
 - Measure program impact or effectiveness with respect to goals and objectives.

Research adds a layer of complexity to the practice of public relations.

Scientific Method Research Procedures

The scientific method of research can provide an objective, unbiased evaluation of data. To investigate research questions and hypotheses systematically, both academic and practitioner researchers should use these steps.

1. Select a problem.
2. Review existing research and theory (when relevant).
3. Develop hypotheses or research questions.
4. Determine an appropriate methodology/research design.
5. Collect relevant data.
6. Analyze and interpret the results.
7. Present the results in appropriate form.
8. Replicate the study (when necessary).

Courtesy of Henry Milam, Ph.D., APR.

Additional Resources

Lindenmann, W. K. (2001). *Research doesn't have to put you in the poorhouse*. Institute for Public Relations. Retrieved June 18, 2010, from http://www.instituteforpr.org/ipr_info/research_in_poorhouse

Newsom, D., & Haynes, J. (2011). *Public relations writing: Form & style* (9th ed.) Boston, MA: Wadsworth, Cengage Learning.

Diversity

Recognizing the role of culture and diversity in public relations programming means understanding the importance of values, attitudes and beliefs of the various publics an organization serves. For example, in the health arena, culture is directly related to the effectiveness of health promotion, disease prevention and management, early detection, access to health care, trust and compliance (Satcher & Pamies, 2005). Public relations professionals, once equipped with culturally proficient communication models, messages and tools, can influence an organization's publics by addressing the unique needs of each public. Other public relations experts agree that "understanding the internal communication of any organization requires analysis of the culture of that organization" (Broom, 2009, EPR, p. 215).

In the business world and its strategic management approaches, diversity goes beyond communication strategies. Encouraging understanding and acceptance of people from diverse backgrounds within an organization's employees, services or products is at the core of many companies' cultures. Affirmative action, valuing diversity and managing diversity focus the business case for diversity. Managing diversity moves beyond affirmative action and valuing differences, and is achieved when a business recognizes the strengths of its diverse publics and employees and chooses strategies based on these strengths and perspectives. (Fiske, 2004) For more information, Fiske et al provide a comprehensive diversity tool kit for public relations professionals. PRSA members can access the tool kit by visiting <http://www.prsa.org/diversity/chaptersection.html>. Candidates from other participating organizations should visit their group's website to find out about its diversity policies and programming recommendations.

Satcher, D., and Pamies, R. (2006). *Multicultural medicine and health disparities* (6th ed.). New York: McGraw-Hill.

➔ Exercise: Practicing diversity

Today, many global companies have developed statements attesting to their firm commitment to diversity. Think about the following statements, and for each, provide three practical programs you would advise senior management to implement in order to turn policy into practice.

Excerpts from UPS Diversity Statements

"UPS understands that diversity encompasses more than ethnicity, gender and age. It's how employees think, the ideas they contribute, and their general attitude toward work and life.

Diversity is encouraged by recognizing the value of people's different experiences, backgrounds and perspectives. Diversity is a valuable, core component of UPS because it brings a wider range of resources, skills and ideas to the business.

UPS understands that customer diversity requires understanding the differences in cultural backgrounds and the unique needs of each customer."

Identify practical steps to turn policy into practice by listing below.

- 1.
- 2.
- 3.
- 3.

Excerpts from The Home Depot

“Diversity is the catalyst for innovative thinking, entrepreneurial spirit and new ways of building our communities. The greater the diversity of our people, the greater our ability to serve our customers. At The Home Depot, we firmly believe that talent comes in many forms, and we celebrate each and every one of them. It is talent above all else that is cultivated, nourished and is considered to be the foundation of our culture.”

Identify practical steps to turn policy into practice by listing below.

- 1.
- 2.
- 3.

➔Exercise: Who’s Keeping Time: Communicating with Cultural Competency

Consider the following example to determine the best approaches to maintain respect, sensitivity and cultural understanding.

Your client is developing a public education campaign to help Latina adolescents adopt safe driving methods. After polling to find out the most convenient time for a group of volunteers, you scheduled a series of three focus group meetings for 20 teenaged girls for the next three Wednesdays at 7 p.m. On the first Wednesday, you and the facilitator arrive at 6 p.m. to set up for the meeting. The first teen arrives at 7:05 p.m. and finally, by 7:25, all but one girl have arrived so you begin the session. You feel frustrated and have been pacing the floor, waiting for your focus-group members. Indeed, your time is precious and you are also aware that the young girls have to return home no later than 8:30 p.m. You’re not sure how you will be able to achieve results in the now-limited time.

Describe how you would initiate a dialogue with the group to ask for punctuality.

Definitions

Attitude: An inclination, often unconscious, to behave in a given way as a result of a spectrum of information, values, beliefs, experiences and persuasive messages. An attitude is a person's evaluation of an object, situation or issue. Attitudes drive behavior. Once attitudes are influenced, new behaviors will follow.

Audience segmentation: The breakdown of an audience into demographic, psychographic or other dimensions in order to adapt strategies, tactics and messages to audience need or interest.

Baseline data: Data collected before or at the beginning of a project or program. The data will be compared to data collected during and after program implementation in order to assess program effectiveness.

Benchmarking: Comparison of one's products and services to those of competitors or those recognized as the "best in the industry" to identify standards for improvement or superior performance. Sometimes the term is used to signify milestones or progress achieved during the life of a project.

Communications audit: A complete analysis of an organization's communications processes, both internal and external. The audit is designed to reveal how an organization wants to be perceived by designated publics, what it is doing to foster that perception and how it is actually perceived.

Content analysis: A study of publications, print and electronic media reports, speeches and letters to measure, codify, analyze and/or evaluate the coverage of an organization, its people and its activities. In a strict sense, content analysis uses a rigorous, statistical methodology. But in many cases, it is less formally structured.

Descriptive research: Collecting information that describes existing conditions, the status quo of individuals, group opinions, attitude or behavior. Usually designed to test a theory or hypothesis.

Evaluation research: Process of evaluating concepts, design, plan, implementation and effectiveness of a program. Used to learn what happened and why it happened.

Formal research: Uses principles of scientific investigation such as the rules of empirical observation, random sampling in surveys, comparison of results against statistical standards, in order to replicate results. If done correctly, allows accurate statements about publics based on evidence drawn from scientifically representative samples. Clear objectives and purpose are a must.

Formative research: Gathering information for use in making decisions prior to a program or making adjustments in a program/plan during implementation.

Gantt chart: A bar chart that shows the visual and linear direction of project tasks useful for tracking deadlines and monitoring a project's progress, as well as for planning and scheduling tasks. It visually lays out the order in which tasks will be carried out. It can identify resources needed for each task. It always shows a start and finish date and may identify team-member responsibilities.

Goal: Statement that spells out the overall outcomes of a program, usually a more specific expression of a mission or purpose that is directly related to the problem or opportunity at hand. Often related to one aspect of the mission or purpose. Commonly described as the desired outcome of a communication plan.

Examples: To increase public use of mass transit. To introduce people in developing countries to multi-yield agricultural practices.

Historical research: Collecting information that exists on the record, including historic documents, personal papers, journals, official records, etc.

Informal or nonscientific research: Can look at values or qualities; subjective. Good for pre-testing formal strategies; exploratory. Findings cannot be projected to represent an entire audience or population. Provides an early warning signal and often used to inform formal scientific research.

Examples: Personal interviews, community forums, call-in phone lines, field reports.

Mission or mission statement: The overarching reason why an organization came into existence; a visionary statement that can guide an organization's purpose and planning for many years.

Examples: To bring affordable transportation to the common person. To end world hunger.

Objective: The key result that must be achieved with each public to reach the program goal. Specific milestones that measure progress toward achievement of a goal. Objectives must do the following.

1. Address desired result in terms of opinion change and/or behavioral outcome, not in terms of communication output.
2. Designate the public or publics among whom the behavioral outcome is to occur.
3. Specify the expected level of accomplishment.
4. Identify the time frame for these accomplishments to occur.

Examples:

- To increase ridership of public transportation in the Los Angeles metropolitan area [behavioral outcome] by 8 percent [level] among workers earning less than \$25,000 per year [public] within the first six months [time frame] of the communication program.
- For at least 10 percent [level] of a randomly selected sample of public transportation riders in the Los Angeles metropolitan area [public] to identify as their reason for using public transportation one of the communication tactics employed in your public relations campaign [behavioral outcome] by the end of the second year of that campaign [time frame].
- To have confirmed reports that 50 percent [level] of the natives of one Asian, one African and one South American developing country [public(s)] are applying multi-yield agricultural practices [behavioral outcome] by 2010 [time frame].

Omnibus survey or study: A less expensive quantitative research method that involves piggybacking some questions on a research company's poll. Also called subscription studies. National studies made up of clusters of questions proprietary to particular clients.

Opinion: An expression of an attitude. Public opinion is the composite of all the people who make up a public.

Outcomes: Measurable result of change in action, attitude, awareness, behavior, opinion, support.

Outputs: Measure of tools, tactics or activities supporting a plan or project.

Example: Number of news releases, media reports, number of trade shows attended, etc.

Population: Individuals whose opinions are sought in a survey. The population can be as broad as every adult in the United States or as focused as liberal Democrats who live in the Fifth Ward of Chicago and voted in the last election. The sample is drawn to reflect the population, which is sometimes called the universe.

Positioning: The process of managing how an organization distinguishes itself with a unique meaning in the mind of its publics – that is, how it wants to be seen and known among its publics, especially as distinguished from its competitors.

Primary research: Investigation or data collecting first-hand; or by a third party contracted specifically for the firsthand party. Research you do yourself.

Problem statement: A brief summary of the problem written in present tense, describing the situation. The statement typically answers these specific questions, as presented in Broom.

1. What is the source of concern?

2. Where is it a problem?
3. When is it a problem?
4. Who does it involve or affect?
5. How are they involved or affected?
6. Why is this a concern to the organization and its publics? (2009, EPR, p. 274)

Proportional sampling: A method used to ensure that a survey sample contains representatives of each subset in the population being studied, according to the proportion of their representation in the universe.

Example: If 53 percent of a certain population were women, a proportional sample would contain 53 percent women.

Publics: People or groups of people who are mutually involved or interdependent with an organization.

Qualitative research: Research that is somewhat subjective, using a problem or open-ended, free-response format to investigate the value of programs or probe other questions, usually informal. Descriptive; not measurable; looks at how and why; also known as exploratory research. Yields an in-depth understanding of an issue.

Example: Focus groups

Quantitative research: Research that can be numerically stated or compared; may use statistical standards; highly objective and projectable; uses closed-end or forced-choice questions. Factual, numerical, mostly one-way questions with short responses that have precise and conclusive outcomes.

Random sample: Each person in a large group has an equal chance of being chosen.

Reliability: The extent to which a survey, test or measuring procedure yields the same results on repeated trials.

Research: Systematic gathering of information for the purpose of describing and understanding situations, and checking out assumptions about public and public relations consequences. It helps define the problem.

Respondent: In polling, a person who participates in a survey or poll by answering questions.

Risk assessment: In crisis public relations planning, the determination of the chance of various occurrences in order to take steps to handle such incidents in the order of their probability. Related to the larger function of Risk Management that uses the outcome of risk assessment to plan and execute strategies to deal with such risks.

Risk management: The process of measuring, or assessing risk and developing strategies to manage it. See Risk Assessment.

Sample: A portion of a larger whole; in polling, a relatively small group of individuals selected to represent a population, usually by means of random probability sampling techniques which allows for the calculation of the exact probability of such representation.

Scientific method: Principles and procedures for the systematic pursuit of data through replicable observation and experiment, and the formulation and testing of hypotheses, comparison against standards and provisions for replication; objective; empirical; predictive.

Secondary research: Uses research findings of others, or collects information secondhand. Examination of research previously conducted by others.

Examples: National or regional studies, studies by trade associations used by members in the industry, etc.

Situational analysis: Information pulled together to define a situation (e.g., history, factors affecting a situation, people involved, etc). Contains all information needed to write a problem statement.

Stakeholder: Sometimes used to refer to investors, but includes others who have invested time, job seniority, commitment to the organization or are otherwise dependent on an organization in a sense other than financial. A person or group with a stake or interest. One who is affected by an organization.

Strategy: Overall game plan. The overall concept, approach or general plan for the program designed to achieve the objectives. General, well-thought-out tactical plans flow from strategy. Strategies do not indicate specific actions to achieve objectives. There can be multiple strategies for each objective.

Examples: Demonstrate that riding public transportation to work is an attractive alternative to driving. Choose communication vehicles that can be understood by a population with limited education.

Strategic thinking: Involves predicting or establishing a desired future state; formulating a strategy for achieving the desired state.

Summative research: Gathering information as a way of monitoring a program to document the effectiveness of the whole program or its parts.

Tactics/tools: The exact tools and activities used at the operational level. The actual events, media and methods used to implement the strategy. Specific activities conducted to implement strategies of a public relations program. Tactics/tools involve use of selected personnel, time, cost and other organizational resources. Tactics achieve the objectives and, in turn, support the goals that have been set to carry out the mission or purpose of the organization.

Examples: Design, produce and distribute radio, television and print public service announcements. Conduct a “Why I’d rather be riding” essay contest.

Trend Analysis: Tracking and analysis of trends in the media, marketplace, and overall environment in order to prepare and respond as changes occur.

Validity: Refers to the degree to which a research study accurately assesses what the researcher set out to measure. Researchers assess external and internal validity. External validity refers to the extent to which results of the study can be transferred to other settings or groups. Internal validity assesses the study’s methodology and alternative explanations for study results.

Example of external validity: A study found that three messages were effective in educating members of the Pima Indian tribe about diabetes self-care steps. External validity checks would assess if the same messages were appropriate for members of another tribe or ethnic population.

Example of internal validity: Researchers surveyed a group of high school students to determine where and how they receive messages on college education. Each question on the survey was determined to be reliable; however, in reviewing responses, the researchers found that many of the surveys from three classrooms had incomplete responses for the last questions. To ensure that the answers are validly computed and compared among classrooms, researchers determined the percentage affected by this “item missingness” and applied the same percentage to responses from the remaining classrooms.

Crisis Communication Management

Crisis Communication Management questions account for 5 percent of the Beta Examination.

Anticipating a crisis is part of every public relations professional's job. To that end, every organization should have an up-to-date crisis communication plan in the hands of a clearly identified and prepared crisis communication team—internal public relations staff, management representatives and outside public relations counsel where appropriate. This plan should be aligned to your company's operations crisis plan.

The Team

- Assign specific roles to team members, such as designating one person to speak to external publics and another to keep internal publics fully informed.
- Rehearse the crisis management team regularly.
- Train and retrain the spokespersons, emphasizing the need for them to work with others involved, including officials and agencies, and to communicate so the organization will be seen as speaking with one voice.

The Plan

- Monitor your environment regularly and identify your organization's vulnerabilities. Assess these vulnerabilities. Continuously seek ways to mitigate these vulnerabilities before they become crises.
- Develop a series of scenarios that reflect the crises your organization may face. Prioritize your organization's vulnerabilities by identifying those that would be most urgent.
- Pay particular attention to the worst cases.
- Evaluate realistically the probability that the worst case will happen.
- Review current policies and strategies that may be impacted.
- Review key messages you will want to impart in response to possible scenarios. Draft Q&A for response to these possible crisis scenarios.

