Fourth Edition

stand out
WHEN YOU START OUT

Study Guide

Certificate in Principles of Public Relations Examination

A Preparation Tool for Students

Functioning as part of the Public Relations Society of America
www.praccreditation.org

Acknowledgements

Universal Accreditation Board (UAB) members have developed this study guide to help candidates prepare for the Certificate in Principles of Public Relations Examination. The Certificate, launched by the Universal Accreditation Board in 2013, provides third-party validation of what entry-level candidates know about public relations and helps managers differentiate applicants entering the workforce. The Examination resulted from five years of research and development led by Jay Rayburn, Ph.D., APR, CPRC, Fellow PRSA, of Florida State University. It involved multiple subject-matter experts in public relations. Examination items assess basic knowledge of public relations principles, with particular emphasis on the four-step process of public relations and on ethics.

The Study Guide for the Certificate in Principles of Public Relations Fourth Edition represents a significant revision and update by practitioner and educator Sharee LeBlanc Broussard, Ph.D., APR.

This edition incorporates suggestions from previous Examination candidates and current and former members of the Universal Accreditation Board. Feedback on this study guide is always welcome. Please send comments to accred@prsa.org.

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About the Universal Accreditation Board

The Universal Accreditation Board, established in 1998, is a credentialing agency. Traditionally, the credential has been for members of nine public relations professional organizations and public affairs practitioners in the U.S. Department of Defense (though in 2022, the UAB began allowing nonmembers to take the Examination for Accreditation in Public Relations). Each of the participating organizations contribute resources to the Accreditation process. Senior-level volunteers — practitioners, educators and military personnel — represent participating organizations on the board and oversee the Accreditation program. That program includes **Accredited in Public Relations** (APR), **Accredited in Public Relations and Military Communication** (APR+M), and the **Certificate in Principles of Public Relations**.

UAB participating organizations:
Asociación de Relacionistas de Puerto Rico
California Association of Public Information Officials
Florida Public Relations Association
Maine Public Relations Council
National Association of Government Communicators
National School Public Relations Association
Public Relations Society of America
Religion Communicators Council
Southern Public Relations Federation

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Study Guide Section 1: Introduction

We are glad you are preparing to earn the Certificate in Principles of Public Relations. We're sure that you will find the experience rewarding. Taking the Certificate Examination will give you a valuable head start toward becoming Accredited in Public Relations (APR) when you become eligible to sit for the Examination for Accreditation in Public Relations.

The **Certificate in Principles of Public Relations** is offered to students who are (a) within six months of graduation (before or after) from an accredited college or university whose undergraduate or master's degree is in public relations or a related area of study AND (b) members of the Public Relations Student Society of America (PRSSA) or student members of another UAB participating organization such as the Florida Public Relations Association or the Southern Public Relations Federation.

About the *Study Guide for the Certificate in Principles of Public Relations*

This study guide is organized into four sections: 1) Introduction, 2) Materials Referenced, 3) Concepts Tested and 4) Exercises. Key concepts and definitions are provided.

This guide is not meant as a stand-alone preparation tool. It should complement/reinforce what students receive in their coursework and attempt to offer a basic summary of common content in the texts on *The Bookshelf*. In this study guide, you will find references to resources not on the recommended bookshelf; these may be more frequently updated than the recommended bookshelf or are intended to encourage you to explore the knowledge, skills and abilities (KSAs) further.

Students/Recent grads will receive the most benefit from this guide if they go through the information with an eye toward both **APPLYING these principles** and **SEEING these concepts in action** during their day-to-day lives, especially in media content consumption. Exercises such as "In the Wild" should help this process.

About the Examination

The Examination for the Certificate in Principles of Public Relations has been thoroughly tested for validity. Successful completion of the Examination demonstrates a significant degree of knowledge about public relations principles and ethics.

Development of the Examination for the Certificate in Principles of Public Relations and ongoing updates has involved scores of volunteers, thousands of hours, world-class research, consulting with test development companies and years of focused work. The Examination is the product of a thorough scientific process that is grounded in state-of-the-art best practices in professional testing.

Each item on the Examination has gone through rigorous development, sourcing and pre-testing. A subject-matter expert who was trained by a test development specialist to write test questions developed each item you will encounter. All questions were tied to at least two texts in the public relations *Bookshelf*, peer-reviewed and edited for readability and clarity by a professional test editor, then reviewed by a professional psychometrician, and finally reviewed, revised or rejected by a panel of Accredited public relations experts that included many of the leading scholars, educators and practitioners in our industry.

What's on the Examination

The Examination tests six groupings of knowledge, skills and abilities (KSAs). The chart below indicates the percentage of the Examination that is devoted to each category. Detailed descriptions of the subsets of each KSA grouping are given in later sections of this study guide.

KSA Group	% of the Examination	
Researching, Planning, Implementing and Evaluating Programs		45%
Ethics and Law		20%
Business Literacy		15%
Communication Models and Theories		10%
Crisis Communication	5%	5%
Concepts and Current Issues in Public Relations		5%

Preparation Tips

Familiarize yourself with the KSAs. These cover what is tested on the Examination for the Certificate in Principles of Public Relations.

Pay attention to the percentage listed for each KSA. For example, researching, planning, implementing and evaluating programs account for 45% of the Examination while crisis communication is 5%. This means 45% of the questions relate to research, planning, implementing and/or evaluating, but only 5% involve crisis communication. Use the KSAs and these percentages to guide your preparation.

Refer to *The Bookshelf of Recommended Texts*, and use the information provided in this study guide.

Review, know and be able to apply the PRSA Code of Ethics. Use exercises and case studies on many of the participating organizations' websites.

If you have questions, ask your professor or student organization's adviser. You may contact accred@prsa.org for guidance about others who can assist you.

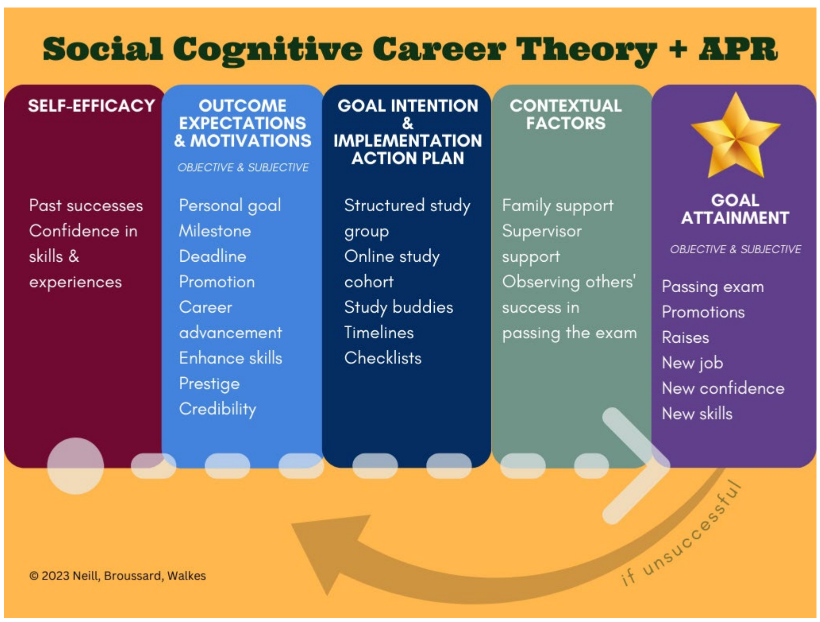
Preparing to succeed

Prepare earnestly and adequately to be successful in the Examination. The Examination is designed to test your knowledge of the principles of public relations practice. Questions most often present brief scenarios that require you to apply public relations principles to select a correct response.

You'll be more comfortable and at ease if you have "done your homework" and become familiar with basic concepts and knowledge that senior practitioners say entry-level public relations personnel should know. Practice by using the four-step process (RPIE) and identifying "textbook" concepts in the real world.

A fall 2022 study by the Universal Accreditation Board's Research Workgroup (©2023 Neill, Broussard & Walkes) found that factors associated with Social Cognitive Career Theory such as self-efficacy (the belief in one's own ability to achieve specific goals); outcome expectations (objective like hiring, promotion, raises; or subjective like more confidence); contextual factors (study time, support, etc.); and intention contributed to candidates successfully earning the APR credential. Through a series of focus groups with APRs who earned the credential during the COVID-19 pandemic, they determined **recommended keys to success** for future APR or Certificate in Principles of Public Relations candidates as well as anyone attempting to achieve a professional development goal:

- Enter the process with determination and confidence.
- Participate in study cohorts and/or find a study buddy that will hold you accountable.
- Obtain the support of your direct supervisors or professors and people close to you or who depend on you, like family, friends or your significant other.
- Remain focused on the desired outcomes.
- Set up a personal timetable or checklist for the process.
- Develop personalized study materials like your own notes, flashcards, slide decks, Quizlets or similar.



What to expect

Examination length

You will have a **total of three hours** to complete the Examination for the Certificate in Principles of Public Relations. Use all the time allotted to make certain you answer all questions posed. You can choose whether to take a break; if you do, the time clock will continue running. It does not stop during your break. When you return, you will need to repeat any security measures.

Exam questions

All questions are multiple-choice. The Examination for the Certificate in Principles of Public Relations includes about 100 questions. Question order is randomized from candidate to candidate. Many questions are presented as brief scenarios. The number of questions on each subject reflects the percentages listed with the KSAs. In other words, more questions focus on Ethics and Law (20%) than on Crisis Communication (5%).

All questions on the Examination are sourced back to more than one book from *The Bookshelf* list. This study guide is a summary of what's in *The Bookshelf* as well as other resources. The UAB routinely updates the Examination, so some of the questions on the Examination are being tested for future inclusion and aren't counted toward your final score.

Scheduling and Taking Your Examination

Once your application has been approved, you will receive an email from UAB that includes step-by-step information on:

- Creating your profile in the TESTWise™ platform.
- Scheduling, rescheduling or canceling the Examination time.
- Steps to complete prior to Examination day.
- Computer, browser, internet speed and software requirements.
- Examination day rules.
- How to log in for the Examination.
- Customer support contacts.

Testing tips from Certification Management Services, Inc. (the UAB's testing vendor).

1. You may use a computer mouse or keyboard commands.
2. You will take a step-by-step tutorial before starting the Examination, which generally takes about 15 minutes. Relax and take your time to become comfortable with the process. Tutorial time is included in the period you have to complete the Examination.
3. The tutorial will show you how to mark your answers to questions, how to navigate through the Examination and how to flag questions to return to later. All responses on the Examination are multiple-choice. You need only to click boxes to designate your answers. No typing or writing is needed.
4. You do not have to select a final answer for every question as you come to it. The program will let you electronically flag those that you want to return to.

5. Some questions require two or three answers. Items with multiple answers will clearly state how many responses you need to select. Read carefully and remember that the Examination includes no trick questions.
6. Throughout the Examination, the 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 that says the Examination is over. If you complete the Examination before time is up, you may leave.
7. The software will score your Examination and generate a feedback page. It tells you how you performed on scored questions in each KSA area and will be emailed to the address you provide when you make the appointment. This feedback page is not your official pass/fail notification. The UAB will officially notify you of your results.

Examination results

Once you complete the Examination for the Certificate in Principles of Public Relations, you will receive an email with preliminary results with information — consider this a feedback page. It is intended to help you identify KSA areas that you may want to strengthen through experience and professional development. The feedback page also will help you identify areas for additional preparation if you need to retake the Examination. Because a small percentage of the questions on each examination are being tested for suitability, the feedback page is not your official notification. **Your official notification of Examination *Pass* or *Fail* will come from the Universal Accreditation Board.**

If you pass the Examination, you will be mailed a Certificate in Principles of Public Relations, which does not expire and does not require further maintenance.

You should add the Certificate in Principles of Public Relations to your résumé to your LinkedIn profile and highlight this accomplishment as you apply for jobs, interview or otherwise approach potential employers. Please link to information about the Certificate on your résumé and portfolio.

One way to write it could be: *"As a member of [PRSSA or SPRF or FPRA], earned the Certificate in Principles of Public Relations in YEAR from the Universal Accreditation Board, a consortium of nine public relations organizations that also oversees Accreditation in Public Relations. The Examination tested six key groupings of public relations knowledge, skills and abilities."*

If you don't have much room on your résumé, you might simply list and link like this: *"YEAR, earned the Certificate in Principles of Public Relations through the Universal Accreditation Board."*

If you pass the Examination, please never abbreviate Certificate in Principles of Public Relations, and **you may not use initials after your name to indicate you have earned it**.

Questions? Concerns? Problems?

FAQs

Answers to Frequently Asked Questions about the Examination for the Certificate in Principles of Public Relations are available at www.praccreditation.org.

Responsibility for rescheduling

If you find that you cannot participate in the Examination after you have scheduled your appointment, you may reschedule your time. **It is your responsibility to cancel or reschedule the Examination time.**

No refunds or transfers

The fee you have paid for the Examination will not be refunded if you fail to complete the Examination for any reason, including not having proper identification. Your fee may not be transferred to any other testing cycle or to any other person.

Contact

If you have questions or concerns about your Examination participation, please contact accred@prsa.org or (212) 460-1436.

Study Guide Section 2: Material Referenced on the Examination

Readings

You do not have to buy or use all the books on *The Bookshelf* of recommended texts. The Universal Accreditation Board recommends that candidates for Accreditation or the Certificate in Principles of Public Relations review the contents of at least one general text in detail and suggests additional use of one or more of the specialized texts listed below.

"*The Bookshelf*" (Recommended Texts)

Each question on the Examination is sourced to more than one of these books:

- ***Associated Press Stylebook and Briefing on Media Law, 56th edition* (ASIN: B0B72HTS37) or recent**
  Associated Press (2022). AP Stylebook and Briefing on Media Law (56th ed.) The Associated Press.

- ***Cutlip and Center's Effective Public Relations, 11th edition* (ISBN: 0132669153) or current**
  Broom, G. M., & Sha, B-L (2013). *Cutlip and Center's Effective Public Relations* (11th ed.). Pearson Education.

- ***Primer of PR Research, 3rd edition* (ISBN: 146252270X) or current**
  Stacks, D. W. (2017). *Primer of Public Relations Research, 3rd edition.* Guilford Press.

- ***Public Relations, 2nd edition* (ISBN: 0190925094) or current**
  Kelleher, T. (2021). Public Relations, (2nd ed.) Oxford University Press.

- ***Public Relations: Strategies and Tactics, 12th edition* (ISBN: 9780137847730) or current**
  Wilcox, D. L., Reber, B. H., Shin, J.H. & Cameron, G. T. (2023). *Public Relations: Strategies and Tactics* (12th ed.). Pearson Education.

- ***Strategic Planning for PR, 6th edition* (ISBN 9780367903848) or current**
  Smith, R. D. (2021). *Strategic Planning for Public Relations* (6th ed.). Routledge.

- ***The Practice of Public Relations, 14th edition (ISBN:* 0134895444) or current**
  Seitel, F. (2020). *Practice of Public Relations* (14th ed.). Pearson Education.

- ***This is PR: The Realities of Public Relations, 11th edition* (ISBN: 1111836833) *or current***
  Newsom, D., Turk, J.V. and Kruckeberg. D. (2013). *This is PR: The Realities of Public Relations* (11*th ed.).* Wadsworth Cengage Advantage Books.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE):

- Resources/Preparation assessment and plan.
- Self-assessment.

Study Guide Section 3: Concepts Tested via the Examination

What is Public Relations?

PR Defined

Public relations is "the management function that establishes and maintains mutually beneficial relationships between an organization and the publics upon whom its success or failure depends," according to Chapter 1 of Cutlip & Center's "Effective Public Relations," a text that has helped define the field since it was first published in the 1950s.

Another commonly cited definition appeared in 1984 in "Managing Public Relations," by James Grunig and Todd Hunt, as "the management of communication between an organization and its publics."

In 2012, PRSA developed its own definition of the profession, summarizing it as "Public relations is a strategic communication process that builds mutually beneficial relationships between organizations and their publics."