Keep it Current

- Review the entire plan at least annually; a quarterly review is better.
- Be sure that members of the crisis management team have copies of the current plan and can access them immediately.
- Put the crisis plan on your intranet, with password protection.

Crisis Event

- Activate the crisis plan immediately. An organization's reputation often stands or falls based on how it handles a crisis during those critical first 24 hours following a crisis.

When a crisis occurs, the first step is to determine *what kind of crisis*.

- There are two main categories based on consequences—**violent** or **nonviolent**.
- Violent crises involve a cataclysmic loss of life and/or property.
- Nonviolent crises are often financial, but not always.
- Some crises are on-going, lasting for months or even years.

Define the crisis in terms of the **triggering event**—the cause—if known. Craft a timely statement that is accurate yet flexible enough to be refined as details about the crisis emerge. If your team is well prepared,

day-to-day business can continue while the crisis gets needed attention from the designated crisis team. Only designated spokespersons should officially speak for the company as incident details become available.

Identify **priority publics**. These may change with the type of crisis while others will remain constant, such as employees, customers, shareholders, suppliers, the neighbors, larger community, media, regulatory agencies, government, etc.

- Inform employees and your internal audience first. Post the message on your organization's intranet, hold staff meetings, distribute updated information at regular intervals, etc.
- Demonstrate concern and communicate what the organization is doing or planning to do to solve the problem.
- Anyone who works for the organization is likely to become a source, whether intentionally or not. Often neighbors, suppliers, customers and even the media (if not kept informed through official channels) will turn to employees for information. Be sure to caution employees against becoming spokespeople, even inadvertently, and remind them to route any media contacts to your media relations department.
- Keep employees informed so they don't resort to speculation that generates rumors.
- Rumors can sometimes create more damage than the initial crisis.

Have someone on call 24-hours-a-day during the most intense hours or days of the crisis.

The crisis message also needs to go on the organization's website: a statement and supporting facts as they become known. Organizations often set up "dark" websites, activated exclusively for crisis communication.

As the Crisis Unfolds

Strive for a timely, consistent and candid flow of accurate information to both internal and external publics to allay fears and stifle rumors. The organization should continue to function as normally as possible, leaving it to the crisis management team to contend with the crisis.

- Make adjustments to policies and strategies as needed to arrest the crisis.
- Seek public support as needed.
- Make changes in policies and strategies as needed to speed recovery from the effects of the crisis.
- Seek to re-establish the operation of the organization to the level it had before the crisis, or even better, as soon as possible.
- Set clear expectations and timelines for updates. Stick to them, even if the update is that there is no change.

Evaluation

Learn from the crisis experience. After it's over, reconvene the crisis management team to evaluate. Review the crisis' causes, the organization's responses to it and the outcomes. If necessary, make changes to the structure of the organization. If the organization has a history of an open-management style, such changes are likely to be slight.

And finally, **update the crisis management/communication plan** in light of this most recent experience.

Adapted from a presentation by Dr. Doug Newsom, APR, Fellow PRSA, and Jim Haynes, APR, Fellow PRSA.

Types of Crises

Planning for potential crises depends on the art of forecasting and defining possible future states, Broom suggests. Practitioners should anticipate warning signs for potential crises based on research. It's important that practitioners determine the potential types of crises as well because response depends in part on the type and duration of the crisis.

Crises may also be categorized into different types, such as **immediate, emerging, and sustained**.

- **Immediate crises** are often of the natural disaster or major emergency type, such as earthquakes, fires, crimes, or accidents. There is often little opportunity for specific research and planning. However, a general plan can often be in place and implemented to effectively reduce damage and enhance the situation.
- **Emerging crises** are those that allow more time for analysis and specific planning. These may include employee dissatisfaction, opposition by various groups, budget reductions, or customer migration from a company. Often these situations can be anticipated and minimized at early stages. Public relations leaders should inform other managers of situations that are not at the full crisis stage yet, but if left untreated could become major problems.
- **Sustained crises** involve situations that won't go away and may linger for years. Dealing with rumors is a prime example. Especially in today's archived society, an organizational rumor (even if untrue) is virtually impossible to erase from the news outlet databases and other locations searchable through the Internet. Again, the best solution for these negative situations is to stop them early whenever possible.

Major mistakes made by public relations practitioners and other leaders related to crises include waiting too long to respond, hiding from various audiences, attacking involved publics, and entering into unfavorable litigation. Major goals for most crisis situations are to minimize the problems as soon as possible and remove the event from the minds of affected audiences (Broom, 2009, EPR, pp. 313-314.)

More Crisis Tips

Broom also suggests that preparations address key steps outlined below by Crisis Management Expert Jim Lukaszewski.

1. Identify what can go wrong and become highly visible.
2. Assign priorities on which vulnerabilities are most urgent.
3. Draft questions, answers and resolutions for potential scenarios.
4. Focus on what to do and say during the first critical hours of a crisis.
5. Develop a strategy to contain and counteract, not react and respond (Broom, 2009, EPR, pp. 314-315).

Seitel (2011) reports that being prepared is the key to effective crisis management. Seitel cites four paramount issues to consider in crisis planning.

- Define the risk for each potentially impacted audience or public.
- Describe the actions that will mitigate each risk defined.
- Identify the cause of the risk; and
- Demonstrate responsible management action.

Seitel also writes that the most effective crisis communicators provide prompt, frank and full information to the media as the crisis unfolds. He adds that keeping silent on crisis issues only angers the media and makes problems worse.

Additional Resources

Lukaszewski, J. E. (2010). The Lukaszewski Group Inc., Crisis Communication Management Specialists. Retrieved June 17, 2010, from <http://www.e911.com/index.htm> (From the Articles, Case Studies, Books & Speeches tab, articles and speeches are available for one-time download and individual use at no charge. Also, click on Executive Actions in addition to other areas of this helpful site.)

Newsom, D., & Haynes, J. (2011). *Public relations writing: Form & style* (9th ed.) Boston, MA: Wadsworth, Cengage Learning. (See chapter 20 on The Public Relations Planning Process.)

Seitel, F. (2011). *The practice of public relations* (11th ed.). Upper Saddle River, NJ: Prentice Hall.

Business Literacy

Business Literacy questions account for 10 percent of the computer-based Examination.

Business Literacy Scavenger Hunt

Business literacy permeates everything public relations professionals do—but it’s sometimes difficult to put into words exactly what constitutes business literacy. Moreover, many public relations positions do not offer enough opportunities to cultivate a wide acquaintance of business strategy, operation and management. That’s why it’s important to take the initiative to broaden your knowledge in this area. Even for those who practice in a specialized field, such as education or government public information, a higher level of business literacy will be valuable in dealing with constituencies and decision-makers in the community.

Definition of Business Literacy

Business literacy is the ability to use financial and business information as the basis for decisions that help an organization achieve success.

This means understanding exactly how various organizations make money—and what differentiates one organization from its competition. It includes knowing the legal, political and regulatory environment in which the organization operates—and trends in employee, customer, shareholder and community relations. You also should understand basic economic trends and how they affect different organizations. The direction of interest rates, for example, has a huge influence on many businesses.

Suggested Approach

This Scavenger Hunt is a tool to help you gather key data and begin to analyze an organization’s competitive position. Think of it in terms of identifying information that will help you become a more valuable resource to your organization’s senior leadership and more effectively use your public relations knowledge, skills and abilities to add value. Start with an organization or a client firm and a couple of key competitors. Then re-run the Scavenger Hunt for different organizations. For example, for a public relations agency, use the Scavenger Hunt to assess the agency’s competitive position in its market, and then begin to analyze a couple of their clients’ positions. This will give you the broadest grasp of different markets and completely different competitive landscapes.

You will need to do basic background research as well as talk with employees of your target organization to put together a complete picture. Please remember to exercise discretion; some information may be confidential, or there may be areas that employees of other organizations are not comfortable discussing.

Although not every question that follows applies to every organization or situation, most of the information is relevant. Try to answer each question thoroughly, and think through the implications of what you learn during this exercise. Some helpful resources, including a brief overview of [SEC Filings and Forms](#), can be found at the end of the Scavenger Hunt.

→ Exercise: Basic Scavenger Hunt

Here are some basics to help you start thinking about the nature of your organization or client and the competitive landscape.

1. How does your organization make money—the money on which you operate?

2. Who decides how you will spend your organization’s money?

3. What drives growth for your organization?

4. What and/or who could put you out of business?

5. Who are your target audiences for products or services?

6. Who is your competition?

7. What motivates your organization to improve?

8. Who gets promoted in your organization—what characteristics, what skills, what backgrounds?

9. What values are important in your organization?

10. Which regulatory agencies affect your organization—list two or three—and how?

11. What is the biggest threat to your organization right now?

12. What is your organization's key competitive advantage?

13. Briefly, how are you organized in terms of who reports to whom, who supervises whom, who is responsible for transmitting information from level to level, up or down or sideways? Where does public relations fit into the organization?

14. What are the key ethical issues for your organization/industry at the current time?

➔Exercise: Advanced scavenger hunt

The following questions go into even more detail about your organization's competitive strategy and financials. Some of these questions are more relevant to a publicly traded corporation, but again, professionals working in not-for-profit, education or government will discover some key insights if they try to think through how these questions apply to their organizations and to others whose approval, cooperation or collaboration is desirable or necessary.

1. Which major economic factors most impact your industry? Some important economic factors to consider include short-term and long-term interest rates, inflation, trade policies, unemployment levels, consumer spending, business investment, tax rates and currency exchange rates.

2. What are some key metrics in your industry? Examples might include the number of student applications for educational institutions, number of members for member-based organizations, number of clients for professional services firms, assets under management for financial firms, same-store sales or inventory turn-over for retailers, or number of drugs on patent or in the pipeline for pharmaceutical companies.

3. Who is your peer group, against which the success of your organization is based?

4. What were your organization's revenues for the last fiscal year? What were they in the two previous fiscal years? What does the trend line show (revenues growing, declining or staying the same)?

5. What was your organization's net profit for the last fiscal year? What was the net profit in the two previous fiscal years? What does the trend line show?

6. If your company is publicly traded, what is its current stock price? What was the growth rate over the past 12 months? What was the annualized growth rate over the past three years?

7. How do your organization's revenues, net profit and stock price compare to those of your peers and competitors?

8. If your organization is publicly traded, who are the sell-side analysts who cover your organization? What is their outlook for your organization in terms of stock price appreciation, ability to execute, etc.?

9. If your organization is publicly traded, who are the primary holders of your stock: company insiders, founding family members, employees, retail investors, institutional investors (such as mutual funds)? How has this changed over the past three years?

10. Who are your customers? Are your customers primarily local, regional, national or international?

11. How many employees does your organization have? Who are the key employee groups? Is part or all of your labor force unionized? What is the employee turnover rate?

12. How many locations does your organization operate? What processes are in place for communication between corporate headquarters and its other facilities and/or operations?
13. How visible is your organization in the local community (or any local community where your organization conducts business)?
14. Is your organization actively involved in community issues and events? Which ones and why?
15. Are your senior managers/employees actively involved in the community? Do they contribute money, sit on boards, volunteer their time to nonprofits? Do they build relationships across the community?
16. Is your organization involved in any disagreement with the community or your stakeholders (such as legal disputes, building leases or construction, labor strikes or contract negotiations, environmental impact issues, plant closings, etc.)?

Putting It All Together

Once you have answered the questions above, you'll want to analyze how successful the various organizations you studied have been at meeting key strategic goals. Does the data you collected support or contradict the choices the organization has made (as you know them—either from personal experience, from your informational interviews or from newspaper reports)? This involves thinking through the relationships between disparate bits of information—but this is also at the heart of putting business literacy to use to support your public relations planning.

Additional Broad Resources

Your daily reading probably already contains a great deal of information on the state of business in your industry, region or the world at-large. The single best source of business information is the *Wall Street Journal*; also ask your colleagues which publications they read regularly and why.

[The Bookshelf](#) developed by the UAB contains several texts that touch on the importance of business literacy. There are literally thousands of business books that can help explain various points of business strategy. If you enjoy autobiographies and memoirs, there are many books written by business executives such as Donald Trump, Jack Welch, Katherine Graham and others who will give you insight into their strategies.

As you already know, there is a lot of information available on the Web—although sometimes the information you find should be taken with a grain of salt. A few of the best general sites are listed below, and there are many more. Some of these sites may require subscriptions.

Business and Economic Information

www.finance.yahoo.com

www.dismal.com

www.marketwatch.com

www.hoovers.com

Compilation of Business Links

www.ceoexpress.com

Education Information

www.chronicle.com

www.case.org

Legal, Government and Regulatory Information

www.findlaw.com

www.firstgov.gov

www.statelocalgov.net

Not-for-Profit Information

www.philanthropy.com

www.asaenet.org

Business Laws and Regulations

Regulation Fair Disclosure, Regulation FD or Reg FD: Adopted in August 2000, Regulation Fair

Disclosure requires that all publicly traded companies disclose material information to all investors at the same time. Material, nonpublic information now must be disclosed to small investors at the same time that it is given to stock analysts, other securities market professional and large institutional investors. Regulation FD also opened quarterly analyst conference calls to small investors. Subscriber services such as www.Bestcalls.com/ provide a directory of conference calls, and several other companies offer webcasting technology and services that companies can use to allow all investors to listen in. For more information about Regulation Fair Disclosure, go to www.sec.gov/answers/regfd.htm.

Sarbanes Oxley: Sarbanes Oxley legislation covers corporate auditing accountability, responsibility and transparency. Provisions within this law affect how information is disclosed and, therefore, intersects with the practice of public relations. Public companies are required to evaluate and disclose the effectiveness of their internal financial reporting controls, accelerated insider trading reporting and blackout periods. Knowledge of what and when one's company must disclose is critical to executing public relations responsibilities.

Sections of the Securities Exchange Commission Laws Important to Public Relations Practice

The Securities Act of 1933 and the Security Exchange Act of 1934 were enacted following the 1929 stock market crash. These acts contain checks and balances for securities-related actions and remain in place today. The need for such legislation grew out of abuses in the securities industry—investors' and brokers' devious practices were destroying small investors. While these laws are complex, certain sections of these laws directly relate to public relations practice as discussed below.

Rule 5c of the Security Act of 1933 deals with the registration of securities and led to the embargo of publicity materials during a specific timeframe—frequently called **“gag period”**—because these materials could be construed as an effort to sell a new security. The gag period is in effect from the date a corporation officially registers its intent to offer a security, or to a date 90 days after the registration statement becomes effective. SEC rules demand that the only direct selling of the stock by the corporation take place through a registration statement and prospectus, both of which are first reviewed by the SEC. Corporations who use news releases, ads, etc. to sell their stock during this period risk their organization's reputation and lawsuits. No comments or written statements on future sales or earnings projections, predictions, estimates, or similar information can be given during this period. Note: The gag period should not be confused with a **blackout**. Several types of blackouts exist in contracts, policies and business activities. Two common types of blackouts public relations professionals should be aware of especially are those related to employee benefits and political campaigns. A common HR blackout is a temporary period in which access, often to retirement or investment funds, is limited or denied. Normally, a blackout is in place for about 60 days during which employees can't modify their retirement or investment plans because the plan is being restructured/alterd or undergoing some administrative change, such as a change in fund manager or financial institution. Notice must be given to employees in advance of a pending blackout. In addition, a blackout can refer to a political party's restriction on advertising for a set amount of time before an election.

The Security Exchange Act of 1934 mandates **disclosure**. While the actual legislation says little specifically about publicity, the regulations apply to how we practice public relations. The real aim is to level the playing field for all investors. The law requires filing specific information with the SEC to make it available to the public. The prospectus of a new security fulfills this requirement. A prospectus is a legal document that is written/checked by lawyers and must be complete, including potential negatives. The SEC laws don't specifically enforce or prompt timely disclosure—the rules of the stock exchanges do.

Investor and media relations professionals deal most directly with these laws. **Rule 10 b-5** of SEC 1934 concerns fraud in disclosure. An organization has the legal responsibility to ensure the information it releases

is both accurate and complete. This applies to all publications, including speeches, releases and all published materials.

Section 14 of the Act of 1934 covers solicitation of proxies in the timeframe between sending the official statement and holding the annual meeting where the proxy voting occurs. Since a specific number of proxies or attendees is required for a vote to be held, companies can use ads, news releases, speeches, etc. to secure the required proxies or attendees. However, the solicitation must be filed with the SEC no later than the date of use. The purpose of proxy rules is to prevent false and misleading statements from affecting shareholders' judgment. Any public utterance made during the proxy period could be construed as an additional solicitation of proxies. The public relations professional needs to monitor executive speeches, correspondence, etc. for potential solicitation and ensure filing with the SEC.

A **1963 SEC** study of the securities market further defined **insider trading, material information** and violations. Insider trading encourages timely disclosure of material information in a further attempt to level the playing field between small and large investors. The study showed concrete examples of how public relations professionals were using news media to disseminate false and misleading information or deliberately withholding information from news media. Material information generally is defined as any information that would cause a reasonable and prudent investor to buy or sell stock.

Anti-trust: Sherman/Clayton Act and Robinson Putnam Act make it illegal to engage in activity that ruins competition. Overselling wording in news releases announcing acquisitions and divestitures can be cited as violations.

Lobbying: Federal Lobbying Act (1913) states lobbyists must register with the clerk of the house or the secretary of the senate between the first and tenth day of each quarter. A lobbyist is required to file a report stating the amount of money he or she received during the previous quarter for lobbying activities. The lobbyist is also required to reveal names of publications in which he or she has had published an article or editorial on behalf of the person or organization for which he or she is lobbying. This does not apply to newspapers, etc. in the regular course of business. A violation is a misdemeanor resulting in a fine up to \$5,000 and imprisonment up to 12 months. Cases indicate that this act applies only if a person is aiding in the passage or defeat of legislation, which public relations professionals often do. Legal statutes vary by state.

Political contributions: Federal Corrupt Practices Act of 1925, Hatch Act of 1939 and the Taft-Hartley Act govern labor relations management and made it illegal for organizations, including unions, to make political contributions in connection with elections to any political office or for any candidate to receive such a contribution. But organizations and unions can form political action committees (PACs), which are legal because they're funded by employees, union members, etc., and, not the organization itself.

Registering as a foreign agent: Registration of Foreign Agents Act of 1938 requires public relations professionals who represent a foreign government to register with the US government. Anyone who acts in the US as an agent of a federal government without proper registration can suffer stiff penalty: fined up to \$5,000 and imprisonment for up to 10 years or both. They also must report under oath every six months the names of the foreign interests for whom they work, the activities they carry out, and where they get and how they spend their money. This law grew out of Fulbright hearings on Carl Byoir and Associates' representation of Nazis and changed how public relations is practiced. With the expansion of our world economy, the potential for involvement with a foreign government has increased dramatically.

Definitions

Listed below are some of the most common **benefits plans** used in various organizations. Public relations practitioners working directly with human resources professionals should understand these.

401(k) and 403(b) retirement plans: Voluntary retirement plans for employees of profit and public/not-for-profit organizations are known as 401(k) and 403(b) plans respectively. These employer-sponsored retirement plans allow a worker to elect to save for retirement while deferring income taxes on the saved money and earnings until withdrawal. Employees select from a number of investment options.

Cafeteria benefit plan: A cafeteria plan allows employees to choose from among different types of benefits. Cafeteria plans may include benefits such as health insurance, group-term life insurance and flexible spending accounts. Typically, these plans allow an employee to pay for these benefits through a salary reduction agreement, similar to a payroll deduction. Deductions under such agreements are often called pre-tax deductions; they are not subject to income tax, or in most cases, FICA.

Defined benefit plan: This retirement plan promises the employee a specific monthly benefit. The employee usually is not required to contribute to this plan in the private sector; however, in the public sector, employee contributions are required. Sometimes referred to as a fully-funded pension plan, the employee is not required to make investment decisions.

Defined contribution plan: This retirement plan creates an individual account for each employee. The benefit the employee receives is based on the amount contributed and affected by income, expenses, gains and losses. Two common types of defined contribution plans are the 401(k) and 403(b) plans.

Pension plan: Pension plans are forms of retirement plans that provide income after retirement or disability. Pensions can be created for employees by companies, not-for-profit organizations, labor unions, the government, etc. Other organizations also can fund pensions.

Roth retirement plan: Roth plans also allow you to save for retirement. If you meet certain criteria, you can invest on an after-tax basis and the earnings are tax-free when you withdraw them.

Public relations professionals should also understand the most **commonly used financial statements**. These are listed below.

Balance sheet: Compare the balance sheet to a photograph. The balance sheet shows a firm's assets, liabilities and equity at a given point. A firm's assets are listed in their order of liquidity, as are the firm's liabilities. The balance sheet always balances because assets must equal liabilities plus owner's equity.

Income statement: Compare the income statement to a video. It measures a firm's profitability over a period of time. The firm can choose the length of its reporting time period, such as a month, a quarter or a year. The income statement shows gross income, revenues, expenses and net income. It is important to recognize that an income statement includes both cash items, such as cash sales as income, and non-cash items, such as credit card sales as income, and depreciation as expense. An income statement is often called a profit/loss or P&L statement.

Statement of cash flow: This is the third major financial statement required of all publicly-traded corporations. Compare the statement of cash flow to a video. It shows how cash flows in and out of a company over a given period of time. This statement shows positive or negative cash flow in operating, investing and financing activity. For example, selling stock generates cash and is a positive cash flow.

Media Relations

Media Relations questions account for 15 percent of the computer-based Examination.

Media Relations is an integral part of most public relations programs. Public relations professionals interact with the media both proactively and reactively. The overall goal of good media relations is to establish relationships with representatives of the media that foster accurate, balanced, and timely release of your organization's information.

Whether dealing with a mass media outlet such as a network reporting global issues, or a specialized medium such as a trade journal concerned only with an industry segment, relationships are enhanced when public relations professionals first conduct research to become familiar with what specific media organizations cover. Receiving news that is unrelated to their audience profile only serves to diminish the media trust and respect that is so important to achieving coverage of stories.

Media relations campaigns should be planned in accordance with industry standards to target audiences with specific messages relevant to the overall goals of the public relations plan. The effectiveness of a media relations campaign should be evaluated regularly. Comprehensive metrics have been developed and implemented to evaluate a PR program. Though the amount of media coverage is only an output measure, it still remains among the top indicators valued by the client.

However, U.S. law allows media a right to refuse any story they do not wish to run, as set forth in The First Amendment. Therefore, professional practitioners must resist pressuring the media for coverage and understand that submitting a news release does not guarantee its publication. Observing this will go a long way toward building professional, ethical standards in your media relations (Broom, 2009, EPR). (See chapter 10 on External Media and Media Relations and chapter 16 on Government and Public Affairs.)

In keeping with the above, an important guideline for good media relations by practitioners is to give service and value to reporters. This includes providing newsworthy, timely stories of direct interest to their audience. Media databases such as Cision, Vocus and Factiva can provide information on what the outlets cover. They can help you discover or place an angle with the appropriate outlets and beats.

The news release is a mainstay of media relations. Public relations practitioners write the release and direct its approval process. This may include legal resources and the CEO, but varies according to the organization. It is important that the public relations representative knows and focuses upon the objectives of each communication piece as it relates to the overall plan. Distribution is now most often electronic through e-mail, wire services, websites, or similar methods.

Video News Releases (VNR) supply information, pictures and sound to TV journalists that can be used to illustrate your story. The VNR content must be completely accurate since it will air as submitted to the program producer and must clearly declare the sponsoring company, organization or individual. Observing a code of good practice for VNRs will help establish your recognition by the media as a trustworthy, reliable news source. VNRs should look like news and not advertising when submitted to news outlets (Broom, 2009, EPR, p. 247).

Seitel (2011, p. 189) notes that wire services continue to carry the most important news. He cites the Associated Press (AP), founded in 1848, as still one of the most important news organizations in the world. Also available are wire services such as PR Newswire, Business Wire and Market Wire, which charge a fee for distributing news releases.

Here are some questions to guide your understanding of sound media relations. Refer to the [Readings](#) section toward the front of this study guide for more detailed information on media relations programs.

Key Media Relations Knowledge and Skills

- Do you understand the relationships between public relations professionals and journalists?
- Can you relate current events and trends to your organization/clients? In other words, have you developed news sensibilities and solid news judgment?
- Do you recognize the strengths and weaknesses of different media types and select the one or ones that will be effective for different communications goals?
- Do you use the Internet and other new media technologies, including e-mail list serves, blogs, chats, RSS, and podcasts effectively?
- Do you understand how to work with the many information distribution systems?
- Have you learned to recognize the unique media relations laws, requirements and responsibilities associated with financial public relations for publicly owned companies?
- Do you train and coach others, including senior management, to prepare them for media interviews and interaction?

Vital Media for External Publics

- Newspapers
- Wire Services /News Syndicates
- Magazines
- Radio
- Television
- Company Web page
- Email
- Blogs
- Chat rooms
- Interactive networks
- VNRs
- Direct mailings
- Podcasts/videocasts
- Other

Important Relationships for Effective Media Relations

- Relations with news people (help them do their job well)
- Relations with production people (get them on your side)
- Relations with other PR people (shared responsibilities)
- Relations with freelance writers
- Understand the differences between purchased media (advertising) and earned media (editorial content)

Best Practices — When to Use and Not Use

- Protecting relationships: contacts and deadlines
- Direct contact: client or boss and news person
- E-mail
- News conferences: when appropriate and when not
- Media tours: print and broadcast
- Telephone

- More informal contact
- Proactive and responsive media relations efforts pertaining to financial public relations activities of publicly traded companies

Constant Preparation

- Keep background sheet handy.
- Maintain newsroom on website (company backgrounder, downloadable images).
- Prepare for interviews by following the steps below.
 - Know the facts.
 - Prepare for questions. Develop Q&A.
 - Plan for articulation of key messages.
 - Provide media training.
 - Select and train the right spokesperson.
 - Stick to the facts; never guess, never speculate; never lie.
 - Avoid “no comment,” even if you can’t comment.
 - Be confident, credible, personable.
 - Be on time.

Analyze Distribution Systems

- In your public relations plans complete the following measures.
 - State your overall goal.
 - Identify your objectives for each target audience.
 - Create strategies for meeting those objectives.
 - Identify the channels and technologies you will use to achieve your objectives for each target audience.
- Consider whether the news media contacts are an audience, a channel, or both?

Summary

- Learn as much as you can about the reporters and media that cover the different aspects of your organization; for example, education and local political writers if you work for a school, medical and business writers if you work for a healthcare institution, etc.
- Be informative and honest in every contact with the media.
- Always focus your efforts on the best channels (media) that can achieve your communication objectives.
- Work closely with other parts of your organization, including others in the public relations and/or communication department in preparation for media contacts to ensure that you have the most accurate and up-to-date information.

Tip: Think about what you will do as a public relations professional and how you work with the media. Refer to texts on the Short Bookshelf and take advantage of the many other resources for further developing your knowledge, skills and abilities in this area. Examples of other media relations resources include workshops and teleconferences, articles in public relations publications, and texts such as those listed throughout the Study Guide.

Courtesy of Minnesota PRSA Accreditation Committee.

Additional Resources

Newsom, D., & Haynes, J. (2011). *Public relations writing: Form & style* (9th ed.) Boston, MA: Wadsworth, Cengage Learning. (See chapters 4, 9, 10, 11, 12, 14 and 15.)

Seitel, F. (2011). *The practice of public relations* (11th ed.). Upper Saddle River, NJ: Prentice Hall. (See chapter 9 on Media Relations/Print and Broadcast.)

Using Information Technology Efficiently

Using Information Technology Efficiently questions account for 12 percent of the computer-based Examination.

Reliance on Electronic Media for News content

According to a March 2006 study by the Pew Internet and American Life Project, some 50 million Americans turned to the Internet for news on a typical day—a high-water mark for online news-gathering that coincides with rapid growth of broadband adoption in American homes. From 2002 to 2006, overall Internet penetration rose from 58 percent of all adult Americans to 70 percent, and home broadband penetration grew from 20 million people (or 10 percent of adult Americans) to 74 million people (37 percent of adult Americans).

Defined by the study as Internet users who completed four or more things online in a given day, “high-powered” broadband users comprise 40 percent of the entire population of home broadband users and 44 percent of all Internet users who get news on the typical day. They are better educated and have higher incomes than other Americans, and they are part of an information elite that shapes how delivery of news and information will evolve online. These high-powered users have the following characteristics.

- 71 percent of high-powered users get news online on the average day—three times the rate of other high-speed users.
- 59 percent get news on the average day from local TV.
- 53 percent get news on the typical day from radio.
- 52 percent get news on the average day from national TV newscasts.
- 43 percent get news on the average day from the local paper.
- 21 percent get news on the average day from a national newspaper.

For more information about this and other Pew Internet and American Life Project studies, visit www.pewInternet.org.

Information Technology Considerations

The development and enhancement of online communication opportunities have created a breed of “on-demand media” and led to a segment of the population that expects news to be individualized and tailored, not to mention fed effortlessly, regularly and instantaneously. This is requiring public relations professionals to consider how to implement online communication tactics—such as websites, RSS (Really Simple Syndications), news feeds, blogs, podcasts, videocasts and the like—that are not only informative, but also concise and free of news and information likely to be considered noise or minutia. Now, public relations professionals need to research and understand the various publics in an entirely different and detailed way, as well as to be versed on emerging electronic media trends.

The breadth and depth of search engine services offered by Google, Yahoo, MSN, AOL, ask.com and others, combined with online/social-networking communities like MySpace and Facebook, create a plethora of real-time news-gathering sources, as well as additional news-monitoring strains on public relations professionals. Gone are the days when keeping your organization’s own website was all you needed to do to command your market presence on the World Wide Web. Your own website is merely a stream feeding into the vast ocean of today’s online information. Monitoring external sites as both informal research and for input opportunity through blogs and chats creates a vast new challenge for the public relations professional.