One of the newest industry definitions comes from the International Public Relations Association, composed of PRSA and dozens of other PR organizations around the world. In 2019, the IPRA board approved this statement to emphasize the role of trust and ethics in modern communication: "Public relations is a decision-making management practice tasked with building relationships and interests between organisations and their publics based on the delivery of information through trusted and ethical communication methods."

There are other definitions as well. While these may vary, common language should be noticeable:

1. Management.
2. Establishes AND maintains.
3. MUTUALLY beneficial.
4. Relationships.
5. Between organizations and their publics.

Building relationships is an absolute necessity for effective public relations. It's a spherical concept (all directions). More than just networking or meeting people, practitioners need to actively cultivate relationships with coworkers, colleagues, leadership and various internal publics as well as external publics like vendors partners, peers, community leaders, the media and much more. How? Through interactions, regular communication, understanding needs, follow-up/follow-through, transparency, consistency, etc., that bring value to the relationship.

According to common definitions, PR is more than simply creating and distributing a one-off message here and there or pumping out content as a technician. PR practitioners do not create content for the joy of creating content, they strategically communicate on behalf of or as the organization to achieve some desired outcome(s). PR practitioners contribute to the success of the organization by determining what's necessary and making things happen to achieve organizational goals in ways that resonate with and, ideally, most benefit all parties involved.

Twelve Typical Functions of Public Relations

Competencies (functions)

1. Trusted counsel — Advise and anticipate.
2. Internal communication — Engage employees and build trust.
3. Media relations — Develop public trust and support by working through journalists and bloggers.
4. Community relations — Establish public trust and support by working with community groups.
5. External communication to customers/stakeholders/investors — Build public trust and support.

Public Relations Four-Step Process

6. Research.
7. Plan.
8. Implement (execute, communicate).
9. Evaluate.

Other

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

Advocacy

Public relations practitioners are **advocates** for the organizations they represent. **Responsible advocacy** is important. In the marketplace of ideas, public relations can amplify voices through targeted communication efforts. While both journalism and advertising also involve communication and the use of similar tools, all three differ in intent and regulation. Ethical PR practice conforms to legal obligations, ethical standards and normative rules. Journalism should provide impartial, objective information to the public; it also is regulated by legal obligations, ethical standards and normative rules. Advertising (controllable; paid) aims to persuade and promote products or services, and as "commercial speech," it is highly regulated by multiple federal agencies.

Publics

Public relations forms, builds and maintains relationships between organizations and their publics by determining and addressing common interests.

"The public" or "the general public" are common terms, but that concept really shouldn't exist for PR professionals. Our total audience is composed of groups of publics with whom we can interact. **Publics** are subgroups that have some commonality with whom practitioners need to cultivate relationships on behalf of their organizations. Practitioners attempt to aim for communication that will resonate with relevant subgroups.

For example, if you're communicating on behalf of a chemical company, some publics with whom you'd need to communicate could be employees, people who live near your manufacturing plant, regulators, local government officials, etc. Think about how each of these publics might need different communication from your organization for the same topic — SAFETY:

- *Employees*: Communication about personal protective equipment or accident prevention.
- *Neighbors*: Communication about what they should do if an accident were to occur at your plant.

- *Regulators:* Communication about steps the organization takes to meet or exceed legal requirements.
- *Local government officials:* Communication about safety records, payroll contribution to the local economy or corporate citizenship.

Sometimes people use similar words interchangeably, but they don't always mean the same thing. A **public** (subgroup with commonality; some use the term *stakeholders*), is not the same as an **audience** (group attuned to a communication channel), or a **market** (group that may buy a particular product or service), although all three terms reference a subgroup of the larger population.

When determining publics/audiences/markets, two important concepts to consider are **demographics** (measurable/observable characteristics like age, race/ethnicity, gender, income, occupation, education) and **psychographics** (commonalities among subgroups that are not easy to measure, like hobbies, lifestyle/lifestage, values, personality traits, attitudes, openness to new experiences, etc.). Demographics can provide the foundation, but psychographics offer a nuanced view and deeper understanding of those with whom the organization is communicating. Some practitioners go so far as to develop *personas* or *avatars* that represent an ideal of the person they're trying to communicate with in order to form strategy, shape messages with clarity/personalize content, understand motivations, and target effectively.

Industry evolution/Societal change

Promotion of people, places, goods and services can be found in the earliest recorded human history, but it is not hyperbole to say that the United States and American business gave birth to public relations as it is practiced today. PR historian Scott Cutlip found valuable lessons in the American Revolution: the importance of organization, symbolism, slogans, staged events, strategic timing, and comprehensive campaigns in achieving effective communication and garnering public support. Growth and trends in business during and after the Industrial Revolution created the conditions for the public relations profession to develop in the 20th century. The advent of social media in the 21st century has helped the field progress from predominantly one-way communication to more interactive, two-way communication, but the lessons learned in the Revolution are still found in practice today.

In the early days of modern public relations, most practitioners were male and white, though there were some prominent women and people of color. Compared to the citizenry of the time, most were highly literate and highly educated and many had honed their crafts during wartime; one was famed psychologist Sigmund Freud's nephew Edward Bernays. Just a couple of the earliest definitions of public relations from that time are: "the art of getting believed," (Lee, 1914) or "the engineering of public consent," (Bernays, 1923). These early modern practitioners popularized concepts of wooing/winning/shaping/influencing/crystallizing public opinion and they shaped the industry by leveraging their understanding of psychology, learning, persuasion, etc., to achieve organizational goals.

Recognizing their power, early- to mid-20th century practitioners developed practical guidelines and codes of ethics, which continue to evolve as practice and technology advance. See for example:

https://page.org/site/the-page-principles,

www.prsa.org/about/ethics/prsa-code-of-ethics,
https://prcouncil.net/advocacy/guidelines-on-generative-ai/.

As women entered the modern workplace, and through the 20th century, the field of PR became predominantly female. The Bureau of Labor Statistics, Census Bureau and multiple industry studies indicate that public relations is majority female and white, though the highest PR leadership positions in organizations are held more frequently by men.

Social movements of the mid-20th century ushered in societal change. In the first quarter of the 21st century, a relatively brief period of time, the confluence of information sharing via online tools like blogging and social media, COVID-19 and digitally fueled movements like Me Too, Black Lives Matter, marriage equality, Stop AAPI Hate, #StandUpToJewishHate, etc., has meant rapid shifts in perspective-taking and expectations within the last decade.

Diversity, equity, inclusion, access and belonging (referenced as DEIAB or DEI for short) are five principles that help people from all backgrounds feel valued and respected, ensuring fair representation and opportunities for marginalized groups. PR professionals are highly encouraged to prioritize DEIAB initiatives to create an inclusive environment, amplify diverse voices and build stronger relationships with a broader range of publics. Conscientious efforts abound to help public relations become more demographically diverse. See for example:

www.prsa.org/about/diversity-inclusion
www.fpra.org/fpra-diversity-equity-inclusion-task-force/
www.nspra.org/News/diverse-equitable-and-inclusive-communication-best-practices
https://prcouncil.net/advocacy/diversity-equity-inclusion/

Organizational leaders' and practitioners' use of language is an important contribution to DEIAB. See for example:

Bardhan, N. & Engstrom, C. (2021). The way PR leaders communicate about diversity, equity and inclusion matters. *Institute for PR.* Retrieved June 1, 2023, from https://instituteforpr.org/the-way-pr-leaders-communicate-about-diversity-equity-and-inclusion-matters/.

Key Definitions

This is by no means an exhaustive list of terms you should know or that you may see on the Examination for the Certificate in Principles of Public Relations. Be very familiar with terminology like the shortlist below and with the glossary of your preferred text from *The Bookshelf* but know that the Examination focuses on the application of principles. You will not be tested on whether you can match a word with its definition.

Activism: Organized action like education, community engagement, coalition building, protests, civil disobedience, etc., aimed at social, legal, political, economic, environmental, social justice or other forms of change, often with great passion and commitment. *Activists* are the people engaged with advocacy for change.

Actual malice is an additional standard for libel relating to public figures (celebrities, political figures, influencers and others who've chosen to place themselves in the public eye). The Supreme Court has defined actual malice as "actual knowledge that the statement is false or reckless disregard for the truth," making only those who *knowingly* or *recklessly* lie about public figures liable in defamation suits.

Advertising: Informative or persuasive messages placed in a communication delivery vehicle by an identified sponsor that pays for time or space. Advertising is a controlled method of delivering messages to defined audiences. The PESO Model™ uses the term paid media. Both terms reference anything that is PAID — e.g., product placement, influencer placement, sponsorships, social media boosts, events, TV commercials, etc.

Advocacy: The act of supporting a cause, group, organization, etc., to influence public opinion or to effect change.

Analytics: Metrics for web and social media that can reflect PR effectiveness. *Web:* monitoring traffic – the number of visitors to your website as their geographic location and how they arrived at your site, page views, bounce rates, session duration, click-through, conversion, time spent on the site, etc. *Social media:* engagement, reach, impressions, sentiment analysis, conversions, follower growth, click-through, demographics, sentiment analysis.

Artificial Intelligence (AI) in the context of public relations refers to the use of advanced algorithms and machine learning techniques to automate, streamline and optimize various PR processes. It involves leveraging AI-powered tools for media monitoring, sentiment analysis, content creation, social media management, personalization, segmentation, etc. AI helps PR practitioners efficiently gather insights, identify trends, personalize communication and make data-driven decisions, leading to more effective and targeted strategic communication. (Do you think this definition was 100% written by AI? Why or why not?)

Authenticity/Brand Authenticity: Genuine and transparent communication; alignment between what an organization says and what it does. Internal authenticity impacts employee advocacy.

Attitude: A cognitive predisposition, often unconscious, relating to likes and dislikes. Attitudes are affective, rather than rational; subjective, rather than objective; global or general, rather than specific;

and enduring, rather than easily changeable. Attitudes help people evaluate an object, situation or issue and may relate to behavior. Once attitudes are influenced, new behaviors may follow.

Awareness: Refers to familiarity with an organization and/or its products and services.

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

Benchmarking: Comparing products and services from one organization to those of competitors or those recognized as the "best in the industry." The goal is 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.

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 a 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.

Communication 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 the designated publics, what it is doing to foster that perception, and how it is actually perceived.

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 area(s) where an organization operates. Community relations involves dealing and communicating with citizens and groups within an organization's operating area.

Conflicts of interest occur when personal or organizational interests or relationships conflict with official responsibilities/decision-making authority, usually with some element of benefit for the decision-maker. Competing interests can impede or compromise fair or unbiased decision-making.

Content analysis: A study of publications, print, online and broadcast media reports, speeches, letters or other forms of "text" 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 or even automated in the form of the sentiment analysis metric common to media relations and social media management tools.

Controlled communication channels: Communication channels, media and tools that are under the direct control of the sender. Examples include paid advertising, newsletters, brochures, some types of emails, organizational websites and blogs, leaflets, organizational broadcasts and podcasts, intranets, teleconferences and videoconferences, meetings, speeches and position papers.

Content creation: Emphasizing the power of compelling storytelling and creating engaging content across various platforms to captivate audiences and build meaningful connections that ideally contribute to achieving organizational goals and objectives.

Conversion: Website visitors take a desired action — e.g., sign up for a newsletter, make a purchase, etc.

Convergence: The merging of various forms of media (print, broadcast, digital and interactive media); the integration of content, technology and distribution channels.

Corporate Social Advocacy refers to businesses actively using their influence, resources and platforms to support and promote specific social causes, public policies or reforms. It extends beyond individual philanthropy and includes participating in public debates, lobbying for policy changes and collaborating with stakeholders to advance social and environmental goals, aiming to drive positive societal change through corporate engagement.

Corporate Social Responsibility refers to the voluntary integration of social and environmental concerns into a company's business operations and interactions with publics, going beyond legal obligations. It involves the pursuit of sustainable development by balancing economic growth with social progress and environmental stewardship.

Counseling: The practice of advising management concerning policies, relationships and communications.

Coverage: Mentions of your organization or its products/services/people in newspapers, blog posts, podcasts, magazines, radio, television, online or other media. Practitioners monitor coverage either by reviewing media and "clipping" (the old way) or through different tools and software. Coverage is often classified as positive, negative or neutral and coverage reports demonstrate earned media or shared media.

Crisis communication: The strategic process of managing and responding to unexpected events or situations that have the potential to harm an organization's reputation and relationships. It involves timely and transparent communication, effective messaging and coordinated actions to mitigate negative impacts, restore trust and maintain organizational credibility during a crisis. Crises may involve emergencies/disasters as well as legal, ethical or financial situations and may occur in both the physical and digital realms.

Data analytics and measurement in public relations encompass the use of data-driven insights to inform decision-making and evaluate the effectiveness of PR campaigns. This includes utilizing tools and methodologies to gather, analyze and interpret data, measuring key performance indicators (KPIs), and demonstrating the value and impact of public relations efforts on organizational goals.

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

Disinformation: False information deliberately intended to mislead, misstating or misrepresenting facts with the intention to deceive or manipulate others.

Earned media: Third-party endorsement for your organization or client, whether from journalists and editors using information supplied via news releases or story pitches, sharing media coverage, writing reviews, posting or creating tutorials about your product/service, etc. This is not "free advertising." That's an oxymoron. It was earned through someone's effort, but it's uncontrollable because it's not paid for or created by you. This is a term used in the PESO Model™ (paid/earned/shared/owned).

Employee Advocacy: Employee advocacy focuses on empowering employees to be brand ambassadors and advocates for their organizations. This involves fostering a positive internal culture, developing communication strategies to engage and motivate employees, and leveraging their voices to enhance brand reputation externally.

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

Events (special events): Organized activities aimed at showcasing the organization and generating interest in a person, product or cause through a focused happening. They serve to achieve organizational objectives such as fundraisers, product launches and conventions. Event management involves planning and strategic execution, while event activation focuses on creating memorable experiences through interactive installations, live performances and on-site activities. Events can be proactive and promotional or responsive to crises and natural disasters.

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. Also known as investor relations or shareholder relations.

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

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

Gantt Chart: A project management tool in horizontal bar chart form 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. A Gantt Chart visually lays out the order in which tasks will be carried out. It can identify resources needed for each task. The chart always shows a start and finish date and may identify team member responsibilities.

Goal: Statement that spells out the overall outcomes of a program. Goals are usually a more specific expression of a mission or purpose and are directly related to the problem or opportunity at hand.

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

Historical (Archival) research: Collecting information that exists on the record. Sources include historical documents, personal papers, journals, official records and online databases.

Impacts: A term used in PR measurement to reference long-term effects and broader changes resulting from successful PR efforts that go beyond outcomes — e.g., brand reputation, enhanced credibility, increased trust, policy changes.

Impressions: The number of times content is viewed or heard by your target audience; it's an estimate of reach.

Influencer relations and brand partnerships: Influencer relations and brand partnerships refer to the practice of collaborating with social media influencers or other influential individuals to promote brands and products including the strategic selection, management and measurement of partnerships to leverage influencers' reach and credibility in reaching target publics and enhancing brand reputation.

Informal (nonscientific) research: Methods of gathering information that don't necessarily follow the scientific method and are usually subjective and exploratory. Informal research can look at values or qualities and is good for pre-testing formal strategies. Findings cannot be projected to represent an entire population. Informal research may provide an early warning signal about emerging issues and is often used to inform formal scientific research.

Inputs: A term used in PR measurement to refer to the resources, efforts and activities invested in a PR campaign or program — e.g., budget allocation, time spent, manpower, media content creation and other tangible resources used to execute the PR strategy.

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.

Key performance indicators (KPIs) are measurable values that provide quantifiable metrics to assess the impact of PR efforts and help in making data-driven decisions. Examples of KPIs in PR include placements, media mentions, impressions, sentiment analysis, share of voice, web traffic, social media engagement, conversion rates, awareness, recall, unique visitors per month, etc.

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.

Malinformation refers to the intentional dissemination of harmful and damaging information with the aim of causing distress or harm to an individual, organization, country or society.