The “news cycle” that used to have boundaries and schedules is now normally 24 hours a day for most news outlets and other direct media (such as websites, social media sites, blogs, and other media without a gatekeeper). Public relations practitioners always have needed to be available to various publics, but with electronic media systems constantly being updated the professional must be ready to provide appropriate

information at any time. While media contacts still are important, practitioners now also have the opportunity to directly contact and reply to any number of important publics on their own without media intervention. If the 6 p.m. local news doesn't cover a story, organizations can now use Twitter, Facebook, YouTube or other sites instead.

In addition, there is great convergence among the traditionally distinct media. For example, the vast majority of major media now have websites. Television stations obviously will have video on their sites, but they also will include still photos and text stories that would traditionally be in the newspaper focus area. Similarly, some newspapers now include video on their websites. The bottom line is that public relations managers should be able to provide various types of content to media and directly to other audiences through a variety of methods.

With the onset of high quality digital still cameras and video cameras that are easily affordable "the media" can now be almost anyone. This citizen journalist provides opportunities for public relations leaders and media to engage with various publics by having "outsiders" provide content to assist the organization. However, these technologies also provide almost anyone with the potentially negative capability of capturing audio, video, or still images at any time and then sharing with many others within a very short time. As the managers of communication for an organization, public relations professionals should constantly be reminding other colleagues of this media world. Many politicians and other leaders have been ruined in recent years over one joke or off-color comment caught by a "non-media" attendee at a party or other supposedly informal function.

Public relations professionals must have a lifelong learner mentality as technology uses are considered. Many professionals did not learn the software or other technology necessities of today while in school. Practitioners must be willing to continue learning and accept frequent training as part of their career plans. With continuing changes, practitioners must embrace new technologies as part of their overall public relations plans. They should also keep in mind that technologies should be used as tools and not just as the latest fad.

Although "virtually" all practitioners now use e-mail, the Internet, social media, and other technologies, the fundamental skills of writing and analysis must still be employed as different channels are chosen. The credibility of the practitioner and the organization are still on the line based on the content of the message and not just the channel (Broom, 2009, *EPR*, pp. 248-252).

Reputation management is a related growing field within public relations. Practitioners use electronic monitoring tools to scan the Internet for organizational references on blogs, websites, and social networking locations that could affect an organization's reputation. "Perception is reality" to many publics, and a potentially damaging Internet rumor can reach millions of people in seconds. Prompt and appropriate responses are essential. "Cyber crises" can be triggered by postings on the Internet or through similar electronic methods (such as e-mail), and often these can threaten reputation, credibility, and market position as quickly as a few strokes on a keyboard occur. The guidelines for crisis recommendations are as applicable to cyber crises as other types, with the added priority of urgency.

Definitions

Tip: For terms and definitions in addition to those that follow, please consult technology-focused textbooks and publications, or go online to <http://www.whatis.techtarget.com>, the source for a majority of these terms and definitions and one of many online technology resources.

Address: The unique location of [1] an Internet server, [2] a specific file (for example, a Web page), or [3] an e-mail user. It is also used to specify the location of data within computer storage.

Anonymous Web surfing: Visiting websites without allowing anyone to gather information about which sites the user visited. Services are available that provide anonymity, disable pop-up windows and cookies, and conceal the visitor's IP address, i.e., your e-mail address.

Audiocast: Audio content broadcasted over the Internet. The term serves as a broad descriptor for any audio content, including streaming audio, podcasts or other distribution methods.

Blog: Short for weblog; a personal online journal that is frequently updated and intended for general public consumption. Blogs are defined by their format: a series of entries posted to a single page in reverse-chronological order. Blogs generally represent the personality of the author or reflect the purpose of the website that hosts the blog.

Bookmark: A saved link to a Web page.

Breadcrumb trail: On a website, a navigation tool that allows a user to see where the current page is in relation to the website's hierarchy.

Cascading style sheet: Or CSS; determines how a given element is presented on a Web page. CSS gives more control over the appearance of a Web page to the page creator than to the browser designer or the viewer.

Channel: A group of items, each of which represents one post (i.e., a blog post or MP3 audio file). You subscribe to the channel when subscribing to podcasts. Channel is used interchangeably with feed on many websites; may also be referred to as a "feed."

Chat room: A Web-based venue for communities of users with a common interest to communicate in real time. Forums and discussion groups, in comparison, allow users to post messages but don't have the capacity for interactive messaging. Users can enter chat rooms and read messages without sending any—a practice known as lurking.

Chicklet: A term for the small, often orange buttons used as links to RSS files. Most podcatchers allow a user to "drag and drop" chicklets directly onto them to easily add a subscription.

Content management system: Or CMS; a system used to manage website content in lieu of commercially available code-based Web design software. The features of a CMS system vary, but most include Web-based publishing, format management, revision control, indexing, search and retrieval.

Cookie: Information a website puts on your hard disk so that it can remember something about you at a later time. Typically, a cookie records your preferences when you use a particular site.

Counter: On a website, a program that counts and typically displays how many people have visited an HTML page (usually the home page). Many sites include a counter, either as a matter of interest or to show that the site is popular.

Cybersquatting: According to the U.S. Anti-Cybersquatting Consumer Protection Act, cybersquatting is registering, trafficking in or using a domain name with bad-faith intent to profit from the goodwill of a trademark or celebrity belonging to someone else.

Digitization: The process of converting information into a digital format. In this format, information is organized into discrete units of data (called bits) that can be separately addressed (usually in multiple-bit groups called bytes). This is the binary data that computers and many devices with computing capacity (such as digital cameras and digital hearing aids) can process.

FAQ: A list of “frequently asked questions” (and answers) that has become a common feature of Internet sites.

File transfer protocol: Or FTP. A standard Internet protocol and the simplest way to exchange files between computers on the Internet. FTP is commonly used to transfer Web page files from creator to server. It is also commonly used to download programs and other files to your computer from other servers.

Item: A single entry in a news feed or podcast channel. Each item contains an enclosure that links to the audio file for the podcast, including ID3 tags.

Internet: A worldwide system of computer networks conceived by the Advanced Research Projects Agency (ARPA) of the U.S. government in 1969 and first known as the ARPANET. The original aim was to create a network allowing users of a research computer at one university to be able to “talk to” research computers at other universities. A side benefit of ARPANET’s design was enabling messages to be routed or rerouted in more than one direction so that the network could continue to function even if parts of it were destroyed in a military attack or other disaster.

Narrowcast: Audio or video programs targeting a specific audience demographic, as opposed to a broadcast. Many podcasts may be described as narrowcasts, although as the technology continues to be adopted, “mainstream” programming for wider audiences is being podcast as well.

News feed: A Web feed that specifically supplies new headlines or posts to an RSS aggregator. See RSS feed. A news feed may also be called a news channel.

Permission marketing: A marketing strategy using e-mail and other mobile technology to send consumers information that they have agreed in advance to receive. Opt-in e-mail, where Internet users agree in advance to receive information about certain product categories, is an example. Permission is a key provision of the 2003 Can Spam Act, <http://www.ftc.gov/bcp/online/pubs/buspubs/canspam/shtm>.

Phishing: An e-mail fraud method. A perpetrator sends a legitimate-looking e-mail in an attempt to gather personal and/or financial information from recipients. Typically, the messages appear to come from well-known and trustworthy (but “spoofed”) websites.

Ping: A basic Internet program that lets you verify that a particular IP address exists and can accept requests. The verb ping means the act of using the ping utility or command. Ping is used diagnostically to ensure that a host computer is actually operating

Podcast: An audio file published on the Internet with an RSS feed, allowing users to subscribe to automatic downloads of a series of such programs. Podcasts are a collection of files, audio MP3 files, for example, that are then included in an RSS 2.0 news feed as enclosures. Instead of headlines in a news feed, each item in a podcast RSS feed represents a single MP3 file.

Podcasting: The preparation and distribution of audio (and possibly other media) files for download to digital music or multimedia players such as the iPod.

Podcatcher: A software application that automatically checks for and downloads new podcast feeds.

Proxy server: An enterprise that uses the Internet to act as an intermediary between a workstation user and the Internet so that the enterprise can ensure security, administrative control and caching service. A proxy server is associated with or part of a gateway server that separates the enterprise network from the outside network and a firewall server that protects the enterprise network from outside intrusion.

Punchcast: A podcast that is sent directly to a smartphone or other mobile device without being sent to a laptop or desktop PC.

Push technology: A set of technologies whereby information is delivered from a central server to a client computer, often by means of an Internet-based content delivery network.

Redirection: On a website, a technique for moving visitors to a different page or site when its address has been changed and visitors are familiar with the old address.

RSSL: RDF Site Summary, formerly called Rich Site Summary or Really Simple Syndication; a method of describing news or other Web content that is available for “feeding” (distribution or syndication) from an online publisher to Web users.

RSS aggregator: A program used to collect and read RSS feeds. An RSS aggregator also may be known as a newsreader, news aggregator or RSS aggregator. Some readers exist as stand-alone programs and others operate as extensions of Web browsers or e-mail programs; still others are available online so feeds can be read independently of the computer used to collect them.

RSS feed: An XML file that provides content or summaries of content, including links to the full versions of the content and other metadata that a user can subscribe to using an RSS aggregator. Some sites may call this an RSS feed a channel.

Scraping: The process of someone creating an RSS feed from another website, as opposed to the individual’s own content.

Spam: Unsolicited e-mail. From the sender’s point-of-view, spam is a form of bulk mail, often sent to a list obtained from a spambot or to a list obtained by companies that specialize in creating e-mail distribution lists. To the receiver, it usually seems like junk e-mail.

Spool: To copy an RSS link into a podcast organizer or loader application to download later.

Spyware: Any technology that aids in gathering information about a person or organization without their knowledge. On the Internet (where it is sometimes called a spybot or tracking software), spyware is programming that is put in someone’s computer to secretly gather information about the user and relay it to advertisers or other interested parties. Spyware can get in a computer as a software virus or as the result of installing a new program.

Streaming media: Sound (audio) and pictures (video) transmitted on the Internet in a streaming or continuous fashion, using data packets. The most effective reception of streaming media requires some form of broadband technology such as cable modem or DSL.

Syndication: The supply of material for reuse and integration with other material, often through a paid service subscription. The most common example of syndication is newspapers where content such as wire-service news, comics, columns, horoscopes and crossword puzzles usually are syndicated content. Newspapers receive the content from the content providers, reformat it as required, integrate it with other copy, print it and publish it. For many years mainly a feature of print media, today content syndication is the way a great deal of information is disseminated across the Web.

Timeshifting: The process of recording and storing data for later viewing, listening or reading. In communications, the term timeshifting refers to the transmission of messages or data to be read, heard or viewed by the recipient at a later time. E-mail, voice mail and fax are common examples. Podcasting is a perfect example of timeshifting for radio programming.

URL: Uniform Resource Locator, previously Universal Resource Locator; the unique address for a file that is accessible on the Internet. A URL is a type of URI (Uniform Resource Identifier, formerly called Universal Resource Identifier.)

USM: Universal Subscription Mechanism, which allows certain podcasters to add a subscription automatically from an RSS file.

Uploading: The transmission of a file from one computer system to another, usually a larger computer system. From a network user's point-of-view, to upload a file is to send it to another computer that is set up to receive it.

Video podcasting: Similar to podcasting, except that video files instead of MP3s are published into RSS feeds; also called "vlogging" or "vodcasting."

Vlog: Video blog; a blog that contains video content. The small, but growing, segment of the blogosphere devoted to vlogs is sometimes referred to as the vlogosphere.

Web 2.0: A term for advanced Internet technology and applications, including blogs, wikis, RSS and bookmark sharing. The two major components of Web 2.0 are the technological advances enabled by Ajax and other new applications such as RSS and Eclipse and the user empowerment that they support.

Web accessibility: Standards ensuring that people with disabilities can use the Web. Web accessibility means that people with disabilities can perceive, understand, navigate and interact with the Web, and that they can contribute to the Web. Web accessibility also benefits others, including older people with changing abilities due to aging. Web accessibility encompasses all disabilities that affect access to the Web, including visual, auditory, physical, speech, cognitive and neurological disabilities.

Weblog: A website that consists of a series of entries arranged in reverse chronological order, often frequently updated with new information about particular topics. The information can be written by the site owner, gleaned from other websites or other sources or contributed by users.

Webinar: A type of Web conference or Web seminar that can be presented as an interactive dialogue between presenter and audience completely via the Internet, or a telephone-based presentation with complementing computer-based content. A webinar is "live" in the sense that information is conveyed according to an agenda, with a starting and ending time (Some are now available for viewing after as "pre-recorded," so to speak?)

Wiki: A server program that allows collaboration in forming the content of a website or other document via a website. With a wiki, any user can edit the site content, including other users' contributions, using a regular Web browser. Basically, a wiki website operates on a principle of collaborative trust. The term comes from the word "wikiwiki," which means "fast" in the Hawaiian language.

World Wide Web: All the resources and users on the Internet that are using the Hypertext Transfer Protocol (HTTP). The World Wide Web is the universe of network-accessible information, an embodiment of human knowledge.

XML: Extensible Markup Language; a flexible way to create common information formats and share both the format and the data on the World Wide Web, intranets and elsewhere.

Technology-related definitions are republished with the permission of WhatIs.com and TechTarget, Inc.

Online Resources

The Creative Commons is a nonprofit organization that offers flexible copyright licenses for creative works, including tools and guidance for artists and authors who wish to release some rights to their material under certain conditions while still maintaining copyright. www.creativecommons.org

The Media Center at the American Press Institute helps individuals and organizations worldwide acquire intelligence and apply insight into the future role and use of media and enabling technology. . www.mediacenter.org

The Pew Internet and American Life Project produces reports that explore the impact of the Internet on families, communities, work and home, daily life, education, health care, and civic and political life. The project aims to be an authoritative source on the evolution of the Internet through collection of data and analysis of real-world developments as they affect the virtual world. www.pewInternet.org

WhatIs.com is the premier Information Technology-specific Glossary on the Internet. Containing over 5,000 terms and definitions with thousands of acronyms, WhatIs.com offers business partners the ability to have their content on your corporate intranet or website . www.whatis.techtarget.com

History Highlights

History questions account for 6 percent of the computer-based Examination.

Eras of Public Relations

These key time periods are listed as described by Broom (2009, EPR, pp. 92-114). Also included are notable trends and figures during stages.

Seedbed Era (1900-1916)

- Organizational Attitudes: Public be informed. Muckraking, social reform, unions.
- PR Trend: Defensive publicity. Journalists hired as “interpreters” to get the news out.
- Key PR figures:
 - Ivy Lee, Jr.—Full disclosure and tell the truth
 - President Theodore Roosevelt—bully pulpit

World War I Period (1917 to 1918)

- Organizational Attitudes: Public be informed. The war to end all wars.
- PR Trend: Organized promotion. Promote patriotism. Use interest groups.
- Key PR figure:
 - George Creel—The Four Minutemen

Booming Twenties Era (1919 to 1929)

- Organizational Attitudes: Mutual understanding.
- PR Trend: Promoting products. WWI publicity techniques used for social science.
- Key PR figures:
 - Edward L. Bernays—*Crystallizing Public Opinion* (1923), *Propaganda* (1928)
 - Arthur Page—Performance = Reputation

Roosevelt Era and World War II (1930 to 1945)

- Organizational Attitudes: Mutual understanding. Depression. World War II.
- PR Trend: Mass media use. Social responsibility.
- Key PR figures:
 - Louis McHenry Howe—Responsible performance, persuasive publicity
 - Elmer Davis—Office of War Information
 - President Franklin D. Roosevelt—“Fireside Chats”

Post War Era (1946 to 1964)

- Organizational Attitudes: Mutual adjustment. Professionalism. Post-war service economy, consumerism.
- PR Trend: Credibility. Associations form, including PRSA. Code of Ethics written. Colleges establish curricula.
- TV importance.

Period of Protest and Empowerment (1965 to 1985)

- Organizational Attitudes: Mutual adjustment.
- PR Trend: Accommodation. Systems theory. Management by Objectives (MBO). Functional vs. functionary approach.
- Technology increasing.
- Key PR figures:
 - Marshall McLuhan—Understanding Media, “global village,” “the medium is the message.”

Digital Age and Globalism (1986 to present)

- Organizational Attitudes: Mutual adjustment.
- PR Trend: Constant technological connections. International relationships. Organizational transparency.

Comparison of Descriptive and Historical Aspects of Public Relations			
<u>Public Relations Models</u>	<u>Historical Periods</u>	<u>Organizational Attitudes</u>	<u>Example Practitioners</u>
Press Agency	Pre-Seedbed Era (pre-1900s)	Public-Be-Damned	P.T. Barnum
Public Information	Seedbed Era (1900-1916)	Public-Be-Informed	Ivy Lee
Two-way Asymmetric	World War I (1917-1918)		
	Booming Twenties (1919-1929)	Mutual Understanding	Edward Bernays and Arthur Page
	Roosevelt & WWII (1930-1945)		
Two-way Symmetric	Postwar Boom (1946-1964)	Mutual Adjustment	Arthur Page, Scott Cutlip and Allen Center
	Period of Protest and Empowerment (1965-1985)		
	Digital Age and Globalization (1986-Present)		

Notes: Public relations models as explained in Grunig & Hunt (1984). Historical periods as articulated in Broom (2009, EPR). Organizational attitudes as articulated by Edward Bernays and Arthur Page (cited in Broom, 2009, EPR). Example practitioners as identified in Broom (2009, EPR) and Grunig & Hunt (1984).

Acknowledgement: This chart is adapted from one that appears in Sha, B.-L. (2007). Dimensions of public relations: Moving beyond traditional public relations models. In S. Duhe (Ed.), *New media and public relations* (pp. 3-25). New York: Peter Lang.

Additional Resource

Grunig, J. E., & Hunt, T. (1984). *Managing public relations*. New York: CBS College Publishing.

Figures and Events in Public Relations History

Publicity Bureau: Nation's first publicity firm, forerunner to today's PR firm, used tools of fact-finding, publicity and personal contact to saturate media with railroad propaganda.

Samuel Adams: Organization—Sons of Liberty, Committees of Correspondence; Symbols—Liberty Tree; Slogans—Taxation without Representation; Staged events—Boston Tea Party.

Edward L. Bernays: Wrote *Crystallizing Public Opinion*, the first book on public relations (published in 1923), and coined the term public relations counsel with his wife Doris Fleischman. Taught the first course in public relations at New York University, and was the first to call himself a public relations professional. He said good public relations counsel recognizes changes in an organization's social setting and advises clients or employers how the organization should change to establish a "common meeting ground." Among the first to advocate licensure. Often referred to as the "father of public relations." (1920s)

George Creel: Chairman of the Committee on Public Information during World War I, and understood the power of publicity to mobilize the public. He started the "Four Minutemen" and created "spokespersons" from key interest groups such as lawyers, actors, journalists, teachers. Used persuasive tactics to dehumanize the enemy.

Elmer Davis: Director of the Office of War Information during World War II. Pioneered widespread use of radio, Hollywood and media to publicize the war effort.

Rex Harlow: Founded the American Counsel that ultimately became PRSA through mergers with other public relations organizations. (1947)

Louis McHenry Howe: Long-time public relations advisor to Franklin D. Roosevelt. Recognized that mutually beneficial public relationships could be built only by coupling responsible performance with persuasive publicity. (1936)

Amos Kendall: Key member of President Jackson's Kitchen Cabinet, he excelled at creating events to mold opinion. Pollster, counselor, ghostwriter and publicist. (1820s-30s)

Ivy Lee: Created a document termed by journalists as the "Declaration of Principles." Among the principles: to supply news and ensure the company's work is done in the open, provide accurate information and not advertising, and work with media to respond promptly to requests for additional information. Among the first to recognize that publicity needs to be supported by good works. Performance determines the publicity a client gets. Used testimonials, and advised clients to make full disclosure, tell the truth, and convince management to do the same. (1900s)

Arthur Page: An AT&T vice president who helped set the standard for corporate PR. Said a company's performance would be determined by its public reputation. (1927)

Theodore Roosevelt: First president to exploit news media as a new and powerful tool of presidential leadership.

Theodore N. Vail: Laid the public acceptance and public policy foundations for the nation's telephone system. Pioneered corporate public relations with AT&T. Understood the necessity for improving relationships between corporations and public. (1883)

George Westinghouse: Created the first corporate public relations department. (1889)

Additional Resource

Cutlip, S. M. (1994). *The unseen power: Public relations—a history*. Hillsdale, NJ: Lawrence Erlbaum Associates.

Case Study and Public Relations Plan Examples

➔ Case Study: Blue Ridge Water Company

Blue Ridge Opening New Plant, Needs Rate Increase

Situation

You are the Public Relations Director for a mid-sized water and wastewater utility in Northern Virginia called the Blue Ridge Water Company (Blue, for short). The company has been supplying Blue’s 200,000 residents with water and wastewater service for more than 45 years without issue. Prior to your joining the organization five years ago, Blue had no formal PR strategy—or strategist like you—in place. In terms of communication, the company was reactive, and issued information only when a particular situation necessitated it.

Your company, while public in nature, tries to operate more like a business. It has a strategic plan, a pay for performance appraisal system, and an “AA” financial rating. It is well managed and has strong record of fiscal and environmental stewardship. However, like many water utilities, you have operated under the radar for 45 years. You have done very little communicating about the company’s internal business structure and plan, however positive, and focused your very limited communications on customers, and only for issues related to water and sewer services.

Your customer demographic is a highly educated, affluent group. Median household income is one of the highest in the country at nearly \$96,000. Most customers have lived in your service area for less than five years, and because of growth in the Blue Ridge Region, your total number of customers doubles every ten years.

In one year, Blue will start operating an advanced wastewater treatment plant in the heart of your service area. It will be virtually odor-free and employ the best technology available to treat wastewater before returning it to the environment. In fact, the cleaned water will be available for sale for irrigation purposes. While Blue has financed the construction of the plant over the next 20 years, its day-to-day operations will be costly and will require a six percent increase in the user rates each year for at least the next three years, and possibly beyond. You have not issued a rate increase in the last 12 years. You have featured the new plant prominently on the website and frequently in the newsletter. The local weeklies also have covered it over the last year. Still, you do not believe that very many customers are aware of its arrival next year or the impending rate increase it will require.

Residents in your area are reeling from several years of increasing property-tax assessments. Housing affordability and rising public service costs are extremely hot topics. In addition, local elected officials have recently come under investigation for unethical dealings. Two local elected officials serve on your Board of Directors, as does a prominent local developer.

Use the following research findings to answer the questions that follow.

- A survey you conducted indicated that 90 percent of your customers think your services are tax supported (they are not—Blue is funded solely by water and sewer fees collected from customers). The survey also revealed that 51 percent of your customers cannot recall your company name unaided, let alone, anything about your company. The survey also revealed that 25 percent of your customers think trash service is among the services Blue provides. (It isn’t.)
- Your board of directors does not understand public relations in its truest form. They see it merely as a way to promote good things or cover up or spin the bad things.

- After ten years of unprecedented growth, construction has slowed down and the number of connections (hookups) is lower than projected, so cost control measures are in place for all internal departments until further notice.
- Blue is building a new headquarters next to the new plant. It will cost \$11 million and you will be moving in the same time next year that the plant starts operating. The building will employ many environmental and good neighbor features, such as geothermal energy, energy efficient lighting, motion sensors, low-water landscape and it will feature an outdoor park and trail where the public can come for fitness activities, walks and picnic lunches. The building will feature an indoor education center for community and school groups to book to learn about water science, treatment and conservation.

Questions

- **Step 1:** Describe what, if any, research is needed. Identify the source of the information and a rationale for each research activity that you recommend.
- **Step 2:** In one general sentence, state the problem(s) to be addressed.
- **Step 3:** Identify three key publics to be included in your plan and a rationale for including them.
- **Step 4:** Provide one short-term and one long-term objective for each public.
- **Step 5:** Provide one strategy for each objective, citing a theory or model as rationale for its use.

Courtesy of Samantha Villegas, APR, National Capital Chapter Accreditation Committee.

↑ Plan: Blue Ridge Water Company (First Steps)

Step 1: Describe what, if any, research is needed. Identify the source of the information and a rationale for each research activity that you recommend.

Topic of	Type or Source	Rationale
Research Rate Increase	Content analysis, and/or interviews with other utilities	See how rate increases by utilities have been reported by media to understand and anticipate what angles are typically used and/or what information proves to be confusing. Ask other utilities about lessons learned.
	Focus group, intercept interviews, or complaint reviews	Find out early reaction from customers/attitudes about rate increases, to know how to shape message
Wastewater Treatment Plant Site	Focus Group or Intercept Interviews	Find out early reaction from customers/attitudes about water and wastewater treatment plants to know how to shape message and find out what most worries them.

Step 2: In one general sentence, state the problem(s) to be addressed.

Blue suffers from poor or weak branding that will soon be magnified by the rate increase, typical negative perceptions and fears associated with operation of a wastewater treatment plant near residential areas, a beautiful new headquarters and the combination of the rate increase with the two new facilities.

Step 3: Identify three key publics to be included in your plan and a rationale for including them.

Publics	Rationale
Rate-paying customers	They will be affected by the rate increase.
Public school system (teachers and students)	Children are one of the most effective strategies for reaching parents with messages. Targeting them through the schools and teachers, with the indoor education center and the outdoor interpretive area will get messages out into the community about the WWTP technology and good neighbor provisions of the plant.
Blue Ridge neighbors (people who live near the new wastewater treatment plant)	It is imperative that those who are Blue's immediate neighbors get to know the company. If they understand and believe the brand that Blue has built and is living, then Blue will have a better shot at building understanding and support for the WWTP and its operation, as well as for the new headquarters building and rate increase

Step 4: Provide one short-term and one long-term objective for each public.

Public	Short-term objective (Less than 1 year)	Long-term objective (More than 1 year)
Rate-paying customers	Within one year, the percentage of rate paying customers who think Blue is tax-supported will be reduced from 90 percent to 65 percent.	In two years, more than half those surveyed will characterize the rate increase as necessary, warranted or adequately justified.
Teachers /students	At least 50 percent of the teachers and/or students in the local public school system will visit the new education center during the first month it's open.	In two years, more than half the students or parents of students surveyed will be able to name two of the good neighbor policies employed at the WWTP.
Neighbors	Within one year, 60 percent of the neighbors will support the WWTP (up from 51 percent), and be able to identify benefits of its operation.	In two years, the number of neighbors who will support the WWTP will be 85 percent (up from 60 percent), and those able to identify benefits of its operation will be 75 percent (up from 50 percent).

Step 5: Provide one strategy for each objective, citing a theory or model as rationale for its use.

Objective	Strategy	Rationale/theory
Rate-paying customers / Short-term Objective	Statement stuffer, advertising	You can cost-effectively reach customers with statement stuffers, and access reserve funds for targeted local advertising on cable and in homeowner association newsletters.
Rate-paying customers / Long-term Objective	Customers/face-to-face interaction via town hall meetings, participation in community events, etc.	A deeper more complex understanding of the organization will require a more intimate relationship based on getting to know the company and recognizing it as an important part of the community.
Teachers/students / Short-term Objective	Field trips and special events at new education center	We can reach thousands of students and their teachers by making full use of this facility. And we can send teachers away with a colorful packet of information about water and WWTPs.
Teachers/students / Long-term Objective	Return field trips and repeat special events at new education center,	Again, we can reach thousands of students and their teachers during visits to this

	providing opportunities for staff to establish one-on-one relationships with teachers and possibly, some students.	facility. Return visits will show that they like it and give staff the opportunity to build on relationships established during the first visits.
Neighbors / Short-term Objective	Community meetings, advertising, media relations	This will require a layered effort, creating opportunities for community meetings, participating in neighborhood events, working with local media and spending some money on cable or local newsprint ads.

Courtesy of Samantha Villegas, APR, National Capital Chapter Accreditation Committee.

→ Case Study: Healthtech Labs

Healthtech Labs Targeted by Animal Rights Activists

Create a communication plan for this case study using either a grid- or paragraph-style plan. Look at the situation, then, develop your plan, starting with the research element before you move on to the remaining three steps or look at the sample provided.

Situation

You are the Director of Public Relations for Healthtech Labs, a large chemical research company located in Gaithersburg, MD, a suburb of Washington, DC. Your privately held company has been in business for 21 years and has specialized in providing research and chemical analysis in a variety of areas. Virtually all of your work is based on contracts from federal and state agencies and on grants from foundations. The majority of your work involves developing sewage-treatment and water-purifications programs for applications in the United States and developing countries. Your researchers have been recognized frequently for their work in this area and the lab has a reputation for producing environmentally sound, socially aware solutions to problems. As PR Director, you have conducted an aggressive and successful campaign to generate publicity for the lab's research program. But, the company has kept one research program under wraps.

For the last 10 years, the lab has had a small contract to test Ragus-A, a new medicine that appears to reverse a genetically-based deficiency of the hormone insulin, which is the cause of diabetes mellitus, the well-known "sugar diabetes." To test Ragus-A, the lab has modified the genes of chimpanzees to cause them to lack the insulin hormone and pass that trait on to their offspring. The offspring are then treated with Ragus-A. The experiment involves regular injections of Ragus-A. The control group is not treated and exhibits symptoms of diabetes, including episodes of insulin shock under certain circumstances. As part of the test, mature monkeys are killed so the long-term effect of Ragus-A on the brain and other body parts can be determined. In 10 years, 30 monkeys have been used in the experiment and 10 have been killed for examination. The tests are scheduled to last another six months.

The Ragus-A experiments have not been publicized nor has the contract ever been announced. In fact, most Healthtech employees don't know about the program and there is virtually no public awareness of the Ragus-A contract.

You learn that ROAR (pROtectors of Animal Rights) has found out about the Ragus-A program and is planning to demonstrate outside the lab in just over a month. ROAR has been successful in generating media coverage of demonstrations at the National Institutes of Health and other private laboratories in the Washington area.

You are concerned about the negative publicity that could come from the protest—especially the impact of publicity on Healthtech employees, decision makers at federal and state agencies and foundations that support the vast majority of the lab's work.