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. These activities can include advertising, collateral materials, interactive communications, publicity, promotion, direct mail, trade shows and special events.

Material information: Information that is relevant and significant enough to potentially influence an investor's decision to buy, hold or sell a security. This applies to publicly traded companies and their obligations to disclose important information to investors and the public in ways that ensure transparency and prevent insider trading.

Media relations: Mutually beneficial associations between public relations professionals and journalists as a condition for reaching audiences with messages of news or features of interest (publicity). The function includes both seeking publicity for an organization and responding to queries from journalists about the organization. Maintaining up-to-date lists of media contacts and a knowledge of media audience interests are critical to media relations. Also see Press Agentry and Publicity.

Media mentions: The number of times your organization, brand or product is mentioned in various media outlets such as newspapers, magazines, online articles, broadcast segments, etc.

Metrics: Measurements; quantifiable measures or data points used to assess, evaluate and track the performance, progress or success of a particular process, project, organization or activity.

Misinformation: False or inaccurate information; not created with the intent to deceive or cause harm — i.e., getting the facts wrong.

Mission or mission statement: The overarching reason an organization exists; a visionary statement that can guide an organization's purpose and planning for many years. Example: To bring affordable transportation to the common person.

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

Objective: The measurable result that must be achieved with each public to reach the program goal. Objectives should be SMART (specific, measurable, attainable, relevant and time-specific) and may establish milestones toward a goal. Objectives should do the following:

- Address the desired result in terms of knowledge change, opinion change and/or behavioral outcome, not in terms of communication output.
- Designate the public or publics that should show the knowledge, opinion or behavior changes.
- Specify the expected level of accomplishment (knowledge, opinion or behavior change).
- Identify the time frame for these accomplishments to occur.

Omnibus survey or study: A quantitative research method that combines questions from several organizations into a research company's national or regional poll; also called subscription studies. Omnibus research is often less expensive than developing a stand-alone survey for an organization.

Opinions: Observable (verbal) responses or statements concerning issues or topics. Opinions are specific to a topic and time (situational and focused), rational (cognitive and objective) and changeable. Public opinion is often described as the composite opinion of all people who make up a public.

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 behalf. This public relations technique is often used to sway public opinion and move legislators to action. "Grasstops" organizing uses the same strategy but involves community influencers.

Outcomes: A term used in PR measurement to reference something that has happened as the result of a campaign. This could be a measurable change in awareness, knowledge, attitude, opinion, reputation metrics or even achieving financial goals (fundraising, sales).

Outputs: A term used in PR measurement to reference the material and activity practitioners generate through controllable (paid, owned) and uncontrollable (shared, earned) media.

Outtakes: A term used in PR measurement to refer to the specific responses, attitudes and perceptions of the target group after being exposed to a PR campaign or communication effort. These are intermediate measures lying between outputs and outcomes that help assess the effectiveness of the campaign and provide insights into how messages were received and understood.

Owned media: Communication vehicles or channels an organization owns/fully controls and for which it creates/manages content. Examples: organizational website, blogs, magazines, newsletters, videos, books, some TV programming, etc. Many people consider social media to be theirs because they manage the profile, BUT the users of Facebook, Instagram, YouTube, etc., don't technically own those channels — we're all publishing on their domains and using their tools. This is a term used in the PESO Model™.

Population: Individuals whose opinions are sought in a research study. 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. A sample may be drawn to reflect the population, which is sometimes called the sample 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.

Press agentry: Creating newsworthy stories and events to attract media attention and gain public notice (although not all this attention may be positive). Also see Media Relations, Promotion and Publicity.

Primary research: Investigation or data collected you do yourself or you hire someone to do for you.

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.

Problem statement: A concise and clear statement that identifies the specific issue or challenge an organization is facing and serves as the foundation for developing communication strategies and objectives. It defines the *problem or opportunity* that the PR campaign aims to address.

Promotion: Activities designed to win publicity or attention, especially the staging of special events to generate media coverage. Promotional activities are designed to create and stimulate interest in a person, product, organization or cause. Also see Media Relations, Press Agentry and Publicity.

Propaganda: Messages specifically designed to shape perceptions or motivate actions that an organization wants. The word was coined in the 17th century by the Roman Catholic Church and originally meant "writing to propagate the faith." The word took on negative connotations in the 20th century and is usually associated with lies, deceit and misinformation. Common propaganda devices:

- Glittering generalities (broad statements).
- Name-calling (vilify opponents).

- Transfer (guilt by association).
- Bandwagon (Everybody's doing it).
- Plain folks (anti-elitism).
- Testimonials (Cite a celebrity, an authority figure or "plain folks" to endorse a cause.).
- Card stacking (one-sided arguments).

Publics: Groups of people connected by some common interest or other identifying factor. Publics may identify themselves such as fans of a sports team or residents of a neighborhood, or be identified by a public relations planner: retired residents 60 to 75 who live within five miles of our store.

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

Public information: Information open to or belonging to the public. In government agencies, nonprofit organizations or colleges and universities, the task of disseminating information from the organization to the public. The process is usually done through mass or social media. Also see Media Relations.

Publicity: Information from an outside source that is used by news organizations because it has news value. Publicity is an uncontrolled method of placing messages because the source does not pay the media for placement and cannot guarantee if or how the material will be used. Also see Media Relations, Press Agentry and Promotion.

Qualitative research: Research that gathers impressions and feelings about topics or probes understandings of issues without relying on statistical methods. Researchers often use open-ended questions and free-response formats to investigate the value of programs, delve deeply into questions and explore the how and why of beliefs. Results are usually descriptive (not measurable), and analysis, while systematic, is usually subjective. The goal is often an in-depth understanding of an issue. Qualitative research may be exploratory. Examples: Focus groups, community forums, advisory boards, informal discussions.

Quantitative research: Research that can be numerically stated or compared and may use statistical standards. Researchers often ask close-ended or forced-choice questions. Responses are usually multiple-choice, true-false or agree-disagree. The analysis is highly objective. Results, if drawn from random samples of a population, may be projected to the total population.

Random sample: A form of probability sample; each person in a population has an equal chance of being chosen.

Reactive public relations: Response to crises and putting out fires defensively rather than initiating programs. Reactive public relations is practiced in various degrees. Some situations require the implementation of an organization's crisis plan. Also see Proactive Public Relations.

Readability: The ease with which a piece of text can be read and understood by the intended audience. It is determined by several factors including sentence length, number of syllables in words, vocabulary complexity, etc.

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

Reputation management: Systematic actions and messages designed to influence what people in key publics think about an organization. Reputation management has long been a function of public relations and is often a priority in crisis management. The increased use of the internet and related social networks has given added urgency to the practice. 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.

Research: Systematic information gathering to describe and understand situations, check assumptions about publics and make programming decisions. Research helps define the problem.

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

Return on Investment: A metric used to determine the profitability of any investment. To calculate ROI, divide *net income* by the *total cost of investment* x 100 because it's expressed as a percentage. $500 (amount made) / $50 (amount spent) = 10 x 100 = ROI of 1,000%.

Rhetorical triangle: Developed in ancient times by Aristotle and still proven today, the rhetorical triangle is a framework of the three key elements of persuasive communication: ethos (credibility), pathos (emotional appeal) and logos (logical reasoning); all three are present in the most effective persuasive communication.

Risk assessment: The determination and ranking of how likely certain emergencies or crises are to happen. Risk assessment is related to the larger function of risk management. It uses outcomes of risk assessments to plan and execute strategies to deal with such risks.

Risk management: The process of assessing risk and developing strategies to manage such risks.

Sample: A portion of a larger whole. In polling, a sample is a relatively small group of individuals selected to represent a population. If a census or a probability sample (such as random), responses from the sample may be generalized to the entire population.

Scientific method: Principles and procedures for the systematic pursuit of data through replicable observation and experimentation. Scientists formulate and test hypotheses; use methods that can be replicated; collect objective, empirical data; and compare results against established theoretical standards.

Secondary research: Using research findings of others or collecting information secondhand. Examples: National or regional studies, studies by trade associations used by members in the industry — e.g., Institute for PR — Census Bureau and other government publications, studies published by "think tanks" like Pew Research Center and much more.

Segmentation: The breakdown of an audience into demographic, psychographic or other dimensions. These divisions allow planners to adapt strategies, tactics and messages to audience needs or interests.

Sentiment analysis: A form of content analysis, usually enabled by AI, that assesses the sentiment (positive, negative or neutral) of media mentions or social media conversations related to an organization.

Share of voice: An AI-enabled metric that gauges the brand's visibility in comparison to its competitors.

Shared media: One of four categorizations in the PESO Model™ (paid/earned/shared/owned) that references communication channels where both your organization and the people you need to reach are active — e.g., social media platforms — and references content shared across third-party platforms, shared between multiple owners or that otherwise generates engagement. It is uncontrollable because the users share as they like and the owners have the final say over usage and content.

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

Social media engagement: Metrics of actions (likes, shares, comments, retweets, etc.) on social media posts. These help assess how well your content resonates with the audience.

Social media management: The ongoing process of planning, creating and scheduling content designed to grown the number of followers and nurture engagement across social media platforms to achieve organizational objectives. This includes, but is not limited to, online reputation management, social media content strategy and community management.

Social Networking: The practice of expanding one's social connections or business contacts through the use of online platforms that enable individuals to interact and share information in a virtual environment that facilitates the creation and maintenance of relationships among users based on common interests or personal connections.

Stakeholder: A person or group with an interest in an organization or cause, someone affected by an organization or someone who can affect an organization. The term sometimes refers to investors but includes others who are committed to — or otherwise involved with — an organization in a sense other than financial.

Storytelling: Crafting and sharing stories that resonate with the target publics to build connections, convey key messages or information, contribute to mutual understanding and help shape organizational reputation.

Strategic planning: A systematic and dynamic process that an organization undertakes to set priorities, define objectives, make informed decisions and allocate resources effectively to achieve long-term goals and fulfill its mission.

Strategic thinking: Formulating plans for achieving goals.

Strategy: The overall concept, approach or general plan for a program designed to achieve objectives. Each objective can have multiple strategies. General, well-thought-out tactics flow from strategy. *Strategies do not indicate specific actions to achieve objectives.* Examples: Use communication vehicles that can be understood by a public with limited education to demonstrate that riding public transportation to work is an attractive alternative to driving.

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

Tactics/tools: The exact activities and methods used at the operational level to implement a strategy and reach an objective. By helping achieve objectives, tactics, in turn, support goals that have been set to carry out the mission or purpose of the organization. Tactics/tools involve the use of selected personnel, time, cost and other organizational resources. Examples: Design, produce and distribute radio, television, print and online public service announcements. Conduct a "Why I'd rather be riding" essay contest.

Trend analysis: Tracking and analyzing trends in news coverage, online activity, marketplace events and the overall environment 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 evaluate. Researchers assess external and internal validity. External validity refers to the extent to which the 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.

Uncontrolled communication channels: Uncontrolled communication channels refer to message delivery methods that are not under the direct control of the company, organization or sender of messages. These channels include newspapers and magazines, radio and television, external websites, externally produced blogs, and social media commentary, externally developed news stories, product reviews, even the social media profiles themselves (administrators of social media pages, not owners).

UVM (unique visitors per month): UVM is a strictly digital metric that calculates the sum of unique devices visiting a publication's domain in a month.

A Few Online Dictionaries/Glossaries (beyond *The Bookshelf*)

Public relations

Stacks, D.W, & Bowen, S.A. (2013). *Dictionary of Public Relations Measurement and Research, 3rd. ed.* Retrieved July 1, 2023, from https://instituteforpr.org/wp-content/uploads/Dictionary-of-Public-Relations-Measurement-and-Research-3rd-Edition.pdf.

Other

Marketing Standards Accountability Board. (n.d.) *Universal Marketing Dictionary.* Retrieved July 1, 2023, from https://marketing-dictionary.org/.

The News Manual (2019). *International journalism and media glossary.* Retrieved July 1, 2023, from http://www.thenewsmanual.net/Resources/glossary.html.

RPIE: The four-step process of public relations (45%)

The Universal Accreditation Board, which oversees both the Certificate in Principles of Public Relations and Accreditation in Public Relations, prefers the acronym RPIE to describe the four-step process of public relations: **Research** → **Plan** → **Implement** → **Evaluate**.

Different authors and different organizations use different acronyms, so you could see it written slightly differently, for example:

- RACE: Research and planning, Action, Communication, Evaluation.
- ROPE: Research, Objectives, Programming, Evaluation.

- DASA: Detecting, Analyzing, Strategizing, Acting (see recent recommendation by the Commission for Public Relations Education, www.commissionpred.org/wp-content/uploads/2023/11/CPRE-50th-Anniversary-Report-FINAL.pdf).

Tip: RPIE is a sequenced process. Start at the beginning. Don't rush to solutions or jump into tactics before you have done adequate research, determined key publics and set measurable objectives.

Tip: Don't think of RPIE as some ambiguous, academic concept. RPIE is a process that you probably use all the time. Even something as simple as planning a weekend trip with your friends involves RPIE (1. Research = destination, cost, activities, etc. 2. Plan = make decisions and arrangements. 3. Implement = go on the trip. 4. Evaluate = how'd it go?; what would you do differently next time?). RPIE essentially formalizes a WAY OF WORKING that leads to effectiveness and continuous improvement. RPIE is everywhere.

Examination KSAs

These are the four-step process (RPIE) KSAs (knowledge, skills and abilities) that make up 45% of the Examination's weighting:

- **Research (concepts):**
  - Understands and can apply primary and secondary, formal and informal, quantitative and qualitative methods. Understands a premise and research plan.
  - Decides on the population and sampling techniques. Designs instruments, etc.
- **Research (applied):**
  - Uses a variety of research tools to gather information about the employer or client, industry and relevant issues.
  - Seeks to learn about stakeholders' understanding of the product, organization and issues.
- **Stakeholder analysis:**
  - Identifies institutions, groups or individuals who have an interest in or are affected by some part of the program.
  - Assesses the interests of influential institutions, groups and individuals.
- **Diversity:**
  - Identifies and respects a range of differences among target audiences.
  - Researches and addresses the cultural preferences of the target publics.
  - Understands culturally and linguistically appropriate strategies and tactics.
- **Analytical skills:** Objectively interprets data. Applies research findings.
- **Audience identification and communication:**
  - Identifies appropriate audiences and the opinions, beliefs, attitudes, cultures and values of each.
  - Prioritizes and properly sequences communications to different audiences.
- **Planning and implementation:**
  - Understands public relations programs based on research methodology or approaches that address the following components: Research, Goals, Planning, Execution, Monitoring and Evaluation.

- **Evaluation of programs:**
    - Determines if the goals and objectives of the public relations program were met and the extent to which the results or outcomes of public relations programs have been accomplished.

Successful public relations programs require proactive strategic planning. This planning includes measurable objectives, is grounded in research and is evaluated for return on investment. Because strategic planning is such a critical requirement for the public relations profession, questions on the RPIE process make 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.

How the four-step process is assessed on the Examination

The Examination's scenario questions require you to apply your knowledge, skills and abilities and your understanding of the four-step process to arrive at the most appropriate answer.

These "questions to ask yourself" as you prepare for the Examination are largely adapted from Texas Public Relations Association's 2006 APR Jumpstart using "Effective Public Relations" as its source material. It was updated by Sharee LeBlanc Broussard, Ph.D., APR.

Questions about RESEARCHING to consider when preparing for the Examination:

- 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 and quantitative?
- Do you know how to apply definitions, examples and characteristics of different types of research?
- Do you understand the time and budget constraints for various methodologies?
- Are you familiar with the sample size?
- Costs, characteristics and delivery methods 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.

Questions about PLANNING to consider when preparing for the Examination:

- Publics:
    - Are you able to identify and prioritize publics and segments of those publics? For instance, employees are a public; management is a segment of the employee public.
    - Some publics are more important than others. Can you select the most important public from a brief scenario? Do you know why this public is important?
    - In determining the most important publics, ask whether the 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 these four terms? Can you apply these concepts? In the Examination, 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:
    - *Weak*: Enhance our public image.
    - *Stronger*: Improve recall of 10 important facts about our organization — from three to five among key media representatives by June 1 of next year.
    - *Weak*: Improve media relations.
    - *Stronger*: Increase positive coverage on 10 key issues from 60% to 70% by the end of the year.
  - Examples of strategies:
    - Strategies include the use of social media, media relations, public engagement, employee engagement, third-party endorsement and opinion leaders' interactions.
    - Strategies may call for celebrating success among early adopters, positioning the organization or its products, correcting or clarifying positions, fostering viral online communication or delivering specific information to certain decision-makers.
  - Examples of what is not a strategy:
    - Scheduling a news conference, sending a newsletter, hosting a meeting (or series of meetings), writing a news release or planning a special event. These are tactics.
- Messages and spokespersons:
  After reading a very brief scenario, could you identify the most appropriate message and/or spokesperson? This level of knowledge can be developed in two ways: 1) professional experience and 2) studying others, e.g., case studies in textbooks or the trade press.

  The following principles guide our professional judgment in message development and identification of a spokesperson (and many other decisions):
  - Public relations' responsibility to act in the public interest.
  - Ethical values of honesty, accuracy, fairness and full disclosure.
  - Ethical responsibility to our client or employer.
  - Organizational mission, values, goals and objectives.
  - Plans or program objectives to influence awareness, opinions or actions.
  - Desire to build mutually beneficial relationships.
  - Spokesperson's credibility, prestige and likeability among key publics.
  - The needs, interests, values and concerns of key publics.
  - Key publics' perceptions of risks and threats.
- Tactics and tools:
  After considering a range of options, could you determine the most appropriate use of tactics? Could you identify those that should be included in a plan? Criteria to consider in evaluating tactics include:
  - Available time and resources.
  - Ability to reach and influence key publics to achieve desired objectives.

- Compliance with ethical and legal guidelines.
  - Return on investment.
  - Multiple methods and 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 and out-of-pocket expenses such as printing, postage, web design and website hosting?

Questions about IMPLEMENTING to consider when preparing for the Examination:

- How do you manage/organize multiple people working on the same project and keep them on time/on task and within budget?
- How will you monitor the success of the campaign/project during implementation?
- What processes could be in place for quality control in implementation?
  - Are the materials produced useful to your target publics and will they catch attention?
  - Is creativity evident?
  - Are you keeping up with trends?
  - Is the work free of errors and does it conform to appropriate style or specifications?
  - Is readability at the appropriate reading level?
  - Has DEIAB (diversity, equity, inclusion, access, belonging) been considered and is evident?

Questions about EVALUATING to consider when preparing for the Examination:

- Are you able to judge appropriate uses of evaluation? Can you link evaluation to specific publics 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 tools.
  - Outputs, outtakes, outcomes and impacts are different. Outputs and outtakes are measures of execution and strategy. Outcomes and impacts are measures of achieving objectives.
  - Measurement should be included in the plan and budget. (Otherwise, assessments won't be done.)

Step 1: Research

The RESEARCH part of RPIE is first because it is the foundation of all public relations work. Practitioners need a firm understanding of the situation and the publics before planning or implementation can occur, but research is present throughout the four-step process.

Research is the systematic gathering of information to describe and understand a situation, define or check assumptions about publics and perceptions, gain insight, make informed decisions, and check public relations outcomes.

Tip: Don't just jump into conducting new research. ALWAYS begin by assessing what you have/where you are. Then determine what else you may need to inform the work or make good decisions. Next, progress to what you can find (look up). Finally, conduct new research as necessary.

Consider/Determine:

- WHO do we want to reach?
- WHAT do they already think/feel/do?
- WHAT do we want them to think/feel/do?
- WHAT messages do we want to communicate to each public that will:
  - Increase knowledge?
  - Change opinions?
  - Encourage desired behavior?
- What decision will be made from research results, and what information is required to support the decision?
- What resources are available for information gathering?
- What other parts of your organization — or other organizations — have already done research you could use?
- Does sample selection give you an accurate assessment of your target population?
- How big is your sample and universe/survey population?
- How will you collect data — in-person, 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?
- Will the results be used internally only, or will the results be made public?
- How will you tabulate answers?

Understand what you're undertaking: Classifications of Research

A simple way to understand research classifications is to think about: What's being done? How is it being done? Can it be replicated?

- What type of method?
  - **Qualitative** (open/probing questions; yields rich data; uses smaller samples; often done first; requires a greater time commitment).
  - **Quantitative** (hard data; larger samples; requires less time).
- How is it being gathered?
  - **Primary** (Gather it yourself.).
  - **Secondary** (Look it up.).
- Can someone else replicate what you've done and get the same/similar results?
  - **Formal research** follows rigorous scientific method and should be replicable. Examples: poll (survey); experiment; should be replicable.
  - **Informal research** does not follow rigorous scientific method and is not replicable. Examples: interview, focus group, audit, etc.; can't be replicated.
- Research purposes have different names:
  - **Exploratory research:** Type aims to explore and understand a topic or problem when little is known about it.

- **Descriptive research:** Detailing and explaining something; like creating a snapshot of what's happening, who's involved and when.
- **Formative research:** Shapes/refines a project or strategy before it's fully developed (like a quiz in classes).
- **Summative research:** Assesses and evaluates the overall impact or effectiveness of a completed project, program or initiative (like a final or term paper in classes).

Scientific Method

Tip: If you've done a science fair project, you're familiar with the scientific method.

The scientific method **follows a series of steps** to test the validity of a concept. The scientific method is **self-correcting** —changes in thought or theory are appropriate when errors in previous research are discovered.

Scientists changed their ideas about Saturn after information gathered by Voyager spacecrafts revealed errors in earlier observations. In communication, researchers discovered that an early perception of media's power to influence behavior directly was incorrect. After numerous research studies, communication scholars concluded that a combination of social, psychological and communication variables affect behavior and ideas, and that people can react to the same message in different ways.

Science tries to provide more reliable answers to questions than those offered by other generally used ways of knowing, such as intuition.

To the extent that you can use the scientific method for decision-making in public relations management, you can elevate the public relations function from an intuitive, artistic enterprise to a strategic part of an organization's management. In the strategic approach, research is at the core of how the function is managed.

In strategic public relations, research is implemented to accomplish the following:

- Define the problem or situation to develop a public relations program.
- Monitor program implementation for performance accountability and strategic adjustments.
- Measure program impact or effectiveness concerning goals and objectives.

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 results.

7. Present results in appropriate form.
8. Replicate the study (when necessary).

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

Research Methodologies Commonly Used in PR

When people think "research," both surveys and focus groups come to mind, so those are covered here, but there are many more ways to conduct research and gather the information needed to define the problem or audience, make good decisions, monitor effectiveness and measure success.

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 address your research objective without threatening the people you are surveying. Surveys can be mailed, emailed, telephoned, asked in person or completed online. The techniques used for these different survey formats vary widely.

Survey Advantages

- Planned correctly, a survey makes participation easy.
- 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 disturbing subject matter.
- Survey answers can be quantified and analyzed by a computer and tabulated rapidly in multiple ways.
- You can pre-distribute a product and follow up with a survey.
- Surveys can be used in a variety of forms: in-person interviews, written documents, telephone questionnaires or online forms.

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 ask open-ended questions, tabulating will be labor- and time-intensive. Statistical analysis will be difficult.
- People can easily give habitual responses.
- People don't necessarily respond to questionnaires.
- Costs to mail a survey, provide return postage and offer incentives for completing the questionnaire can be expensive.
- People won't write a lot.
- People can and do lie.
- If open-ended questions are not specific enough, 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 or sensitive. Personal interviewing ensures the greatest control over data collection. But personal interviewing is the most expensive approach and is used less frequently than many other methods.
- Web or online surveys are easy to distribute, convenient for respondents, provide immediate electronic tabulation of responses and cost little to produce. Disadvantages include challenges securing email addresses, low delivery rates because of spam filters, low response rates because of email overload, a generally impersonal process, and ease of deleting the survey invitation or leaving a partially completed questionnaire with a mouse click.
- Use a telephone survey for basic, well-defined opinions.
- Mail surveys are the most effective for well-defined concepts and specific, limited answers. Mail surveys rarely produce high response rates, and response sources are often hard to determine.

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 that put items into a top-to-bottom order are useful.
- Opinion measurement or “agree” or “disagree” questions can be used. Often these questions are offered on a multipoint continuum known as a Likert Scale.
- Verbal/Numbered scale questions in a Likert Scale are best for determining the 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.

Questions, Data and Analysis

The type of question asked and the kind of data collected make a difference in the analysis. "NOIR" (the French word for black) is an easy way to remember levels of data, lowest to highest. **N = nominal** (naming data) is the lowest level — e.g., like numbers on sports jerseys — these only identify, so you can't add, subtract, multiply or divide those numbers and have the results mean anything. You can use these in analysis for comparison or hypothesis testing (Are responses different by ZIP code? or by gender? 1–female, 2–male, 3–other preferred descriptor). **O = ordinal** (ranking data) — e.g., self-described language level: beginner, intermediate, fluent — there's an order, but how different the points are between them is unknown. You can do both descriptive and inferential statistics with ordinal data, but they're a little less powerful than the highest levels, **I = interval** and **R = ratio** (scale data). These both have an order and equal distance between points, but ratio has an absolute zero point and interval does not. You can ask age by category (ordinal) or by scale (enter a number), the second way is more powerful/precise. Statistically, you can do the most with scale questions.

Why does this matter? Because it's important to think about what you'll do with the data and what analysis you'll run on the responses BEFORE the survey questions are finalized.

How Many To Survey?

Formulas for determining sample size are complex, but the calculations have all been done. Why use sampling? Back in the early 20th century, when pollsters hand-calculated survey responses, they noticed that the data batches repeated themselves at certain points if the sample was selected well enough; therefore, they realized that sampling saves time and money. Tables for required sample sizes are easy to find in textbooks and on the internet. There are even free sample size calculators. See for example: www.qualtrics.com/blog/calculating-sample-size/ or www.surveymonkey.com/mp/sample-size-calculator/.

Generally, the smaller your population, the larger your sample needs to be (pop. 200/sample 132; pop. 500/sample 217; pop. 100,000+/sample **384**. The U.S. has a population of about 300 million and most national polls have sample sizes of 1,500 to 2,000).

Types of Samples

- *Census:* A 100% sample. Identify all people in your universe and allow each one to respond. Censuses are especially useful with small and well-defined populations. If your universe numbers less than 300, consider a census.

- *Probability samples:* A systematic sample drawn in such a way that the probability of being chosen is equal or is known. A random sample is a good example. In a random sample, all members of the survey population have an equal chance of being chosen.

- *Nonprobability samples:* An informal selection of people to be interviewed.
  - *Convenience or accidental samples:* Participants are selected based on ease of access or availability, instead of a random or systematic method. Examples include dropping by a shopping center to ask questions of whomever you find or doing a quick social media poll.
  - *Quota samples:* Participants selected to meet specific demographic or characteristic quotas. For example, in a school, find 10 elementary teachers, 10 middle school teachers and 10 high school teachers. Any 10 of each kind.
  - *Dimensional samples:* Participants chosen based on specific dimensions or criteria relevant to the study. For example, 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 samples:* Participants referred by initial participants in a chain-like fashion. For example, 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 the names of others. You then proceed in successive waves of questioning to find the universe you desire.
  - *Purposive samples:* Participants are selected deliberately based on specific criteria or research objectives. Examples: 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 industry and contact corporate officers identified in annual reports of selected companies.

Nonprobability sampling is easier and faster than probability methods. While nonprobability samples can give you quick clues about a group's opinions or behaviors, results cannot be projected onto the universe. Probability sample results can be considered representative of the total population that interests you.

Sample Size and Accuracy

The table below shows the effect of sample size on survey accuracy from a random sample. The list is for populations of 100,000 or more. A random sample of 384 from such a population will yield a confidence level of 95% with a margin of error of plus or minus 5%. The confidence level means that 19 chances in 20 the true result will be within 5 percentage points (plus or minus) of the survey result. If you wish to reduce the margin of error, you must enlarge the sample substantially. To achieve a plus or minus 4% margin, the sample must be nearly doubled to 600. To lower the margin of error by another point to plus or minus 3%, 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. Plus or minus 5% is often regarded as sufficiently accurate.

Sometimes researchers oversample for greater reliability 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.

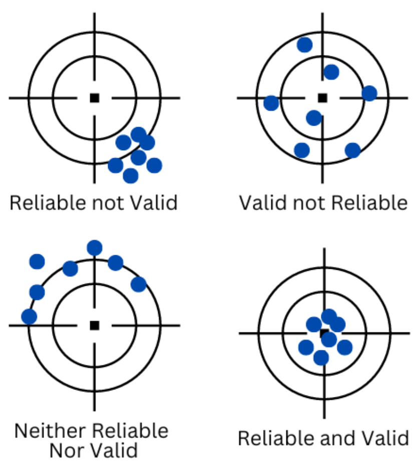
Limits of error + or -	Sample Size for a population of 100,000+
.25%	153,658
.50 %	38,415
.75 %	17,073
1 %	9,604
2 %	2,401
3 %	1,067
4 %	600
5 %	384
6 %	267
7 %	196
8 %	150
9 %	119
10 %	96
15 %	43
20 %	24
25 %	15
30 %	10
35 %	8
40 %	6

Based on information from Henry Milam, Ph.D., APR.

Reliability and Validity

In research, the questions together (the instrument) should point to what the researcher is interested in knowing and results should be consistent from application to application.

Validity means that the instrument measures what it's supposed to measure. **Reliability** means that it does so consistently — think about these like aiming the questions at a target:



Focus Group Research

What Are Focus Groups?

Focus group interviews are focused discussions led by a moderator and involving eight to 12 participants. Focus groups are a form of informal, *qualitative* research.

Why Do We Use Focus Groups?

- Focus group interviews help us explore feelings people have for a given product, service or idea. Group discussions 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. Group comments 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 the benefits of a product, service or concept.
- Focus groups are helpful in identifying what benefits some publics may 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. Clients like the direct contact. They may trust relatively unstructured, verbatim responses more than numerical data from surveys.

Uses With Surveys

- Before a survey – Because of their power to reveal how people express feelings and ideas, focus groups are useful before surveys. Group results help expand understanding of what needs to be researched and help identify language for survey questions. Focus groups give researchers and clients overviews of trends, themes, issues and points for survey questionnaire design.
- After a survey – Focus group interviews are useful after a survey to explore in-depth findings or trends that may be observed in the analysis of quantitative results.

Limitations of Focus Group Interviews

- Because they are qualitative research, not quantitative, focus groups cannot be used to measure human behavior statistically.
- Individuals interviewed may be drawn at random from the population to be studied, but their numbers are too few to offer any statistical assurances of the validity and reliability of their comments.
- One focus group reveals the feelings of only the people in that one group. As a result, you should conduct at least two focus groups for a given market or public. Subsequent groups allow you to see if comments and behaviors observed in the first group are repeated. Such replication gives evidence that the feelings may be common in the population being studied. The second focus group often provides additional insights and helps avoid a group bias that might result from a line of reasoning that some comment in the first group may set into motion.

Based on information from Henry Milam, Ph.D., APR, and Ferne G. Bonomi, APR, Fellow PRSA.

Content Analysis

With AI assistance, content analysis is extremely common in public relations as positive/negative/neutral "sentiment analysis" in the metrics of media relations, social media management and social listening tools, but it's more than that.

What Is Content Analysis?

Content analysis is the objective, systematic and quantitative description and evaluation of manifest content in print/online/broadcast media or other material. In content analysis, we attempt to objectively code and describe the content of communication to identify messages that the publics have received, or look for trends that public relations efforts should address. 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 messages delivered by different media such as television or social networks versus newspapers.
- To study trends or changes in the content of a medium over time.
- To analyze international differences in communication content.

Based on information from Ferne G. Bonomi, APR, Fellow PRSA, and Henry Milam, Ph.D., APR.