You inform Dr. Alan Parker, President of Healthtech Labs and a distinguished researcher, of the planned demonstration. He asks you to develop a communication plan for what the lab should do.

Step 1: How will you go about the fact-finding and research in the limited time available? Outline in some detail the steps you would take and explain why you would take each step. Include in your answer responses for each question below.

- Whom do you want information from or about?
- What information do you want?
- What formal and informal research is needed?

Step 2: When Dr. Ralph Johnson, Director of the Ragus-A program, is informed of the planned protest, he suggests that the entire project – including all the monkeys and the four-person research team – be moved quickly to a small Healthtech facility in another state. The Lab could then deny the existence of the program, and stonewall the media and demonstrators until after another six months when the project can be concluded quietly. Dr. Parker asks you to consider Dr. Johnson’s suggestions as you continue to develop your action plan.

Develop a complete public relations plan for the four weeks prior to the demonstration and for the day of the demonstration itself. Be specific and include these eight elements as well as any other planning elements you think appropriate.

1. A response to Dr. Johnson’s suggestion, including a rationale for your position
2. Target publics
3. Long- and short-term objectives for the plan
4. Messages, strategies and tactics
5. Specifically, how to reach each public
6. Materials you will need and use
7. Spokesperson(s) to be used (including identification, selection and preparation)
8. Timetable

Step 3: Describe the media relations program you will use to implement the plan outlined above in detail and include the following.

- Targeted media
- Activities prior to the day of the demonstration
- Activities on the day of the demonstration
- Activities in the week following the demonstration

Step 4: Explain how you will evaluate your program.

↑ Plan: Healthtech Labs

(This plan was written by a candidate who is now an APR. *Notes* describe what she would do differently today.)

Step 1: Formal Research Needed

Research	Sources of information	Rationale
Survey	<p>Randomly selected sample of members of the medical community, including doctors and researchers</p> <p><i>Note:</i> This assumes that an accurate list (i.e., sampling frame) of members of the medical community is available. Without the sampling frame, it would be difficult to select a statistically valid random sample.</p>	<p>This method is useful for gaining information that can be generalized to the whole population of “members of the medical community.” I need this information to gauge potential support among “experts” for the Ragus-A program. The findings also may be cited in communications with target publics who find members of the medical community to be credible sources, given the context of the situation.</p>
Survey	<p>Randomly selected sample of employees of Healthtech Labs</p>	<p>This information is required to provide a benchmark of whether and to what extent employees know about the program. Although management thinks employees don’t know because they haven’t been told, this does not mean that employees didn’t hear whispers about the program through informal channels of communication. We need this baseline formation to evaluate the communication efforts later.</p>

Informal Research Needed

Research	Sources of information	Rationale
Interviews with influentials	<p>Dr. Johnson (Director of Ragus-A program); each of the four persons on the research team; the company president and other executive-level leaders</p>	<p>This method is useful for gaining better understanding of the details of the project (purpose, execution, preliminary findings, etc.). Interviewing also allows sources of information to express their opinions in their own words. I would use these findings to craft messages explaining the program.</p>
Interviews with influentials	<p>Key decision-makers for government regulatory agencies about animal testing in general</p>	<p>This method would help me gauge whether these individuals understand animal testing issues and benefits, as well as help me identify potential allies for the program.</p>

Research	Sources of information	Rationale
<p>Secondary analysis</p> <p><i>Note:</i> The proposed research may actually be “secondary research” where one looks at information both collected and analyzed by others. In contrast, “secondary analysis” occurs when you take information collected by others and analyze that raw data yourself. The original answer did not really address whether I would re-analyze raw data collected by others.</p>	<p>Study by the American Medical Association regarding prevalence of diabetes-related illnesses in the last three years</p>	<p>Although I would have to be careful about using research data collected by others (looking at who collected the data and how the questions were asked), this information would help me figure out the potential contributions of the Ragus-A project, which would help me construct messages for target publics using argumentation strategies such as logical explanations.</p>
	<p>Opinion polls conducted by other organizations on whether and what types of people support animal testing</p>	<p>See caveats above. This information would provide a baseline of what kinds of publics I might be dealing with, as well as the values and concerns of those publics. This information would help me prioritize my publics, as well as help me craft communication appeals to them, possibly based on altruism strategies (appealing to their sense of helping people who need this type of research).</p>
<p>Trend analysis</p>	<p>Major print and broadcast media stories from the past year.</p>	<p>This method helps me figure out whether the media have been covering this type of story. If they haven’t, I should be prepared for a possible onslaught and the need to educate journalists about animal testing in general. If they have, I can assess the angle of these stories and how they portrayed the companies. (If I had more time, I would conduct a content analysis of these print and broadcast stories, which would be formal research. However, since I’m short on time, I can only do an informal analysis of apparent trends in media coverage of animal testing issues.)</p>

Step 2: Identify Publics

The problem is that Healthtech Labs has been conducting animal testing “under wraps,” without sharing this information with important organizational publics who should have been informed, which means that the company will not be able to draw on key supporters in the event of a public protest of the program. We are looking at lack of awareness and, as a result, lack of support.

Note: Although not requested to do so in the instructions, I should have at this point articulated a goal statement for my campaign. Goal statements should be positive reiterations of the problem statement. One appropriate goal statement would be “to raise awareness and support of the Ragus-A program among members of the target public within the next two years.”

Five key publics include the following.

- Rank and file employees
- Federal and State agencies that can exert regulatory control over Healthtech Labs activities
- Doctors and medical researchers who support animal testing in general

- Members of the local community who support animal testing
- Members of the local community who aren't sure whether they support animal testing

Original Note: I am not targeting the protesters as a key public because they are unlikely to be willing to communicate with us in a two-way symmetrical manner, meaning that they are highly unlikely to listen to our point of view, preferring instead to insist on their own views. Thus, communicating with them is a waste of time since we are unlikely to prevent the protest anyway—just totally unrealistic, especially given the emotional nature of the animal testing issue. Instead, we can try to get on “our side” of the issue to those who are still in the middle or undecided, as well as to reinforce the sense of rightness among those who already support our position.

Objectives

Note: Short-term objectives center on knowledge outcomes, which necessarily precede the changes in attitude and behavior that are longer-term objective outcomes.

Publics	Short-term objectives (within this calendar year)	Long-term objectives (within the next two years)
Rank and file employees	<p>Increase to 100 percent employee awareness of the Ragus-A program.</p> <p>Increase to 100 percent employee knowledge of the purpose of the Ragus-A program.</p>	<p>Gain and maintain support of the program from 75 percent of employees.</p> <p>Maintain employee satisfaction levels with the company at 75 percent or above.</p>
Federal and State regulators that have jurisdiction over types of activities in which Healthtech Labs is engaged	<p>Increase to 100 percent regulators' awareness of the Ragus-A program.</p> <p>Increase to 100 percent regulators' knowledge of the purpose of the Ragus-A program.</p>	<p>Gain and maintain support of the program from 75 percent of regulators.</p>
Doctors and medical researchers who support animal testing in general	<p>Increase to 90 percent the proportion of pro-animal testing doctors and researchers who are aware of the Ragus-A program.</p> <p>Increase to 90 percent the proportion of pro-animal testing doctors and researchers who know the purpose of the Ragus-A program.</p>	<p>Gain and maintain support of the program from 90 percent of pro-animal testing doctors and researchers.</p> <p>Increase to and maintain at least 15 people as the number of pro-animal testing doctors and researchers who are willing to speak publicly in support of the program.</p>
Members of the local community who support animal testing	<p>Increase to 90 percent the proportion of pro-animal testing community members</p>	<p>Gain and maintain support of the program from 90 percent of pro-animal testing community members.</p>

Publics	Short-term objectives (within this calendar year)	Long-term objectives (within the next two years)
	<p>who are aware of the Ragus-A program.</p> <p>Increase to 90 percent the proportion of pro-animal testing community members who know the purpose the Ragus-A program.</p>	
Members of the local community who aren't sure whether they support animal testing	<p>Increase to 90 percent the proportion of "undecided" community members who are aware of the Ragus-A program.</p> <p>Increase to 90 percent the proportion of "undecided" community member who know the purpose of the Ragus-A program.</p>	Gain and maintain support of the program from 60 percent of currently "undecided" community members.

Strategies

Note: My original answers here did not adequately distinguish among the three types of strategies: (1) action strategies, which are internal changes the organization would have to make to achieve its objectives; (2) communication/ message delivery strategies, which are ways by which the messages would be delivered; and (3) communication/ message content strategies, which deal with the content of organizational messages.

Publics	Objectives (for specifics, see above)	Strategies
Rank and file employees	Increase employee awareness of the program and knowledge about its purpose.	Educate employees as to the purpose, goals, execution, preliminary findings, etc., of the project.
	Gain and maintain support of the program among employees.	Explain and justify the previous decision to keep employees from knowing about the program; highlight the benefits of the program.
	Maintain levels of employee satisfaction with the company.	Earn employee trust by apologizing for not informing them earlier, promising to keep them apprised of program developments and findings, and keeping that promise.
Federal and State regulators that have jurisdiction over types of activities in which Healthtech Labs is engaged	Increase regulators' awareness of the program and knowledge about its purpose.	Educate regulators as to the purpose, goals, execution, preliminary findings, etc., of the project.
	Gain and maintain support of the program among regulators.	Highlight the benefits of the program; explain and justify the previous decision to keep regulators from knowing about the program.

Publics	Objectives (for specifics, see above)	Strategies
Doctors and medical researchers who support animal testing in general	Increase among these doctors and medical researchers awareness of the program and knowledge about its purpose.	Educate these doctors and medical researchers as to the purpose, goals, execution, preliminary findings, etc., of the project.
	Gain and maintain support of the program among these doctors and medical researchers.	Highlight the benefits of the program; explain and justify the previous decision to keep regulators from knowing about the program.
	Increase to and maintain at least 15 doctors and researchers who are willing to speak publicly in support of the program.	Convince them of the importance of “expert witnesses” in the “court of public opinion;” convince them that supporting Healthtech Labs is in essence supporting the pro-animal testing cause in which they believe.
Members of the local community who support animal testing	Increase among these community members awareness of the program and knowledge about its purpose.	Educate these community members as to the purpose, goals, execution, preliminary findings, etc. of the project.
	Gain and maintain support of the program among these community members.	Highlight the benefits of the program; explain and justify the previous decision to keep regulators from knowing about the program.
Members of the local community who aren't sure whether they support animal testing	Increase among these community members awareness of the program and knowledge about its purpose.	Educate these community members as to the purpose, goals, execution, preliminary findings, etc., of the project.
	Gain and maintain support of the program among these community members.	Highlight the benefits of the program; explain and justify the previous decision to keep regulators from knowing about the program.

Step 3: Implementation

Note: The words in ALL CAPS below refer to the “seven Cs of communication” explained in EPR (Broom, 2009).

Publics	Strategy	Message	Tactics/tools	Spokesperson
Rank and file employees	Educate employees as to the purpose, goals, execution, preliminary findings, etc., of the program	Diabetes is a tough disease, and we must make tough choices to fight it.	Town meeting with all employees Write-up of the program in the next employee newsletter	Company president (because he is the most CREDIBLE and appropriate to this CONTEXT)
	Explain and justify the previous decision to keep employees from knowing about the program; highlight the benefits of the	Human diseases are tough enemies, and we must make tough choices in the war against them.	Town meeting with all employees	Company president

Publics	Strategy	Message	Tactics/tools	Spokesperson
	program.			
Federal and State regulators that have jurisdiction over types of activities in which Healthtech Labs is engaged	Increase regulators' awareness of the program and knowledge about its purpose.	Diabetes is a tough disease, and we must make tough choices to fight it.	In-person meetings with regulators Simple brochure about the program and its benefits	Company president (because he is the most CREDIBLE and appropriate to this CONTEXT)
	Gain and maintain support of the program among regulators.	Human diseases are tough enemies, and we must make tough choices in the war against them.	Simple brochure about the program and its benefits	Company president
Doctors and medical researchers who support animal testing in general	Increase among these doctors and medical researchers' awareness of the program and knowledge about its purpose.	Although diabetes is getting worse, Healthtech Labs is in the process of developing a cutting edge treatment.	Feature article about the program in professional association newsletters	Director of the program (because he is the most CREDIBLE and appropriate to this CONTEXT; also, he can articulate CLEARLY details of the program, in ways that fit the technical CAPABILITY of this public)
			Public relations advertisement in trade publication that promotes cutting-edge research of Healthtech Labs without mentioning	Company president (because he is the most CREDIBLE voice of the organization as a whole)
	Gain and maintain support of the program among these doctors and medical researchers.	Human diseases are tough enemies, and we must make tough choices in the war against them.	specific programs Exhibit booth at professional association meetings where program researchers can talk face-to-face with members of this public	Director of the program
	Increase to and maintain at least 15 doctors and researchers who are willing to speak publicly in support of the program.	Stand up to diabetes; stand up with Healthtech Labs.	Personal contact with potential spokespersons, possibly by phone initially	Director of the program

Publics	Strategy	Message	Tactics/tools	Spokesperson
Members of the local community who support animal testing	Increase awareness of the program and knowledge about its purpose.	Diabetes is a tough disease, and we must make tough choices to fight it.	Video news releases for local broadcast media	Company president Doctors and researchers who support animal testing.
			Advertising to put issue on public agenda	Member of the community who talks about how animal testing made possible the treatment that saved her loved one
(Doctors and researchers would be CREDIBLE spokespersons because of their expertise; also, they are opinion leaders for this public whose views are likely to be heeded, according to the two-step flow model of communication and Roper's concentric circles theory, both of which basically argue that opinion leaders are necessary filters of messages between senders and their desired receiver.)				
	Gain and maintain support of the program among these community members.	Human diseases are tough enemies, and we must make tough choices in the war against them.	Op-ed pieces for community paper and other local print media	Company president Doctors and researchers who support animal testing
Members of the local community who aren't sure whether they support animal testing	Increase among these community members awareness of the program and knowledge about its purpose.	Diabetes is a tough disease, and we must make tough choices to fight it.	Video news releases for local broadcast media	Doctors and researchers who support animal testing
			Advertising to put issue on public agenda	Member of the community who talks about how animal testing made possible the treatment that saved her loved one
	Gain and maintain support of the program among these community members.	Human diseases are tough enemies, and we must make tough choices in the ware against them.	Op-ed pieces for community paper and other local print media	Written by an employee, giving the "Average Joe" viewpoint (this makes the message CLEAR without jargon and accessible to a public with limited CAPABILITY to understand the complex nature of an unfamiliar issue

Budget

Tactic/tool	Details	Cost details	Cost
Town meeting with all employees	Refreshments	\$1 per attendee, 1,000 employees	\$1,000