Experiments

In social science experiments, researchers manipulate one or more variables and observe their effects on participants or the social context. These experiments aim to determine causation, uncover patterns and contribute to our understanding. **A/B Testing in social media management is a form of experimentation.** A/B testing compares two or more variations of a social media element (e.g., an ad, a post or a landing page) to determine which performs better in achieving a specific goal such as higher click-through rates or engagement. It is a form of experimentation because it systematically tests changes in variables (e.g., headlines, visuals or call-to-action buttons) to identify what drives more favorable user responses. By comparing outcomes from different versions, social media managers can make data-informed decisions to optimize their content and adjust strategies.

Table of Research Types Commonly Used in Public Relations

The type of research selected depends largely on the type of campaign. Remember that research is selected not by budgets, but by what is the most appropriate form of research for a given public relations issue.

Adapted from an APR research presentation by Albert Tims, Ph.D., University of Minnesota for the PRSA Minnesota Chapter.

Method	Formal	Informal	Primary	Secondary	Advantages	Disadvantages

Focus groups		X	X		Speed. Efficient for qualitative data gathering. Ability to explore associations, relationships and reactions. 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. Can't generalize from results. Limited content domain. Information obtained is subjective. Results cannot be charted and graphed. Management may not accept results as well as executives might accept survey data. Good results depend heavily upon the experience and objectivity of the person conducting the focus groups.
Intercept interviews		X	X		Ability to target a geographic location or demographic group. Ability to clarify or probe responses. Can use supporting materials.	Limited in length and scope.
Telephone surveys based on random sampling	X		X		Speed of administration. Ability to clarify and probe. No geographic limitations. No sampling limitations. Accepted as industry standard.	Requires professional phone bank. Cost. Limited in length and scope. Caller ID allows respondents to screen calls and reduce the response rate. Not good for rankings, paired comparisons and evaluation of messages. Possible skew in favor of older respondents because many younger people don't have landlines. Random-digit dialing can't reach cell numbers.
Mail survey	X		X		Can be internally administered. No cost differences based on geography. Can use rankings and comparisons. Can do message evaluations. Can be included in existing communication tools. Convenient for respondents.	Slow to completion. Considerable time/labor commitment for data entry. Limited control over who completes. Little ability to clarify question wording and meanings. Limited ability to use filter questions. Sample limitations. Cost can be high if response rates are low. Often yields very low response.

Online/ email 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 easily for analysis.	Best with known populations. Requires access to technologies. May be difficult to generalize to larger groups or populations. Requires disciplined administration and the ability to randomly sample from within the universe to qualify as formal research; most often is informal.
Content analysis	X	X	X		Can apply the same scientific sampling methods used in social surveys to establish reliability and validity. Relatively low cost. Easy to replicate, extend over time, sources. 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 is often limited to comparative descriptions or profiles.
Communications audit		X	X		Assesses PR activities' alignment with organization goals. Can provide a 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 survey 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 the 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 survey 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.

Complaints, reviews		X	X		May provide a direct measure of impact objectives. Provides early warning of emerging issues. May provide baseline data on attitudes and perceptions. Provides a foundation for formal research.	Limited ability to project onto greater population. Validity is reliant on the accuracy/completeness of the collection process.
Tracking calls, purchases, hits, actions, placements		X	X		May provide a direct measure of impact objectives. Provides early warning of emerging issues. Collects information on the performance of a campaign. May measure effects on attitudes, behaviors and perceptions.	Limited ability to project onto a greater population. Should be combined with other research methods.
Observations, visits, field reports		X	X		Ability to probe for insight. Easily/quickly accessible. Provides a foundation for formal research.	Limited ability to project onto a greater population. Geographic limitations. Low inter-rater reliability.
Advisory panels		X	X		Ability to probe for insight. Easily/quickly accessible. Provides a foundation for formal research.	Limited ability to project onto greater population.
Community forums		X	X		Ability to probe for insight. Provides a foundation for formal research.	Difficult to assemble representative sample. Limited ability to project onto a 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 and accuracy. Assessment is limited to output objectives not impact objectives.
Research databases (such as 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 databases. 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 and quality. May be time consuming (especially for pre-2000 public records).
Internet/ social media research	X	X		X	Directly answers questions. Contributes to insights. Provides foundations for primary research.	Needs to be evaluated for completeness, accuracy, quality.

RESEARCH: Additional Resources (beyond The Bookshelf)

Lindenmann, W. K. (2001). *Research doesn't have to put you in the poorhouse*. Institute for Public Relations. Retrieved Sept. 6, 2023, from https://instituteforpr.org/research-savings/ .

Paine, K.D., Draper, P., Jeffrey, A. (2008). *Using public relations research to drive business results.* Institute for Public Relations. Retrieved Sept. 6, 2023, from https://instituteforpr.org/wp-content/uploads/UsingResearch_DriveBusiness.pdf.

KEYS TO RESEARCH

- Clear research question/hypothesis/problem definition — what are you trying to accomplish?
- Robust design and methodology — choose the right tool(s) and apply it correctly.
- Thorough data analysis and interpretation — use appropriate techniques to derive meaningful insights.
- Research helps understand audiences/publics, develop messaging, analyze competitive landscapes and evaluate the success of public relations efforts.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Research methods worksheet.
- Encountering PR "In the Wild" (focus on research).
- Build confidence in KSAs: Research.

Step 2: Plan

The planning part of RPIE is second. Plans can look different — some are tables, some are bulleted lists, some are graphics and some are really thick books. The important thing is that they're created and used. Plans help teams to work toward common goals, knowing how they'll get there and measuring how successful they were — e.g., Did we do what we said we would? Did we get the results expected?

There are different ways to plan, but the recommended STRATEGIC PLANNING method in PR is to determine goals, publics, objectives, strategies, tactics and activities that enable practitioners to fulfill their role as advocates communicating on behalf of the organizations they represent. The planning process essentially breaks something big and potentially scary into STEPS or CHUNKS so that doing X leads to Y being completed.

The Problem (Opportunity) Statement

"If you don't know where you're going, any road will get you there," – Lewis Carroll.

PR practitioners are most effective if they have a concise and clear statement that identifies the specific issue or challenge an organization is facing and serves as the foundation for developing communication strategies and objectives. The **problem statement** defines the problem/opportunity that the PR campaign aims to address. It's usually part of the **situation analysis**, which is a brief summary of the situation as it is now: background information, stakeholder analysis, SWOT analysis, competitive analysis, market research, media and communication audit, legal considerations, crisis preparedness, budget assessment, technology evaluation, cultural and social factors, environmental considerations, etc., to provide a comprehensive understanding of the PR landscape.

The problem statement should be written in the present tense and not imply blame or a solution. The statement typically answers these specific questions:

- What is the source of concern?
- Where is it a problem?
- When is it a problem?
- Who does the problem involve or affect?
- How have those people been involved or affected?
- Why is this situation a concern to the organization and its publics?

Some people get hung up on the word "problem" and may therefore use the term "opportunity," or maybe can't get past the semantics. Keep in mind that what you're trying to do is clearly define or clearly state what you're working to overcome or working toward. This can be hard to do — you're not likely to be successful if you can't wrap your brain around what you're trying to do. Successfully creating a problem statement is sort of like Harry Potter naming Voldemort (he was the only one who could do it/he was the only one who could defeat him).

Goals

Goals are broad, global, future statements of "being" and they may be long-term (12 months or more to achievement). Goals may include how an organization is uniquely distinguished in the minds of its key publics.

Example goals:

- To become a recognized leader in our industry.
- To raise $1 million to complete project name.

Notice these are not opinion-type or pie-in-the-sky statements; whether they're achieved can be measured.

Publics *(Who?)*

As stated above, **publics** are groups of people tied together by some common element. How do you define them?

PR practitioners need to clearly define the groups with whom they need to foster mutually beneficial relationships and include WHO they're attempting to reach, ideally in each objective.

Objectives *(What?)*

Objectives are the first level of steps that, if achieved in the shorter term, will help you reach your longer-term goal(s). Objectives define the WHAT (opinion, attitude or behavior) you want to achieve from WHO (your defined public) by WHEN. Well-written objectives are the key to a plan's measurability — e.g., Was the objective met or not?

To get the *what, from who, by when* into one sentence means that objectives need to be **SMART:**

- ***S****pecific* (both as to the action to be taken and the public involved)
- ***M****easurable*
- ***A****ttainable*
- ***R****elevant*

- ***T**ime-bound*

Objectives establish standards for assessing the success of your public relations efforts and there are different types:

- **Output objectives** specify activities practitioners undertake to ensure the success of the program. These help monitor work but have no direct value in measuring the effectiveness of a campaign — e.g., issue 10 news releases during the month or post to social media three times per day.
- **Outcome objectives** specify what the target public should think, feel or do — e.g., changes in awareness, opinions, behavior or support. Outcome objectives require high-level strategic thinking.

As Seitel explains in his textbook, "The Practice of Public Relations," practitioners should "differentiate between measuring public relations *outputs*, generally short-term and surface (e.g., amount of news coverage, number of blog posts) and measuring public relations outcomes, usually more far-reaching and carrying greater impact (changing awareness, attitudes and even behavior)," (2020, p. 145).

Objectives need to be tight and clear. They often begin just with a verb or with TO and a verb and include an object, a unit of measure and a timeline. Think of the perfect objective like one fill-in-the-blanks sentence:
____ (TO ACHIEVE WHAT) from ____ (WHO) ____ (HOW MUCH) by ____ (WHEN).

Examples of Objectives:

- To increase newsletter click-through downloads of our product coupon by 25% from October levels by Dec. 31.
- Secure a minimum of 15 positive media placements in high-profile industry publications (UVM above 1 million) within three months of product launch.
- To attain a 20% increase in positive employee sentiment scores on regular employee survey metrics related to internal communication by the end of the third quarter.
- Expand brand awareness among millennials by achieving a 30% growth in social media followers from that demographic within the next six months.
- To increase ridership of public transportation in the Los Angeles metropolitan area (behavioral outcome) by 8% (level) among workers earning less than $25,000 per year (public) within the first six months (time frame) of the communication program.
- To have at least 10% (*level*) of a randomly selected sample of public transportation riders in the Los Angeles metropolitan area (*public*) identify one public relations campaign communication tactic as their reason for using public transportation (*behavioral outcome*) by the end of the second year of that campaign (*time frame*).
- To have confirmed reports that 50% (*level*) of the natives of one Asian, one African and one South American developing country (*publics*) are applying multiyield agricultural practices (*behavioral outcome*) by 2023 (*time frame*).

Strategies (How?)

Strategies provide the road map to your objectives; they describe HOW to reach the objectives.

Communication strategies involve determining what to communicate, to whom, when and through which channels. *Examples:* message development, message distribution through which channels (*paid* like sponsorship or advertising, *earned* like media relations, *shared* like Tik Tok or Facebook, *owned* like website, magazine or newsletter).

Action strategies focus on HOW to execute the practical implementation of initiatives and projects. *Examples:* product launch plan, event management, sustainability or inclusion initiatives

Strategies may include language like:

"enlist community leaders to…,".
"accelerate involvement with…,".
"position the company as …".
"form strategic partnerships with … ."

Tactics/Activities (What to do.)

Tactics are specific elements of a strategy or tools for accomplishing a strategy.

Examples include meetings, publications, product tie-ins, community events, news releases, online information dissemination and social networks.

Activities are details of tactics that often indicate who's doing what, when things are due, etc.

10-point planning sequence

These 10 points help build an RPIE plan.

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

1. Overall goal(s)
    - Limit goals. Identify no more than three to five. One may be enough.
    - Make public relations goals consistent with management goals and mission.
    - Think in terms of end results, not process alone.

2. Target Audiences
    - Identify groups or subgroups 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, opinion or action you desire — not the process (tactics you will use) but the end result.
    - Articulate objectives with verbs that reflect changes in awareness, opinion, or behavior: recognize, acknowledge, know (awareness); favor, accept, oppose, think (opinion); 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 a public, outcome, attainment level (%) and time frame. (Example: To have 65% of employees in a carpool or ride-share program at the end of six months.)
- The same objective may fit a number of publics, but strategies may need to be different.
- Consider what position you want to occupy in the mind of your key publics. How should the organization, product, issue or cause be known or perceived by each public, and how will that position be distinct?

4. Strategies
   - The military definition of strategy 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 public relations planning, the strategy explains *how* you will approach the challenge of working toward your objectives. On what can you build or take advantage of 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.
   - Strategies 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 of strategies include media-relations campaigns, gaining third-party endorsements and public engagement efforts.

5. Tactics
    - Tactics are specific ways you will use your resources to carry out your strategy and work toward objectives.
    - You can have several tactics per strategy.
    - Some plans stop with tactics and omit details 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
    - How will you determine if you are reaching objectives?
    - How will you monitor feedback?
    - What will you measure or observe, and how will you do that?

8. Materials
    - What do you need to implement/execute tactics?

9. Budget
    - Include staff time, volunteer energy and out-of-pocket costs (expenses for transportation, images, materials and fabrication).

10. Timetable/Task List
    1. Who does what when? Work backward from the deadline or forward from the start date.

Tips: Know the 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. ("Effective Public Relations 11th," p. 277).

PLANNING: Additional Resources (beyond The Bookshelf)

Anderson, F.W., Hadley, L., Rockland, D., Weiner, M. (2009). *Guidelines for setting measurable public relations objectives: An update.* Retrieved Aug. 20, 2023, from https://painepublishing.com/wp-content/uploads/2014/04/Setting_PR_Objectives-1.pdf.

KEYS TO PLANNING

- Clear goals and SMART objectives; evaluation ties back to these.
- Know your audience(s)/public(s) and tailor messaging accordingly.
- The best plans are understood and used — there's not one way to write a plan.
- Budgeting must be considered in all aspects of public relations planning; without proper budget planning, even the best plans will fail.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Encountering PR "In the Wild" (focus on planning).

- SMR.
- Build confidence in your KSAs: Developing objectives and strategies.
- Pick a plan type.

Step 3: Implement

This is where all the strategy, skill and creativity come together in action on behalf of the organization. Exciting? Yes. Difficult? Yes. Amazing? Yes.

The implementation part of the four-step process (RPIE) includes all the actions the organization is taking to bring the plan to life including the development and distribution of messages sent through each selected communication channel as planned. It also refers to keeping everyone on track with the work and monitoring the results of actions and messages while keeping track of campaign milestones.

Writing, editing, videography, photography, etc., should all be top-notch and 100% error-free. Work should conform to the norms of the medium — e.g., Associated Press Style, word/character count, time limitations, etc. Work should adhere to the brand's style guide.

Project management tools, like Gantt Charts keep the team on time and on task. There are free and paid tools on the internet like ClickUp!, Monday, Asana, SmartSheets, etc., that do this type of organizing; and Canva has Gantt Chart templates. Here's info from Zapier on how to make a Gantt Chart in Google Sheets.

A to Z of implementation

Adapted from the textbooks on *The Bookshelf* and other sources, including Thomas L. Harris's "Value-added Public Relations," here are just a few things practitioners can do to gain public attention/implement their plan:

A: Awards; Academies; Ambassador programs; Archives
B: Blogging; Books; B-Roll
C: Community engagement; Contests; Competitions; Created events; Corporate Social Responsibility; Corporate Social Advocacy
D: Data-driven reports/stories; Demonstrations
E: Email; Exhibits; Events
F: Free workshops/seminars/webinars, etc.; Festivals; Fan clubs; Feature stories
G: Groundbreakings, Grand openings; Guest speaking
H: Human interest stories
I: Interviews; Influencer partnerships; Influencer takeovers
J: Junkets (press); Joint ventures
K: Key issues; Key messages
L: Luncheons; LinkedIn engagement/webinars/articles; Loyalty programs
M: Media relations; Meetings; Museums
N: Newsletters; News releases
O: Official endorsements; Online reviews; Online newsrooms
P: PSAs; Podcasts; Product placements; Philanthropy
Q: Quality content; Questionnaires; Q&A sessions
R: Ribbon cuttings; Road shows; Radio trade-for-mention contests

S: Social media campaigns; Symbols; Storytelling; Sponsorships
T: Talk shows; Thought leadership articles; Tours
U: User-generated content; Underwriting
V: Volunteer opportunities; Viral marketing; Vehicles; Video news releases
W: Webinars
X: eXpert content; eXperiential activities
Y: Youth programs; YouTube channel
Z: Zone/Regional programs; Zero-cost activities; Zero-waste or Zero-carbon initiative publicity

Creativity

Creativity plays a pivotal role in public relations implementation. It enables practitioners to capture and maintain the attention of their target publics in a crowded and competitive media landscape. In a world filled with numerous communication channels and messages, standing out is essential. By observing industry trends and competitors' strategies, and adding innovative and attention-getting elements, PR practitioners can not only grab interest but also effectively convey strategic messages to help achieve both communication and organizational goals and help the brand or organization remain distinctive.

Creativity takes nurturing: go places, do things, attend, show up, experiment, stretch yourself. The textbooks on *The Bookshelf* offer many suggestions on being a successful, creative practitioner; some include:

Stay informed: Keep up with current events, industry trends, emerging technologies, etc. The more you know about what's happening in the world and your field, the more creative connections you can make.

Seek inspiration: Attend conferences, workshops, art exhibitions or other events to draw inspiration from different sources.

Study successful campaigns: Analyze successful PR campaigns from various industries to understand what made them effective. Learn from others' creativity and adapt successful strategies to your work.

Embrace diversity in your team: Different backgrounds and perspectives can lead to a richer pool of ideas.

Engage in cross-disciplinary learning: Explore areas outside of PR such as psychology, sociology, design or technology. Interdisciplinary knowledge can spark innovative ideas.

Engage in creative exercises: Challenge your thinking or get your creative juices flowing with activities such as games, word association, mind mapping, facilitated sessions or random stimulus exercises.

Brainstorm: Regularly hold brainstorming sessions with your team to generate a wide range of ideas. Encourage free thinking without judgment initially and then refine the ideas collaboratively.

Collaborate: Colleagues from other departments or even other organizations can provide additional perspectives and/or resources that can lead to innovative solutions.

Use creative tools and software like mind mapping, graphic design tools or creativity apps to aid in idea generation and execution.

Be curious: Whether it's thinking like a reporter or an event planner, asking questions can lead to creative solutions.

Engage in mindfulness practices, stress-reduction and productivity techniques like journaling, breathing, meditation, being present, exercise, self-care, support network, time management, prioritization, etc.

Writing

In EVERY survey of what employers want and in EVERY study of public relations and related job ads/job descriptions, WRITING is the number one skill required of PR practitioners. Just think about how much writing there is in the curriculum at your school! It's like that in practice, too. There may be writing-related questions on the Examination for the Certificate in Principles of Public Relations, not necessarily in a grammarian context, but conceivably related to strategy, technique, purpose, style or tools.

Media writing should follow Associated Press Style and articles are often structured in **inverted pyramid** format. The first paragraph is the lead and contains the most important information up front. The second paragraph is the next most important and provides an incentive to read on. The body paragraphs give pertinent information in descending order of importance and, for news releases, the story concludes with a boilerplate of basic information about the organization.

Remember, like all else in PR, good writing starts with RESEARCH. In their book, "Strategic Writing, Multimedia Writing for Public Relations, Advertising and More," Marsh, Guth & Poovey Short explain, the writing process is a series of steps: Research → Creativity/Brainstorming → Organizing/Outlining → Writing → Revision → Editing → Seeking approval → Distribution → Evaluation. Nothing should be distributed to the public if only one set of eyes has checked it — for accuracy, completeness, tone, strategy, diplomacy, brand voice, etc.

Editing should occur on two levels: macro and micro:

Macro editing, involves evaluating the overall content and structure of a written piece. In macro editing, the focus is on the big picture, assessing the clarity, coherence and logical flow of the document. Editors may reorganize sections, suggest changes to improve the narrative's structure and ensure the intended message effectively reaches the target audience. This stage helps refine the document's core ideas, arguments and organization before proceeding to fine-tune it in the micro-editing phase. Macro editing helps ensure you're saying what you need to say (purpose, key messages, context, complete information, etc.) in the way you need to say it (literacy level, audience-focus, etc.).

Micro editing (copy editing), is a meticulous review of a written work's grammar, punctuation, spelling and style. Editors concentrate on sentence structure, ensuring clarity, conciseness and proper construction. Editors correct typographical errors and format the text consistently. Attention is given to maintaining a consistent style, tone and adherence to editorial guidelines. Micro editing results in a polished, error-free document that meets high-quality standards for professional writing.

As students, you may have experienced the difference between macro and micro editing — like when something you turn in has no writing errors, but it doesn't receive an "A" because it's "off" in some way.

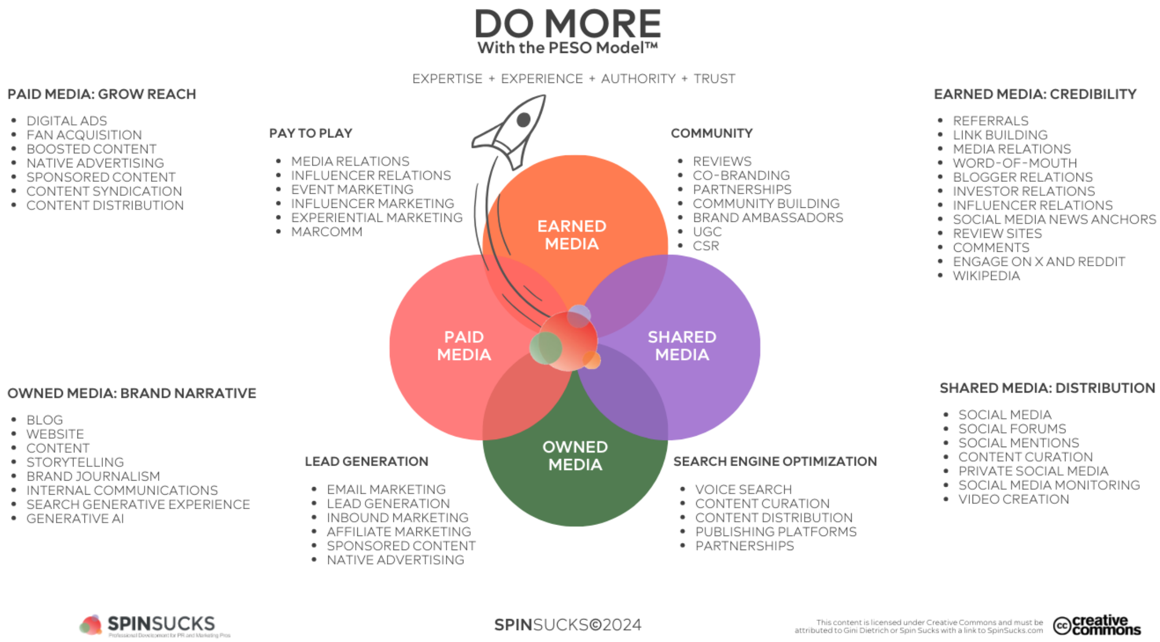
Readability is another consideration for effective communication, and in some cases, regulatory compliance. Practitioners can aid readability by using plain language, shorter sentences and paragraphs, including visual elements, and limiting word complexity. The Flesch-Kincaid Grade Level is one way to calculate readability, and it's available on common software like Microsoft Word. Though in some instances, higher reading levels are appropriate, and in others, lower reading levels are required. For example, more than 20% of states require Medicaid information be written at the sixth-grade level or below. It's generally recommended that practitioners aim for approximately sixth- to eighth-grade reading levels. For extremely low literacy populations, video or minimal text written at the fourth-grade level or below with information presented mostly visually is common. Practitioners also should be mindful of diversity/culture and provide material in alternate languages when appropriate.

PESO Model™

Can you imagine a time when there was only newspaper, radio and three TV networks? Or before that — radio and newspaper? Or before that?!? The proliferation of channels means that people can pick and choose their content, and practitioners need to carefully choose where they'll be — after all, with limited time and resources, we can't be everywhere.

Gini Dietrich, founder of the blog "Spin Sucks," corralled available implementation options into the PESO Model™, which has essentially taken IMC principles + known channels and aligned them into controllable (owned and paid) and uncontrollable (earned and shared) dimensions.

The PESO Model™ is covered here under implementation (what you'll do) to underscore the many, many options communicators have for reaching their intended audiences. The PESO Model™ was updated in 2024 and has various versions that focus on strategy or tactics. Using the PESO Model™ helps organizations increase perceptions of E-E-A-T (expertise, experience, authority, trust) that directly influence reputation.



How implementation occurs or what you'll choose to use and when relates directly to organizational aims, capacity and budget.

The PESO Model™ is not in an order of operations, like a math problem., If it were, **owned media** (your website, your publications, etc.) would be first/most important because they're most controllable and because so much digital communication/commerce starts and ends with the organization's website. The priority order of the following is determined by goals, budget and other factors. **Shared media** (social media) is commonly used because of its reach and cost (free/low), but always remember, people and organizations don't own/control the social channels. You're putting the content you create on someone else's tool to reach the people you want to reach because that's where they are. **Earned media** (traditional media relations and more) is when we can convince someone else (journalist, blogger, influencer, etc.) that our message is good enough for them to pass along to their readers/viewers, without paying for placement. When someone else carries your message, it lends *third-party credibility*. Earned media has a cost (time and effort); it's not free. **Paid media** refers to anything you pay for to ensure that your message is delivered as you intend in a certain space and/or time. That could include traditional advertising, sponsorships, product placement, etc.

Practitioners must understand the differences between **paid** (advertising — controlled), **earned** (publicity — uncontrolled), **shared** (social media — uncontrolled) and **owned** (internal — controlled) media and how all of these can work together to build and maintain organizational/brand reputation.

Media Relations

Media relations is not the extent of public relations, but it is the key to EARNING media coverage. Public relations practitioners interact with journalists, bloggers, podcasters and other media professionals, both **proactively** (pitches, releases, alerts, tours, etc.) and **reactively** (responding to inquiries, requests for comment or interviews, etc.) to get their stories or ideas in media channels that reach certain audiences.

News organizations have no obligation to use any information a practitioner pitches or sends. Therefore, public relations practitioners must resist pressuring reporters for coverage and understand that submitting a news release or calling in a pitch does not guarantee its publication. Understanding and respecting the First Amendment rights of news organizations will go a long way toward building professional, ethical standards in media relations.

PR practitioners work to establish good relationships with reporters, editors and others, which should, in turn, help foster accurate, balanced and timely coverage of your organization. Important relationships for effective media relations:

- Newspeople (Help them do their job well.).
- Production staff members (Get them on your side.).
- Other public relations practitioners (shared responsibilities).
- Contractors like freelance writers, photographers, videographers, etc. (assist with implementation).

PR practitioners need to have a ***nose for news*** and offer newsworthy story ideas or information. What's newsworthy? The seven generally accepted news values are *impact, timeliness, prominence, proximity, bizarre/unusual, conflict, currency* and *human interest.* It's NEWS, not OLDS, so it should be fresh, benefit-oriented (Why do people need this information?; How does your info answer *WIIFM?* — What's in it for me?), and innovative when possible.

Key elements of media relations are search/research, targeting, newsworthiness, quality content, responsiveness, monitoring and results reporting. Specialized fee-based tools like Cision, MuckRack, Meltwater, Agility, etc., help practitioners manage these important tasks. Metrics like SimilarWeb's UVM (sum of unique visitors/month visiting a news organization's domain), Average Visit Duration, sentiment and other analytics help streamline results reporting.

Media relations is highly measurable. There can literally be a straight line from the practitioners' action (call, email, news release, publicity event, social media post, etc.) to an outcome (published news article). The effectiveness of a media relations campaign should be evaluated regularly. Though the amount of media coverage is only an output measure, it remains among the top key performance indicators clients value.

Even in the age of social media, the **news release** is still a media relations mainstay. Public relations practitioners write the release and direct its approval process. This process varies by the organization but may include input from the corporate legal counsel and the CEO. News releases often include *positioning quotes*, through which organizational leadership can infuse the news story/release with opinion-type commentary, perspective, thank yous, etc. Public relations practitioners should focus on the objectives of each communication piece and how it relates to the overall corporate strategy.

Distribution is most often electronic through email, online wire services, websites, or social media. In "The Practice of Public Relations," Seitel 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 (2020, p. 189). AP often picks up local journalists' news stories, which magnifies their reach exponentially. Fee-based wire services such as PR Newswire, Business Wire and Market Wire News are also useful tools for distribution.

Practitioners occasionally send promotional media kits/press kits (packages) to get media attention — some versions are digital, others are mailed or delivered. These can be highly creative and sometimes get used on-air or featured in publications, but it's important to meet any legal, regulatory or common policy requirements. Online newsrooms or press kits are also popular and useful. How releases are delivered may change with technology, but the overarching purpose of the release does not — to effectively communicate information about X to the media as an intermediary for the public. Gaining coverage builds credibility and trust, engages audiences and assists in reputation management.

Video News Releases (VNRs) are completely packaged electronic news stories, distributed to broadcast media outlets. VNRs should look like news stories, not like advertising. VNR content must be completely accurate because it might air as submitted to the program producer. VNRs should declare the sponsoring organization or individual. According to "Effective Public Relations" and other texts on *The Bookshelf*, observing a code of good practice for VNRs will help establish your reputation as a trustworthy, reliable news source. **B-roll** is extra video footage with sound that the media outlet can use to build its own story using your materials. Similarly, for radio or podcasts, **actuality** clips are sound clips that can be used to paint a more vivid picture.

Some best practices for media relations:

- Align media relations efforts with organizational and public relations goals.
- Always focus on the media channels that can meet your communication objectives.
- Be informative and honest in every contact with journalists, bloggers, podcasters and other media.
- Be mindful of timelines and deadlines and how they vary by media type (TV has short, same day-of, deadlines; magazines have deadlines months prior to publication).
- Research to find journalists, become familiar with specific news they cover, and offer only quality content.
- Determine who should receive the information, and send quality, newsworthy stories and ideas.
- Keep a background sheet handy, be able to easily access "fact" files and info, and people in your organization who have the information needed.
- Learn as much as you can about the reporters and news organizations that cover the different aspects of your organization.
- Maintain an online newsroom (news release archive, backgrounder(s), downloadable images).
- Monitor media; know how much, types and tone of the coverage received.
- Provide value to reporters; offer newsworthy, timely stories of direct interest to their readers, listeners or viewers.
- Work closely with other parts of your organization to prepare for media contacts and ensure that you have the most accurate and up-to-date information.
- Be prepared for interviews or other media inquiries:
    - Know the facts.
    - Before engaging with media, know key points or messages and be able to verbalize these clearly.
    - Prepare for questions. Develop Q&A.
    - Plan for articulation of key messages.
    - Provide media training.
    - Select and train the right spokespeople.
    - Stick to the facts; never guess; never speculate; never lie.

- Avoid “no comment,” even if you can’t comment.
- Be confident, credible and personable.
- Be on time.
- Occasionally pause when speaking — editing points are necessary for video and pause points are needed for photography.

Some Media Relations considerations

Here are some questions to guide your understanding of sound media relations:

- Do you understand the relationships between public relations practitioners and journalists?
- Can you relate current events and trends to what your organization/clients are doing? In other words, have you developed news sensibilities and solid news judgment?
- Do you recognize the strengths and weaknesses of different media channels and select the ones that will be most effective for different communications goals?
- Do you understand how to use the internet, social media and other new media technologies as part of an overall media strategy?
- Do you understand how the many information distribution systems work?
- Have you learned to recognize unique media relations laws, requirements, and responsibilities associated with financial public relations for publicly owned companies?

Tip: Think about how you might work with reporters. Refer to texts on *The Bookshelf* and take advantage of other resources for developing your knowledge, skills and abilities in this area.

Using Information Technology Efficiently

Technology expands communication channels but doesn’t change public relations principles.