Tactic/tool	Details	Cost details	Cost
Write-up of the program in next employee newsletter	Staff time spent writing article	\$20/hr equivalent staff salary; 5 hours to write and edit	\$100
Flyer that summarizes the program and its benefits to go to all employees with their next pay stubs	Write summary and other information; design flyer	\$20/hr equivalent staff salary; 15 hours to write, edit, and design	\$300
	Insert with paychecks	\$1 per manual insertion for 1,000 employee pay stubs	\$1,000
Personal meetings with regulators	Gas and mileage; and parking downtown	\$10 per meeting, for 10 meetings	\$100
	CEO time spent in meetings	\$500/hr equivalent salary for 10 1-hr meetings	\$5,000
	Staff time spent arranging meetings	\$20/hr equivalent staff salary; 2 hours	\$40
Simple brochure about the program and its benefits	Write summary and other information; design brochure	\$20/hr equivalent staff salary; 10 hours	\$200
	Printing of brochure	\$0.25 per piece for single fold, 4,000 pieces	\$1,000
Feature article about the program in professional association newsletters	Senior staff time spent writing and pitching article	\$30/hr equivalent staff salary; 20 hours	\$600
Op-ed pieces for community paper and other local print media	Senior staff time spent writing and pitching article	\$30/hr equivalent staff salary; 20 hours	\$600
Video news releases for local broadcast media	Senior staff time spent writing script and training spokespersons; then filming	\$30/hr equivalent staff salary; 40 hours	\$1,200
Advertising to put issue on public agenda		Contracted to local ad agency, includes talent fees, shooting, film, and agency costs	\$20,000
		TOTAL COSTS (in-house):	\$11,140
		TOTAL COSTS (for budget):	\$31,140

Timetable (P=Planning; I=Implementation)

Tactic/Tool	ASAP	In 1 Mo	In 3 Mos.	In 6 Mos.	In 9 Mos.	In/At 12 Mos.	At 18 Mos.	At 24 Mos.
Town meeting with all employees	PI							
Write-up of the program in next		P	I		I	I	I	I

Tactic/Tool	ASAP	In 1 Mo	In 3 Mos.	In 6 Mos.	In 9 Mos.	In/At 12 Mos.	At 18 Mos.	At 24 Mos.
employee newsletter (and keeping employees apprised of program developments)								
Flyer that summarizes the program and its benefits to go to all employees with their next pay stubs	P	I						
Personal meetings with regulators	P	I	I					
Simple brochure about the program and its benefits	P	I	I					
Feature article about the program in professional association newsletters		P	P	I		I		
Op-ed pieces for community paper and other local print media	P	I						
Video news releases for local broadcast media	P	I						
Advertising to put issue on public agenda	P	I						

Step 4: Evaluation

Objectives	Data collection method	Evaluation criteria	Evaluation intervals
Increase to 100 percent employee awareness of Ragus-A program. Increase to 100 percent employee knowledge of the purpose of the Ragus-A program.	Survey	100 percent of employees indicate awareness of the program in general and accurate knowledge as to the purpose of the program.	At one year
Gain and maintain support of the program from 75 percent of employees. Maintain employee satisfaction levels with the company at 75 percent or above.	Survey	75 percent of employees indicate that they support the program, and 75 percent of employees indicate they are satisfied with the company.	At one year and 1.5 years (to measure progress) At two years (to measure achievement or failure)
Increase to 100 percent regulators' awareness of Ragus-A program.	Telephone interview	100 percent of regulators indicate awareness of the program in general and accurate	At one year

Objectives	Data collection method	Evaluation criteria	Evaluation intervals
Increase to 100 percent regulators' knowledge of the purpose of the Ragus-A program.		knowledge as to the purpose of the program.	
Gain and maintain support of the program from 75 percent of regulators.	Telephone interview	75 percent of regulators indicate support for the program.	At one year and 1.5 years (to measure progress) At two years (to measure achievement or failure)
Increase to 90 percent the proportion of pro-animal testing doctors and researchers who are aware of the Ragus-A program. Increase to 90 percent the proportion of pro-animal testing doctors and researchers who know the purpose of the Ragus-A program.	Survey	90 percent of doctors and researchers indicating pro-animal testing views also indicate awareness of the program and knowledge about its purpose.	At one year
Gain and maintain support of the program from 90 percent of pro-animal testing doctors and researchers.	Survey	90 percent of doctors and researchers indicating pro-animal testing views AND knowledge about the program also indicates support of the program.	At two years
Increase to and main at least 15 people as the number of pro-animal testing doctors and researchers who are willing to speak publicly in support of the program.	Trend analysis of print and broadcast news stories about the program	News articles include quotes from 15 pro-animal testing doctors and researchers supporting the program.	At two years
Increase to 90 percent the proportion of pro-animal testing community members who are aware of the Ragus-A program. Increase to 90 percent the proportion of pro-animal testing community members who know the purpose of the Ragus-A program.	Focus group of pro-animal testing community members <i>Note:</i> This use of the focus group is not really appropriate, as qualitative methods should not be used	In 9 out of 10 focus groups, the participants indicate awareness of the program and knowledge as to its purpose.	At one year

Objectives	Data collection method	Evaluation criteria	Evaluation intervals
	to obtain quantitative results that can be applied generally from the sample to the population.		
Gain and maintain support of the program from 90 percent of pro-animal testing community members.	Focus group of pro-animal testing community members <i>Note: See above.</i>	In 9 out of 10 focus groups, the participants indicate support for the program.	At two years
Increase to 90 percent the proportion of “undecided” community members who are aware of the Ragus-A program. Increase to 90 percent the proportion of “undecided” community members who know the purpose of the Ragus-A program.	Focus group of (previously) undecided community members <i>Note: See above.</i>	In 9 out of 10 focus groups, the participants indicate awareness of the program and knowledge as to its purpose.	At one year
Gain and maintain support of the program from 60 percent of currently “undecided” community members.	Focus group of (previously) undecided community members <i>Note: See above.</i>	In 6 out of 10 focus groups, the participants indicate support for the program.	At two years

Note: For intervals of evaluations, see column on the right of table above.

Note: Cost estimates in the budget of this plan would be higher today.

Courtesy of Dr. Bey-Ling Sha, who wrote the original plan in a four-hour timed exercise in 2001 when she was an APR candidate with the National Capital Chapter. Notes were provided in 2007 by Dr. Sha, APR, who is now a professor at San Diego State University and serves on the UAB.

→ Case Study: Ramsey Steel

Ramsey Steel Faces Pollution Allegations

Create a comprehensive public relations plan for this case study using either a grid-style or paragraph-style plan. Look at the situation and then develop the research element of your plan first, before you move on to the remainder or look at the sample provided.

Situation

You are the public relations manager for Ramsey Steel. Ramsey has a massive steel mill with 14 open-hearth and four electric furnaces. The open-hearth furnaces present major technical difficulties in collecting and controlling air emissions, which result in air pollution and are becoming problematic to the community and company. Ramsey long has been aware of the potential pollution problem. The company's first Pollution Control Director was named 36 years ago and just retired last month.

The economics of the steel industry establish certain parameters relative to the cost of furnace installation. To install all new electric furnaces at once would be prohibitive because it would require \$40 to \$50 million upfront.

Ramsey has, despite the cost, made a policy decision to replace all the open-hearth furnaces with electric furnaces of equal or greater capacity. Two open-hearth furnaces have just been removed from production and two new electric furnaces installed. At a cost of \$2.5 million, new smoke control devices known as High-Energy Scrubbers have been installed and are doing an excellent job. Also, scrubbers will be installed in the two older electric furnaces at an additional expenditure of \$2 million. The company has set a timetable for replacing the remaining 12 open-hearth furnaces within 20 years and has committed to reducing emissions for its furnaces if a new technology becomes available during that period.

Meanwhile, the company continues to actively test new technologies and is committed to investing in systems that are effective at controlling the pollution created by open-hearth furnaces. As a result of this testing, new overhead systems were installed recently, including a \$500,000 High-Velocity Centrifugal Separator. But, the separator was found to be insufficient. Subsequently, additional equipment, including a bag house and spray chamber costing \$1 million, was tried and found to help but not solve the pollution problem.

There is an increasing volume of local publicity about air pollution in daily print and electronic media. Most of it is slanted and inaccurate. Until recently, Ramsey had not been specifically mentioned in the reports. But last month, Ramsey Steel was named "Polluter of the Month" by the County Pollution Control Office. Much negative publicity followed, which was handled according to Ramsey's Crisis Communication Plan.

Ramsey's mill manager is concerned about adverse effects the publicity may have on the company's future. In light of the overall situation and recent events, the mill manager has requested that you develop a comprehensive corporate communication plan for Ramsey Steel.

Step 1: Describe the formal and informal research needed. Identify a source of information and rationale for each recommended activity.

For steps 2-12, use the following as findings from your research.

- Ramsey's customers are sympathetic to the company.
- Most complaints come from a few people living in the vicinity of the mill who moved into the area after it was built and operational.
- In the greater metropolitan area, the public-at-large is not aware of the exceptional effort and millions of dollars spent by the company.

- A small majority (55 percent of those queried) believes the “Polluter of the Month” award is deserved and feel that the company is concerned only with profits and not with the public welfare.
- Others realize that public incineration and automobile exhaust are responsible for much pollution.
- The mill is located adjacent to two smaller municipalities.
- County Commissioners seem basically sympathetic to the company’s difficult problem, but are also afraid of voter sentiment.
- Some City Council members in the city where Ramsey Steel is located are wondering what they can do to bring Ramsey and other industrial plants in line.
- Some other industries in the area apparently put profits before public health and have made no moves to control air pollution.

Step 2: In light of what you have learned, draft a broad goal for your communications effort—the end result you will hope to achieve for the company.

Step 3: Identify five key publics, audiences or constituent groups.

Step 4: Select one of these groups. Write one short-term and one long-term objective for your communication plan to address your target group and work toward your goal.

Step 5: Write two strategies for this group, telling how you will work toward your objective.

Step 6: Write your main message for this group.

Step 7: Identify three tactics or tools you will use to carry out your strategies. Identify which strategy each tactic is intended to carry out. (Your tactics may be the same for both strategies, or they may be different.)

Step 8: Identify a spokesperson for tactics, as appropriate.

Step 9: Estimate costs associated with each tactic, including out-of-pocket expenses, staff or volunteer time, and in-kind donations.

Step 10: Draft a timetable for your public relations plan. Set up a chart, grid or other device to show how your plan will proceed and the progression of tasks, including start and finish dates.

Step 11: Consider how and when you will evaluate progress toward your short-term and long-term objective, and add that to your timetable. When will you provide an opportunity for correcting your course, if that appears to be strategic?

Step 12: Determine how and when to evaluate progress toward your overall goal, and add that to your timetable.

↑ Plan: Ramsey Steel

Listed below is an example of an **outline planning format (research, planning, implementation, evaluation, budget, timeline)** with various steps included.

Research (Informal)

Method: **Interviews**

Sources

- City Council members in our town and two neighboring municipalities
- County Commissioners
- Chamber of Commerce
- Civic leaders
- Ramsey's retired Pollution Control Director

Rationale: To see how leaders in the community feel about Ramsey. To determine impact of "Polluter of the Month" award. To assess attitudes/beliefs of key decision makers and publics.

Method: **Focus groups**

Sources

- Employees of the mill
- Employees of the mill who are residents in the immediate area of the mill
- Residents closest to the mill
- Residents in other areas of the town where the mill is located and in neighboring municipalities

Rationale: Since formal research questions will need to be constructed, information on issues raised in focus groups will help identify topics that should be included in the formal research phase. Focus groups are a good way to reach targeted publics and take their pulse.

Method: **Mail and telephone logs segmented into contact categories**

Sources

- Employees of the mill who are residents in the immediate area of the mill
- Customers
- Community contacts
- Corporate
- Community influencers and elected officials

Rationale: To identify topics with strong enough levels of concern to prompt people to initiate communication with the company. To probe for underlying values and attitudes. Data such as this can be used to identify which publics need information on specific topics.

Method: **Trends and analysis**

- Sources
- Online searches by related topics
- Industry data banks and bibliographies from trade and professional associations
- Lexis®/Nexis®

Rationale: To determine if this is an industry-wide problem or a local issue; to identify companies that have addressed pollution issues successfully; to determine how much of the “public mind” is focused on pollution issues, and to identify resources and experts who may be able to help.

Method: **Benchmarking**

Sources

- Competitors
- Members of trade associations for outside of region

Rationale: To provide baseline data for future measurement.

Method: **Historical Research—Review of complaints made against the company**

Sources

- Public files of the County Pollution Control Office
- U.S. Environmental Protection Agency
- State Department of Natural Resources
- National, state and local associations focusing on air and water issues

Rationale: To determine the nature and source(s) of complaints and if most complaints are coming from the same people. What specifically the complainers are upset about. And what, if any, solutions/remedies would be acceptable.

Research (Formal)

Method: **Formal media content analysis** (print and broadcast) (using positive, negative, and neutral sort categories and a predetermined sample of media coverage)

Sources

- All references to Ramsey and/or pollution in all local news media (print and electronic) for the past 12 months

Rationale: To determine what, if anything, in the media has contributed to the public perception of the company. To determine if past messages have gotten out. Also, may help identify news outlets sympathetic and unsympathetic to the company on the pollution issue.

Method: **Telephone survey**

Sources

- Random sample of employees who are residents in the mill area and nearby communities
- Random sample of residents of the town where the mill is located and in two nearby municipalities

Rationale: To determine the extent to which residents are aware of efforts Ramsey Steel has made to control pollution and the degree to which they believe Ramsey Steel is unconcerned with public welfare. Most importantly, to find out what changes and remedies would improve their perception of Ramsey Steel.

Method: **Formal online survey**

Sources

- Statistically valid random sample of customers

Rationale: To find out if customers are sympathetic to the company's plight. Aware of all the efforts the company has made to curb pollution. Willing to share the costs of change.

Planning

Problem

Though Ramsey Steel has made many efforts to address pollution issues in the running of its mill, the community and the County Pollution Control office think of the Company only as a pollution creator.

Publics

- Employees
- *Community influencers and elected officials
- *Residents of local community and two nearby municipalities
- *County Pollution Control Office
- *City Council members and community leaders in three municipalities
- Local media
- *Customers
- Stockholders
- Environmental groups
- Regulators such as EPA, DNR, etc.

*Indicates key publics that must be identified and incorporated into the plan.

Objectives

Short-Term

- Within three months, 75 percent of employees who reside in three targeted municipalities will articulate support for Ramsey Steel's position as an industry leader in pollution control, including ability to state at least three of the organization's key messages.

- Within three months, the County Pollution Control Officer will have stopped making negative public comments about Ramsey Steel.
- Within three months, local media (print and electronic) coverage of Ramsey Steel's pollution-control efforts will be 20 percent less negative than in the original content analysis.
- Within six months, 30 percent of local and nearby residents given a list of actions that could be taken to curb pollution will be able to identify at least two that Ramsey Steel has taken (contacted in intercept interviews).
- Within six months, 60 percent of stockholders surveyed will confirm support for Ramsey Steel's pollution-control efforts.
- Within nine months, 15 percent more customers than in the original online survey will identify Ramsey Steel as a company that acts to control pollution in another online survey.