Public relations practitioners must be lifelong learners — about both people and technology. Though recent college graduates may know more than their clients or bosses about how the latest media technologies work, that knowledge may not be enough for success on the job. New practitioners must understand how to use those tools strategically as part of an overall public relations plan. Remember, you’re not communicating as yourself through these platforms, you’re communicating as or on behalf of the organization.

Public relations practitioners tell stories through multiple channels directly to key publics. This can potentially personalize the connection between people and organizations and build grassroots support for products, services or causes. Public relations practitioners work to foster mutually beneficial two-way relationships between organizations and those publics upon whom the organization’s success depends. As new technologies are added, older ones aren’t going away. Television, newspapers and other traditional media outlets, or distribution systems like mail, play major roles in delivering information to many publics.

Public relations practitioners must stay current with trends and adapt as things change in the digital age. Know which channels can most effectively reach each key public.

Information Technology Considerations

People today expect content to be individualized, tailored to their needs and delivered regularly and instantaneously. This requires public relations practitioners to deliver online communication that is not only informative but also concise and useful — not sales pitches, fluff or trivia. Practitioners need to understand the relevant publics granularly and be well-versed in emerging and ever-changing digital media trends. That understanding requires ongoing research and monitoring of online behaviors.

Without old-school gatekeeping (common in the days of few media outlets, editors, etc.), organizations can reach the publics directly and interact with people without media intervention. If the local news doesn't cover a story, organizations simply get the word out through digital means. There's good and bad to that. Without traditional gatekeepers, there's much room for malinformation, misinformation and disinformation. When people search online for information they can use, they frequently don't pay attention to the source, which can make a post from a conspiracy theorist just as credible in some instances as a report from a respected news organization.

The "news cycle," which used to have specific deadlines in the morning, afternoon and evening, runs 24/7 for most news outlets and other direct media (curating websites, social media, blogs, etc.). With digital, the "news hole" (a limited number of newspaper pages or broadcast minutes to fill each news cycle) is essentially eliminated. The demand for information in the 24-hour news cycle is massive, and the capacity for delivering stories is almost limitless. Public relations practitioners have always needed to be available to various publics, but with media outlets issuing constant updates, the requirement of being "on call" is just about around the clock.

Anyone with a smartphone can potentially share information with a massive global audience. This has significantly changed society. People with mobile devices can capture and immediately post both positive and negative audio, video or still images online. Public relations practitioners must constantly be ready to respond to negative messaging and to engage online. Reputational dangers abound when unguarded remarks made in public or private become internet fodder — many politicians, sports figures and celebrities have been embarrassed in recent years when a "non-media" attendee at a party posts a video of an off-color or controversial comment online.

Convergence means that media no longer have lanes — broadcast outlets publish print stories, print media publish multimedia stories, audio outlets stream video of their shows, etc. The bottom line is that practitioners must provide content in various modes through a variety of channels to both media outlets and key publics.

Regardless of channel, the fundamental skills of writing, critical thinking and strategic analysis are necessary in daily practice. The content of each message still affects the credibility of the practitioner and the organization.

Analytics from websites, media monitoring, social media management tools, etc., help practitioners measure and evaluate message reach. But likes and shares don't necessarily meet business goals. What, for example, do engagement numbers say about message awareness, audience engagement, lead generation, share of voice, reputation or return on investment?

Online digital communication can challenge public relations practitioners in many ways. Once organizations post information online, they can't control their messages. Publics expect organizations in online communities to be transparent, ethical and authentic. Organizational credibility is constantly being scrutinized.

Online followers can be located anywhere; therefore, geographic proximity gives way to cultural proximity. Practitioners must be alert to ways people in different nations or cultures might misperceive messages or organizational actions and ensure that what's communicated digitally universally complies with the rules and regulations of other regions or nations when applicable.

Reputation management is aided by media monitoring and social listening (the practice of monitoring and analyzing online conversations and discussions on social media platforms and other digital channels to gain insights into public sentiment and mentions) in blogs, websites or social networks. With a few keyboard strokes or taps on a mobile device, negative online posts can instantly threaten reputation, credibility and market position. Perception is reality to many publics, and a potentially damaging rumor can reach millions of people in seconds. Prompt and appropriate responses are essential. The guidelines for crisis communication apply to cyber crises with the added priority of urgency. Practitioners need to be proactive in addressing issues that lead to such incidents as well as in managing the aftermath. Failure to do so can result in lasting damage to an entity's image and public opinion.

IMPLEMENTATION: Additional Resources (beyond *The Bookshelf*)

Deitrich, G. (2024). The newly refreshed PESO Model™ graphic and process. Retrieved March 22, 2024, from https://spinsucks.com/communication/refreshed-peso-model/.

Dietrich, G. (2023). The ultimate guide to the PESO Model™. Retrieved Dec. 28, 2023 from https://spinsucks.com/ultimate-peso-model-guide/.

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Newsom, D., & Haynes, J. (2017). *Public relations writing: Strategies & structures, 11th edition*. Cengage Learning.

Zapier (2024). Creating a Gantt chart in Google Sheets. Retrieved May, 20, 2024 from www. zapier.com/blog/gantt-charts-for-better-project-planning/)

KEYS TO IMPLEMENTATION

- Timely, accurate and error-free execution of the plan.
- Coordination and collaboration.
- Adaptability and contingency planning.
- Quality media-appropriate materials and activities.
- Remain on-strategy to convey the organization's key messages, enhance its credibility and engage its target audience, ultimately shaping its reputation and relationships with the public.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Encountering PR "In the Wild" (focus on implementation).
- Media relations: journalist research and pitch practice.
- Media relations: online press kits.
- PESO Model™ Scavenger Hunt.
- Train your brain.

Step 4: Evaluate

Evaluation in public relations refers to the systematic assessment of PR efforts to:

- Measure the effectiveness of the program against objectives.
- Identify ways to improve/develop recommendations for the future.
- Adjust the plan, materials, messages and activities before going forward.
- Demonstrate return on investment (ROI) as well as the impact and value of PR efforts.
- Inform strategic decisions.
- Collect data and record information for use in the research phase of the next program.

There is a lot of activity in public relations, generally, and the evaluation step helps practitioners report to and share insights within the organization. In RPIE, evaluation cycles back to objectives — *Did you meet objectives? Did you do what you said?* Evaluation can also be against industry standards or other benchmarks.

Evaluation methods can be either qualitative or quantitative or both. Evaluation can occur before, during (formative research) or at the conclusion (summative research) of PR campaigns.

For more than 25 years, there's been a concerted effort to elevate evaluation in public relations by multiple thought leaders and organizations including the Commission on Public Relations

Measurement and Evaluation. In 2010, the **Barcelona Declaration of Measurement Principles** was adopted at an international summit of multiple organizations and then revised in 2015 (version 2.0) and 2020 (version 3.0). The **Barcelona Principles 3.0** affirms these seven key principles of communication/PR measurement and evaluation:

1. Setting measurable goals is an absolute prerequisite to communication planning, measurement and evaluation.
2. Measurement and evaluation should identify outputs, outcomes and potential impact.
3. Outcomes and impact should be identified for stakeholders, society and the organization.
4. Communication measurement and evaluation should include both qualitative and quantitative analysis.
5. AVEs (ad value equivalency) are not the value of communication.
6. Holistic communication measurement and evaluation includes all relevant online and offline channels.
7. Communication measurement and evaluation are rooted in integrity and transparency to drive learning and insights.

There are multiple levels of metrics: **inputs** (what you need/preparation for communication), **activities** (things you do), **outputs** (what you create/distribute), **outtakes** (what audiences do with/take from your communications), **outcomes** (effects of your communications) and **impacts** (results of your communication efforts). The lowest levels of measurement are inputs, activities and outputs, and the highest are outcomes and impacts. Dr. Jim Macnamara corralled these and related metrics into the "Taxonomy of Evaluation," through which he aligns metric types to categories of measurement (inputs to impacts). For example, you can measure outcomes like learning/knowledge, attitude, trust, intention, advocacy, etc., using surveys and/or more easily collectible metrics like registrations, trials, etc.

Multiple organizations (including the Institute for PR and PRSA) came together to develop and affirm the Barcelona Declaration of Measurement Principles. There's even an interactive online tool to practice incorporating measurement and evaluation into your work. Check out the Association for the Measurement and Evaluation of Communication's interactive Integrated Evaluation Framework at https://amecorg.com/amecframework/framework/interactive-framework/.

Thought leaders abound in measurement, but there's only one "Measurement Queen." Katie Paine's Six-step system for perfect measurement is comprised of:

1. Defining the goal.
2. Prioritizing goals and audiences.
3. Defining benchmarks.
4. Defining your Key Performance Indicators.
5. Selecting measurement tools.
6. Analyzing results/drawing conclusions/presenting reports.

Cornerstones for effective evaluation are measurable objectives, defined key performance indicators, consistent data collection/monitoring and reporting + USING these insights to improve your public relations efforts going forward.

KPIs can be particular to the organization or the industry. Take for example the field of "advancement" (college/university alumni relations, donor relations, fundraising, etc.). The first

Handbook of Institutional Advancement says that five things universities need from alumni are 1) advice, 2) service, 3) money, 4) new students, and 5) ambassadorial representation. How do you measure that? Big crowds of alumni showing up at sporting events in school colors? Sadly, that isn't enough of a metric to help practitioners use data and information to improve activity and offerings. key performance indicators (KPIs) for alumni associations can help measure effectiveness in serving alumni, promoting the organization's goals, sustaining relationships and advancing the institution over time. Here are just a few of the metrics that alumni associations can regularly report/try to improve upon as KPIs:

- *Alumni Engagement*: Track the percentage of alumni who actively participate in association activities such as event attendance, volunteer participation or donations (annual giving, major gifts and planned giving).
- *Membership Growth:* Track the number of alumni who join the association as members over a specific period and the number not renewing. If an association isn't attracting new members and retaining current members, it's declining, not growing.
- *Alumni Database Growth and Accuracy:* Track the number of good mailing addresses, accurate email addresses, phone numbers, etc. The organization needs good information for effective communication and engagement.
- *Diversity and Inclusion*: Assess the diversity and inclusivity of efforts and events to ensure representation from various demographic groups, affinity groups, geographic locations, etc.
- *Communication Effectiveness*: Assess the open rates, click-through rates and engagement metrics of alumni association newsletters, emails, social media posts, etc., to gauge the effectiveness of communication efforts.
- *Career Support:* Evaluate alumni engagement with career services including job postings, resume reviews, mentoring program participation, networking opportunities, guest speaking in classes, etc.
- *Retention Rate*: Calculate the percentage of alumni who continue their involvement with the association year after year; this can indicate the strength of alumni relationships.

More generally, public relations key performance indicators can include output metrics (activity, volume), media impressions/mentions/reach/etc., social media engagement, website traffic, conversions, email opens and click-through rates, sentiment analysis, return on investment, crisis response metrics, event attendance, activity participation, etc.

KPIs can help organizations track progress, identify areas for improvement and demonstrate the value of the public relations function. The specific KPIs selected should align with the organization's goals and mission.

It's not always possible, but anytime practitioners can demonstrate a DIRECT RESULT from their efforts, it elevates perceptions of value and contributes to organizational success. One way to think of evaluation is that it helps practitioners connect the dots between the things they do and organizational results. For example, plan an event (your action), send an invitation (your action), RSVPs come through the URL on the invitation (their resulting action/trackable back to your action), check-in guests who've BOUGHT TICKETS (measurable action), SHOWED UP (measurable action), and GAVE A DONATION OR BOUGHT SOMETHING IN THE SILENT OR LIVE AUCTION (measurable action) to MEET THE PARTICIPATION AND FUNDRAISING TARGETS for the event (direct results).

Keep in mind that anything can be measured — you can even break complex constructs like "happy" into measurable variables like behavioral variables (e.g., smiling), self-reports (e.g., expressing positive emotions or satisfaction with life), etc. It's important that what's being measured truly indicates what you're trying to accomplish and can impact organizational results. *Vanity metrics* is a term that refers to numbers that look good or sound impressive but don't really provide insights into PR effectiveness, impact organizational/communication goals, or provide a basis for future action. For example, 5,000 people saying online that they're "going to" or "interested in" something is great, but how many people show up in person? Which of those numbers matters more?

Spend time on meaningful evaluation that provides actionable information that can help shape decision-making. Also, be sure there are logical connections, useful/meaningful/relevant data collection, and that logical fallacies aren't present. Flawed causality (fallacy of causation) is a logical error whereby relationships are assumed among unconnected factors. For example, just because ice cream sales are higher in summer and shark attacks are higher in summer doesn't mean that ice cream and shark attacks are related in any way. Other logical fallacies include hasty generalizations (drawing broad conclusions based on limited evidence) or confirmation bias (seeking out data that confirms your suspicions); there are many more logical fallacies common enough to have names and definitions.

Measurement and evaluation systems should keep up with the pace of change and adaptation of new tools. That's not always easy as channels proliferate. The Institute for PR regularly publishes measurement- and evaluation-related research, for example https://instituteforpr.org/measurement-roundtable-adapting-metrics-in-a-changing-media-landscape/.

EVALUATION: Additional Resources (beyond *The Bookshelf*)

Association for the Measurement and Evaluation of Communication (2020). *Presentation: Barcelona Measurement Principles 3.0.* Retrieved Sept. 12, 2023, from https://amecorg.com/wp-content/uploads/2020/07/BP-Presentation-3.0-AMEC-webinar-10.07.20.pdf.

Association for the Measurement and Evaluation of Communication (2023). *Barcelona Measurement Principles 3.0.* Retrieved July 15, 2023, from https://amecorg.com/barcelona-principles-3-0-translations/.

Institute for PR (2021). *Communicators guide to research, analysis and evaluation.* Retrieved Sept. 4, 2023, from https://instituteforpr.org/wp-content/uploads/IPR-Guide-to-Measurement-v13-1.pdf.

Institute for PR (2021, April 29). *IPR Webinar: Best practices in research, analysis, insights.* Retrieved Sept. 4, 2023, from www.youtube.com/watch?v=QDfFDSUy9hA.

Macnamara, J. (n.d.). Taxonomy of evaluation towards standards. Retrieved Sept. 16, 2023, from https://amecorg.com/amecframework/home/supporting-material/taxonomy/#taxonomy-table.

Paine, K.D. (n.d.). *Paine Publishing: Measurement Resources.* Retrieved Sept. 1, 2023, from https://painepublishing.com/measurement-resources/.

Paine, K.D. (2023). Katie Paine's six-step system for perfect measurement. Retrieved Sept. 16, 2023, from https://painepublishing.com/measurement-resources/katie-paines-6-step-system-for-perfect-measurement/

KEYS TO EVALUATION

- Clear objectives and key performance indicators (KPIs) are vital for successful evaluation.
- Continuous monitoring of relevant metrics and adapting as needed.
- Meaningful analysis and reporting — don't just collect data, use it.
- Beware of empty metrics, biases, logical fallacies and assumptions of causation. Prioritize objectivity.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Encountering PR "In the Wild" (focus on evaluation).
- What does success look like?
- Review award winners like OK 988 or textbook case studies.
- Can you measure it?
- Integrated Evaluation Framework.

Plan Formats and Styles

Public relations plans come in many formats: paragraphs, tables and graphics. These are presented as suggestions only. There's no one way to write a plan, just be sure that all four parts of RPIE are addressed.

Plan on a Page

Courtesy PRSA Marketing Committee 2023 (created by Elyse Hammett, APR, Fellow PRSA).