Long-Term

- Employee opinion survey question related to mission will retain or improve score over previous year.
- Within one year, 60 percent of local residents surveyed will report that they believe Ramsey Steel is trying to control its pollution.
- Within 18 months, five customers will volunteer to write testimonials about Ramsey Steel's pollution-control efforts.
- Within two years, the local media (print and electronic) will have run 50 percent more positive stories about Ramsey Steel than evidenced in the original content analysis.
- Within three years, the County Pollution Control Office's annual reports and public statements will identify Ramsey Steel as a leader in pollution abatement.
- Receive significant, relevant industry award within 36 months.

Strategies

All audiences: two-way communications that respond in genuine, sincere way to real concerns.

Employees

- Use existing internal communication channel to highlight Pollution Control efforts; if none exists, set up a two-way feedback channel on corporate intranet to keep employees up-to-date with news and activities. Employee communications should be posted before communications with other audiences unless in violation of law.
- Leverage external educational/information campaign for internal educational/information campaign.
- Engage select sample of employees who reside in targeted municipalities as opinion leaders on Pollution Control initiatives.
- Residents of local community and two nearby municipalities, including community influencers, environmental groups and elected officials.
- Use an information/education campaign that relies on both self-published and self-distributed communication vehicles.
- Use a media relations strategy that includes stories with third-party credibility.
- Use a community-engagement strategy focused on opinion leaders in the local municipalities.

County Pollution Control Office

- Build relationship through frequent contacts and regular dissemination of related information. Couple personal interaction with factual data presented verbally and graphically.

Local media

- Increase contact with all media outlets in the area.
- Provide opportunities for media to become knowledgeable about the company through open-house media tours, editorial boards, media breakfasts, invitations to community education events, technical reports and availability of knowledgeable experts.

Customers

- Make customers a part of the solution by giving them written and verbal opportunities to learn more about the company and give the company feedback about their satisfaction or concerns regarding its performance.

Stockholders

- Inform them through existing communication vehicles, as well as special graphic and visual presentations that quickly convey the messages.

Key Messages

1. Ramsey Steel is a good corporate citizen: contributes to the local economy and a clean environment.
2. Ramsey Steel will continue to work collaboratively with employees, community members and regulators to enhance our efforts and improve our communities.
3. Ramsey Steel needs your help and your input to continue to improve our communities.

Implementing/Executing/Communicating

(Implementing the plan: tactics, tools and spokespersons)

Employees

Message

- See above.

Tactics/tools

- Employee Advisory Committee—select group of front-line employees who reside in targeted municipalities; two-way, face-to-face efforts to monitor and anticipate community opinions, concerns, questions and opportunities; engage friends and neighbors within community, sample for community sentiment; provide educational/informational material; enlist in ownership of the plan and company's reputation in the community.
- Employee newsletter/intranet—dedicated-space stories focused on Ramsey's pollution-control efforts, care for the environment, etc.
- Supervisor meetings/management briefings—series of key messages over time to align with public campaign.
- Create specific channel(s) of communication with audience segment that resides in the mill area and surrounding communities.

Residents of Local Community and Two Nearby Municipalities

Message

- See above.

Tactics/Tools

- Community newsletter—(quarterly) describing efforts to control pollution and improve environment.
- Electronic newsletter—(monthly) to opinion leaders in three municipalities focused on Ramsey as corporate citizen; environmental efforts/plan; testimonials/quotes from employees engaged as opinion leaders.
- Website—microsite—dedicated to environmental efforts; include long-range plan; Pollution Control Officer’s blog, FAQs; Interactive “how citizens can take action to improve environment.”
- Speakers’ bureau and video—available to civic groups, schools, city councils and other organizations interested in environmental topics, showing how citizens can take action to improve environment and what Ramsey is doing to “do its part.”
- Posters—(a series of six) displayed in buses and on public bulletin boards in the local area. Content will be a different slogan on each with actions being taken within the county to control pollution. Prepared jointly with the Pollution Control Office.
- “Clean Up with Ramsey” auto trash bags—(use these for the duration of the campaign) printed and distributed in county recreation centers, car washes and service stations.
- Image advertising/infomercials—(three per month for first six months, two per month for the next six months, one per month for balance of campaign) in all local media outlets, telling Ramsey’s story—the new equipment and costs of equipment are not intended to improve product, but to save the environment.
- Environmental and community improvement events—Partner with the communities and work with environmental groups, community influencers and elected officials to hold environmental, community-wide events focused on improving the communities.

Spokespersons

- Ramsey’s Pollution Control Officer and staff, as well as public relations staff (speakers’ bureau)
- President of Ramsey and Pollution Control Officer (video)
- President, environmental leaders, engineers (image ads)

County Pollution Control Office

Message

- See above.

Tactics/tools

- Monthly meetings—with Pollution Control Officer and staff to discuss complaints that have been received, activities under way at Ramsey to further pollution control at the mill, and Ramsey’s public service efforts to increase public awareness and participation in environmental improvements.
- Quarterly letters—to the County Pollution Control Office, outlining activities the company has taken internally to control pollution and areas of cooperation with the community to improve the environment.
- Tours of the mill—each time new equipment is installed and old (polluting equipment) is removed.
- Hold regular open forums with mill management team and pollution-control agency management team.

Spokespersons

- Pollution Control Officer and Public Relations Director (for monthly meetings)
- President (as signatory of letters)
- Public relations staff, Pollution Control Officer and mill Operations Manager (tours)

Local media

Message

- See above.

Tactics/Tools

- Establish One-on-One Media Relationships—with reporters covering the mill.
- Set Editorial Board Meeting(s) —with newspaper(s) serving each of the three communities. Ramsey President, Pollution Control Officer and public relations staff will attend.
- Tours—of the mill, including a question-and-answer session with corporate executives after the tour; special tours for media when new equipment is operational with lots of description of how it curbs pollution, how much it cost the company, etc.
- Insider interviews—with Pollution Control Officer and employees “on the line.”
- Testimonials—from customers who praise the efforts of the company.
- Feature stories—on the steel industry and the industry’s efforts to create a good product and work for a clean, safe environment.
- Backgrounder/fact sheets—including benchmarking data; industry trends; Ramsey’s leadership efforts; equipment installations; long-term environmental plan contact information of third-party industry experts.
- Online newsroom—with fact sheets; quotes; links to third-party research and experts.

Spokespersons

- Media Relations Director for meetings.
- Internal experts on pollution, equipment, operations for mill tours.
- Mill president and Pollution Control Officer for question-and-answer session.

Customers

Message

- See above.

Tactics/Tools

- Customer newsletter—four times a year with information about people in the Ramsey organization, what’s up at the mill, new products, and other things Ramsey is doing to be a good corporate citizen.
- Feedback e-mail address—in every newsletter asking for suggestions on pollution control, environmental safety and improvement programs customers have seen or think might work, and general feedback on products and people of Ramsey.
- Sales team training/speaking points—on Ramsey as an industry leader in environmental issues; feedback line for sales team to PR Department to monitor customer feedback, identify possible testimonials.
- Set up interactive feedback mechanism on the Ramsey Steel Internet site.

Spokespersons

- Director of Public Relations and Director of Sales
- Sales force, using key messages

Stockholders

Message

- You can be proud of the products Ramsey produces. Successful pollution control is good for business and profits.

Tactics/Tools

- Annual Stockholders' Report—will have a shaded box on page one for the duration of the campaign, providing information on what Ramsey is doing to control pollution.
- Special direct mail—to all stockholders in six months, consisting of photo essay showing Ramsey controlling pollution in the mill and helping community members control pollution. Charts, graphs and pictures predominate; little text.

Spokesperson

- Chairman of the Board and President

Budget

(See attachment.)

Timetable

(See attachment.)

Evaluation

Short-Term Objectives

- Within three months, 75 percent of employees who reside in three targeted municipalities will articulate support for Ramsey Steel's position as an industry leader in pollution control, including ability to state at least three of the organization's key messages. Use internal communication channels to survey select sample of employees who reside in targeted municipalities on their interactions in their local communities, including an open-ended question inviting feedback identifying three key messages that they believe to have been most important. Responses from 75 percent of these selected employees will include at least three of the organization's key messages.
- Within three months, the County Pollution Control Officer will have stopped making negative public comments about Ramsey Steel.
- Attend all public meetings where pollution is an issue and/or the Officer might attend or speak. Assess comments on a scale of 0-10 with zero representing no comments made. Piggyback on content analysis described below.
- Within three months, local media (print and electronic) coverage of Ramsey Steel's pollution- control efforts will be 20 percent less negative than in the original content analysis.
- Conduct a content analysis using the same methodology and audience as the first one described in research section (all local print and electronic media). Negative coverage will be 20 percent less.
- Within six months, 30 percent of local and nearby residents given a list of actions that could be taken to curb pollution will be able to identify at least two that Ramsey Steel has taken.

- Do intercept interviews at the post office, bank and supermarket. Ask every 10th person to review a list of pollution-control actions and identify two that they believe Ramsey Steel uses to control pollution at its local steel mill. See how many of those interviewed can correctly identify two actions that are actually being taken by Ramsey Steel.
- Within six months, 60 percent of stockholder surveyed will confirm support for Ramsey Steel's pollution-control efforts.
- Survey all stockholders. Sixty percent of respondents will say they support the company's pollution-control efforts
- Within nine months, 15 percent more customers than in the original online survey will identify Ramsey Steel as a company that acts to control pollution.
- Re-survey all customers via an online survey. Be sure to re-ask all questions, especially those that deal with whether Ramsey Steel acts to control pollution. Compare original pre-communication plan results with current results. Fifteen percent of customers will identify pollution control as something the company does well.

Long-Term Objectives

- Annual employee opinion survey question related to mission will show improved score over previous year.
- Within one year, 60 percent of local residents surveyed will report that they believe Ramsey Steel is trying to control its pollution.
- Repeat research section's formal telephone survey of this population using the same sampling method. Compare results of pre-communications program survey with the one-year survey to see if 60 percent of residents view Ramsey Steel's pollution control efforts positively.
- Within 18 months, five customers will volunteer to write testimonials about Ramsey Steel's pollution-control efforts.
- Review letters, faxes and e-mails sent to the office. See if there are five customers who have commented positively on the company's products and efforts to control pollution. Ask them if they will allow their words to be used as testimonials. If five say yes, the objective has been met.
- Within two years, the local media (print and electronic) will have run 50 percent more positive stories about Ramsey Steel than evidenced in the original content analysis.
- Conduct a third content analysis using the same methodology as the first and second ones, drawing on the same media (all local print and electronic media). Compare positive coverage figures from the first to the second set of data. Fifty percent more of the coverage will be positive.
- Within three years, the County Pollution Control Office's annual reports and public statements will identify Ramsey Steel as a leader in pollution abatement.
- Attend all public meetings of the Pollution Control Office and review minutes, news, annual reports and related records every six months. Focus will be on determining that Ramsey Steel is not viewed negatively and, more importantly, that Ramsey Steel is being cited as a good example of pollution abatement and corporate citizenship.

When Evaluation Should Be Done

All evaluation will be conducted in the month following the timeframe set in the objective:

County Pollution Office	4th and 37th month
Media content analysis	4th and 25th month
Employee opinion survey	4th month and regularly thereafter
Intercept interviews with residents	7th month
Stockholder survey	7th month
Online survey of customers	10th month
Phone survey of residents	13th month
Testimonials provided by customers	19th month
Positive stories	25th month
Absence of citation as polluter/ recognition	37th month

Note: In addition, the total plan will be informally assessed quarterly so that midcourse corrections can be made as needed. Further assessments will be made annually, including reports to the CEO and board of directors.

Ramsey Steel Public Relations Plan Budget

(Note: Some activities require only staff time and no additional budget.)

Salaries: assumes full time dedicated to this project			
Director		\$80,000.00	
Assistant		\$35,000.00	
Office manager		\$18,000.00	
Support staff		\$15,000.00	
Benefits at 35 percent		\$50,000.00	
			\$198,000.00
Preplan research			
Informal			
Leader interviews	Staff time/existing materials		

Resident focus groups	(\$500 per group)		\$8,500.00
	Professional facilitator	\$5,000.00	
	Room rental	\$500.00	
	Report writing/production	\$3,000.00	
Mail/telephone analysis	Staff		\$1,000.00
Trend analysis	Staff time		
	Purchase of publications, data	\$1,000.00	
Complaint reviews	Staff time		
Formal			
Content analysis	PR firm		\$40,000.00
	Monitor	\$15,000.00	
	Analysis and report	\$25,000.00	
Phone survey	PR firm conduct and report		\$15,000.00
	Sample selection	\$500.00	
	500 interviews @ \$25 ea.	\$12,500.00	
	Analysis and report	\$2,000.00	
Online survey			\$1000.00
	Survey design and publication	\$1000.00	
Tools			
Community newsletter			\$83,000.00
	Design	\$5,000.00	
	Print 50k @ .30x4 quarters	\$60,00.00	
	Postage 50k @ .09x 4 quarters	\$18,000.00	
Web microsite			\$10,000.00
	Staff time (write/design)		
	Web developer (Interactive design)	\$10,000.00	
Video/DVD			\$8,500.00
	Script	\$500.00	
Principles for Accreditation in Public Relations Beta Study Guide ■ © 2012 UNIVERSAL ACCREDITATION BOARD ■ PAGE			
	Talent	\$2,500.00	130
	Production	\$5,000.00	

Timeline for Ramsey Steel Public Relations Plan

p = planning

d = development

e = execution

Note: Additional years should be added as needed for further planning.

	J	F	M	A	M	J	J	A	S	O	N	D	Y2Q1	Y2Q2	Y2Q3	Y2Q4		
													1					
Preplan research																		
Informal																		
Leader interviews	e																	
Resident focus group		e																
Mail/telephone analysis	e																	
Trend analysis		e																
Complaint review	e																	
Formal																		
Media analysis		d	e															
Phone survey		p	d	e														
Online survey		p	d	e					e									
Tools																		
Community newsletter			p	d	e	e	e	e	e	e	e	e	e	e	e	e		
Web microsite		p	d	e														
Speakers' bureau					d	d	e	Available as requested										
Video for speakers/web		p	d	d	d	e												
Auto trash bags		p	d	e														
Image ads			p	d	e	e	e	e	e	e	e	e	e	e	e	e		
Employee advisory committee		p	e	e	e	e	e	e	e	e	e	e	e	e	e	e		
Internal Comm feature		d	e	e	e	e	e	e	e	e	e	e	e	e	e	e		
Poll control meetings		d		e	e	e	e	e	e	e	e	e	e	e	e	e		
Poll control letters				e		e		e										
Poll control equipment				As new equipment comes on-														
Media meetings		p	d	line		e		e			e			e		e		
Media tours		p	d	e	As new equipment comes on-													
Insider interviews			p	d	e	line					e				e			
Testimonials		d	d	d		e	Available as needed											
Feature stories		p	d	e	d	e	d	e	d	e	d	e	d	d/e	d/e	d/e	d/e	
Customer newsletter				p	d	d	e		p	d	d	e	p/d	e	p/d	e		
Stockholder newsletter					p	d	e						p/d		e			
Annual report						p	d	d	d	d	e	p	p/d	d	e			
Evaluation																		
Tools		p	d	e		e		e		e		e	e	e	e	e		
Budget		p		e		e		e		e		e	e	e	e	e		
Timetable				e		e		e		e		e	e	e	e	e		