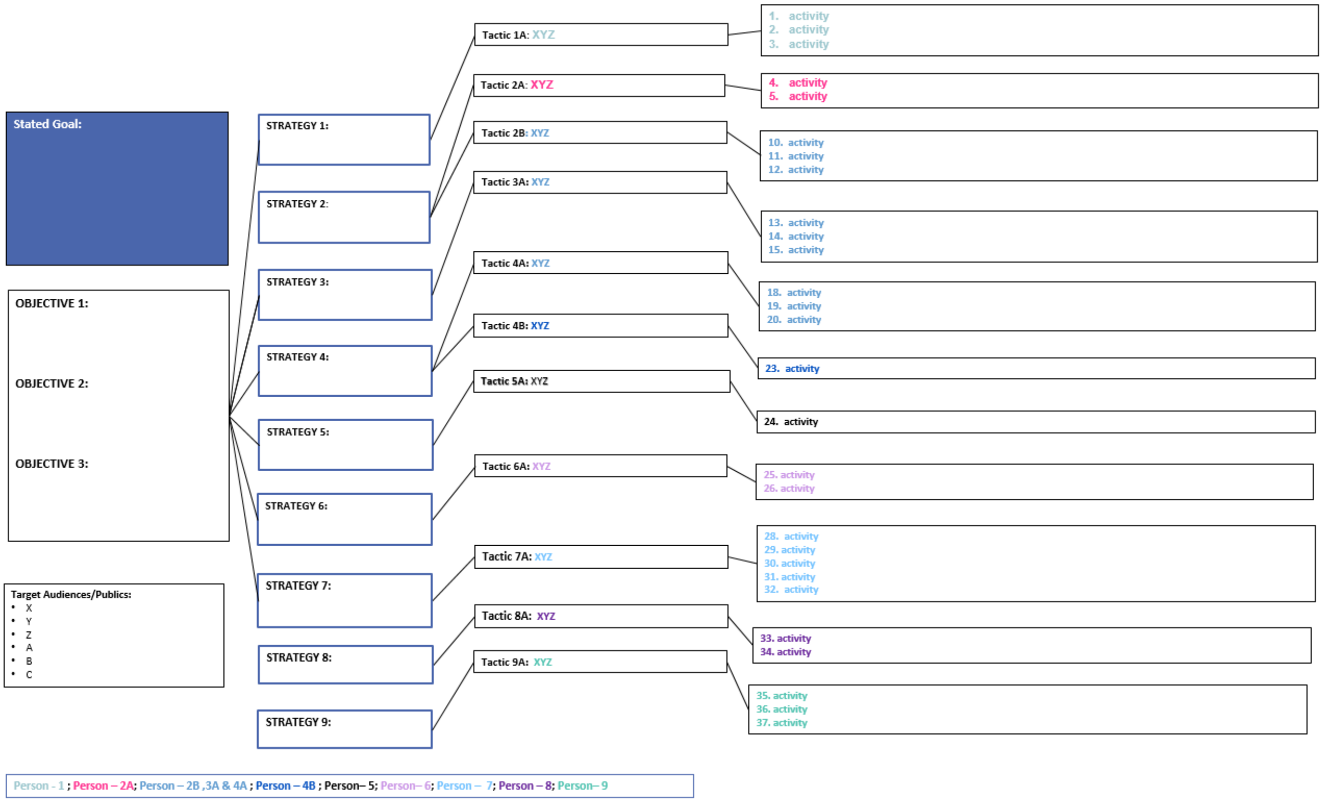

Table Style Plans

Example Courtesy of Minnesota PRSA, APR Study Session Handout

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

Problem
Situation/Analysis
Goals

Repeat below for each public.

Public:

Objectives:

1. State specific objective for this audience.

Communication strategy	Messages	Tactics/tools	Budget	Staff/ responsibility	Timetable	Evaluation
1.						

2.						
3.						

Paragraph Style Plan

1. Problem – (one to three 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 public:

4. Public.
5. Objectives (both long term and short term).
6. Communication strategy.
7. Messages.
8. Tactics/Tools.
9. Budget (A budget summary is common at the end of a plan.).
10. Staffing/Responsibility.
11. Timeline.
12. Evaluation.
13. Summary documents:
    - Budget
    - Materials list
    - Task list and timetable

Courtesy of Minnesota PRSA, APR Study Session Handout.

Example Plan

Award winner

Rolling out the new 988 mental health line occurred in each state. Jones PR took Oklahoma's roll out to the next level through their stellar PR work. Here's the ICON 2023 presentation on their Silver Anvil-winning campaign by Jones PR Vice President Taylor Ketchum, APR: https://app.box.com/s/ayzmeu0payqijb9n3emh829ggxaznbj5. You can also learn more about 988 Oklahoma at https://988oklahoma.com/.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Pick a plan type.
- Case study depth analysis.

Ethics and Law (20%)

Examination KSAs

Ethics and Law questions account for 20% of the Certificate Examination questions. Specific KSAs for these topics are:

- **Ethical behavior:** Conducts professional activities in a principled manner and adheres to commonly accepted standards for professional behavior.
- **Legal issues:** Upholds applicable international, national, state and local laws regarding defamation of character (e.g., libel and slander), corporate governance, disclosure, copyright, trademarks, fair use doctrine, First Amendment issues, privacy laws, etc.

Ethics Defined

Ethics refers to a set of moral principles; it connotes the process you follow to decide what is right or wrong. The application of ethics to public relations practice is critical to our profession. Unfortunately, most ethical questions do not have black-or-white answers. Various values, such as our commitment to truth, honesty and transparency vs. our commitment to safeguard client confidences, often compete. The correct moral path may not be clear.

This section presents common ethical principles of public relations and a decision-making model. It is designed to help you evaluate ethical dilemmas and determine rationales to address them. In the exercises section, several scenarios are provided for you to practice ethical decision-making.

General Ethics Principles

- **Act in the public interest.**
  - Find the greatest good for the majority of the people (a utilitarianism or teleological perspective in which what benefits the most people in the end is moral).
- **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 publics.
- **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.

Specific Ethics Principles

- **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 publics, from employees to external publics.
  - Maintain ethical relationships with government, regulatory agencies, news media, colleagues and all other publics.
- **Safeguard confidences.**
  - Build trust through the protection of confidential information.

    - Secure the privacy of organizations and individuals.
- **Do not damage the reputation of others.**
    - Be careful during agency pitches.
    - Don't impugn the reputation of other practitioners.
    - Stick to the facts and avoid the gossip.
- **Avoid conflicts of interest.**
    - Disclose the 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 and funding sources.

Ethical decision-making process

Here are suggested steps in an ethical decision-making process:

1. Define the specific ethical issue or conflict.
2. Identify internal and external factors (legal – political – social – economic) that may influence the decision.
3. Identify the key values.
4. Identify individuals and the publics who will be affected by the decision and define your obligation to each.
5. Select ethical principles to guide your decision-making process.
6. Make your decision and justify it.

Ethical decision-making steps in action

From the Public Relations Society of America Board of Ethics and Professional Standards:

<u>Situation</u>: 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 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 that further testing is planned simply to determine the size of the reservoir. What do you do?

<u>One Way To Arrive at Your Decision</u>

1. **Define the specific ethical issue or conflict.**
    - Can you ethically disseminate deceptive information about the financial condition of your company on which a number of key publics may rely?
2. **Identify internal and external factors (legal – political – social – economic) that may influence the decision.**

- What does the federal Securities and Exchange Commission (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?

3. **Identify the key values.**
   - ***Loyalty*** – As a professional, commitment to your employer often comes before other obligations.
   - ***Advocacy*** – As a responsible advocate, you should 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 employers on a course of action that is in the company's best interest both today and into the future.
4. **Identify the audiences who will be affected by the decision and your obligation to each.**
   - Consider the company/employer, board of directors, shareholders/potential shareholders, SEC, other government agencies, financial analysts, financial media, employees, other publics, the public relations profession and society in general.
5. **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 the underpinnings of our profession.
6. **Make your decision and justify it.**
   - The public relations practitioner'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 the 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 or conflict with laws governing financial disclosure.
   - Ultimately, this course of action is in the company's best interest. The release of deceptive information could contribute to declining public trust and potential legal liabilities related to proper disclosure under SEC regulations.
   - Your recommended action preserves the integrity of the communications process 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? If so, what would you do then?

Key legal principles for PR professionals

PR practitioners aren't lawyers, but they absolutely need to understand and act upon key legal principles impacting day-to-day work. Choices made when communicating on behalf of organizations can have far-reaching implications for the practitioner, organization, individuals and society. (See also business laws and regulations.)

The Certificate in Principles of Public Relations Examination requires you to demonstrate a broad understanding of several important legal concepts: defamation, intellectual property, privacy and First Amendment issues. The following information briefly summarizes those concepts. For a more extensive review of laws affecting public relations practice, see the Associated Press Stylebook's Briefing on Media Law section.

First Amendment

The First Amendment helps shape the environment in which public relations practitioners operate by safeguarding rights. It states:

> *Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof, or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances.*

Within the bounds of laws and regulations, PR practitioners have a right to communicate on behalf of their clients or organizations, including disseminating information and advocating for their clients' interests. First Amendment protections mean that PR practitioners can share information with journalists and others who may choose to use it in their own communications. Public relations campaigns sometimes involve organizing events, rallies or gatherings to engage with the community or advocate for a cause, and the First Amendment's recognition of the right to peaceably assemble supports such efforts. Public relations professionals may engage in advocacy on behalf of clients by petitioning the government for policy changes, permits or other actions.

PR practitioners need to pay attention to laws and court cases impacting journalism and the First Amendment because these legal developments can directly affect their ability to communicate messages and navigate the boundaries of free speech and media relations. First Amendment protections are not absolute. For example, there are time/place/manner, obscenity and other restrictions. *Political speech* (expresses opinions, ideas, information related to politics, government, candidates, public policies, etc.) is highly protected. *Commercial speech* (promoting or advertising products, services, etc.) is highly regulated and one of the least protected forms of speech under the First Amendment. Generally, uncontrollable earned media efforts align more with rules and laws related to journalism, and controllable paid media efforts that promote products and services align more with the rules and laws related to "commercial speech," but the legal landscape changes.

Intellectual property

The broad term *intellectual property* refers to creations of the mind/products of human thought. It's a legal term that describes rights or entitlements that apply to the ownership and use of certain types of information, ideas or other creative concepts in an expressed (fixed) form. There are sets of rules and regulations in the U.S. and other nations worldwide that allow people and organizations the right to control and protect their inventions, ideas and creations from being used by others without permission. Intellectual property is a specialty field of law because it's a special kind of ownership.

Professional communicators must honor others' intellectual property. As a quick example, notice that every reference to the PESO Model™ in this "Study Guide for the Certificate in Principles of Public Relations" has the trademark symbol. *Why?* It was created by and belongs to Gini Dietrich. It is registered and protected. The UAB is allowed to use it and her copyrighted graphic in this study guide with her permission.

TRADEMARK

People and organizations can file for protection through the U.S. Patent and Trademark Office and in similar entities in other countries. Patents are for inventions. Trademarking is a complex legal process that allows organizations to differentiate and profit from their name, products, services and similar. These protected elements are then "marked" for protection via symbols: trademark (™), registered trademark (®), or service mark (℠). Trademark-related intellectual property protections cover name, logo, image, sound and more. For example, the way (environment) in which Chuck-E-Cheese serves pizza is protected as a service mark (℠) because it's different from other pizza restaurants. Even things like distinguishing fonts can be protected from others' use without permission as "marks" of their "trade," for example, the Disney font.

It's important to note that not only big corporations protect their intellectual property through this process. Any person or organization that goes through trademarking does so to control and protect their work. It's also important to note that trademarked material can sometimes be used by others for purposes like commentary, criticism or satire without infringing on the creator's rights. At times, whether these things are *transformative* or *infringing* may have to be settled in a court of law — for example, *South Butt* logo and tagline *"never stop relaxing"* on the *type of merchandise* offered (fleece jackets, shirts, etc.) was determined in court (2010) not to be a parody, but a trademark infringement of the *North Face logo +* tagline *"never stop exploring" + type of merchandise* and soon after disappeared.

COPYRIGHT

Copyright: Copyright law in the United States is largely governed by federal law, although state copyright laws do exist. Federal U.S. copyright law requires copyrighted works to be 1) original and 2) fixed in a tangible medium. An example of "fixed in a tangible medium" is that a recording of a dance routine or its written choreography can be copyrighted, but the performance itself can't be. For works made after Jan. 1, 1978, copyright is instantaneous and does not require any formal registration. Formal registration with the U.S. Copyright Office does help establish copyright ownership in an infringement suit. Duration of copyrighted works created after Jan. 1, 1978, is life of the author plus 70 years for individual works, and 95 years from publication or 120 years from creation for works for hire (whichever is shorter). Works created prior to 1978 may or may not have copyright protection depending upon various factors that include formal registration and renewal. Works created prior to 1928 generally do not have copyright protection as of 2023. Outside of the United States, copyright laws may vary, but many nations are members of the Berne Convention, which established baseline requirements for copyright protection. The U.S. has been a member of the Berne Convention since 1989. As of 2023, the U.S. Copyright Office has deemed works created purely from artificial intelligence do not meet mandatory threshold requirements for originality and therefore do not receive copyright protection.

Who owns the copyright?
The organization owns an employee's work done on behalf of the organization. When something is created as a *work for hire*, for example, photography or art, the contract between the organization and the non-employee who takes photos or creates artwork determines who owns the copyright. The copyright owner determines the use and the cost of use of the creative work. The contract must specify ownership details. For example, if you're commissioning photography or artwork, the contract needs to say whether your organization (purchaser) own both the physical piece and digital rights, who gets photo credit, etc.

Plagiarism: The use of another's work without proper attribution. At the core of plagiarism is the dishonest attempt to present another's work as your own. Plagiarism is frequently remedied by using proper citations or attribution. Plagiarism is not necessarily copyright infringement, although it can be. For example, plagiarism of a work in public domain (i.e., copyright protection has expired) can never be copyright infringement. However, plagiarism for a work still protected by copyright could be infringement depending upon the nature of the content used.

Fair Use: Fair Use is an affirmative defense to copyright infringement. It allows individuals to use copyrighted materials without paying royalties in limited circumstances. In analyzing the fair use affirmative defense, U.S. courts look to four factors, none of which are dispositive. They are: 1) purpose and character of the use, e.g., commercial or nonprofit, 2) nature of the copyrighted work, e.g., whether the work is highly original, 3) amount or substantiality of the portion used, e.g., the smaller the amount the more likely fair use exists, and 4) the effect on the use on the market, e.g., the greater the impact on the market the less likely it is fair use. In a fair use defense, the alleged infringer has a greater success rate for fair use if the use is highly transformative. Fair use is decided on a case-by-case basis. Outside of the U.S. the concept of fair use does exist, but not in exactly the same form.

Defamation

Defamation is untruth that damages a reputation and it is not protected speech under the First Amendment. 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 be defamed or damaged, an exposed person or organization must prove three conditions were present: hatred, contempt and ridicule.

To be actionable for libel, five elements must be present:

1. Defamation.
2. Identification.
3. Communication (publication/broadcast).
4. Fault (malice or negligence) – regular people need to prove negligence, public figures like elected officials, celebrities, etc. must prove *actual malice*.
5. Damage (in the absence of fault, provable damages or injury). Damage is actual harm to personal or professional reputation, loss of business or employment opportunities, etc.

New York Times vs. Sullivan is the 1964 U.S. Supreme Court decision that said public figures must prove actual malice to win a libel case.

Libel has four defenses:

1. Truth.
2. Privilege.
3. Fair comment.
4. Retraction (a full and prompt apology that helps mitigate damages).

Privilege is a legal principle/special legal protection that allows certain communications or information to be kept confidential and not disclosed in legal proceedings or other contexts where it applies. Judicial proceedings are privileged and cannot be cause for libel.

Fair comment: This privilege insulates a reporter or media outlet against defamation (libel or slander). Fair comment is not a license to circulate derogatory information. The information must be related to community interest about the subject. Fair comment is a recognized defense against a libel action and is 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.

Privacy

Right to privacy, which ensures an individual's right to be left alone, is an important legal principle for public relations professionals to know. This right may be violated if names, likenesses and/or information are used for commercial purposes. Securing permission from the individual via a waiver or release protects the public relations professional and the organization. While the use of employee photos in employee publications isn't specifically covered, protecting your employees' right to privacy by obtaining signed waivers is a good idea.

Privacy 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 news reporting because of the potential for direct profit.

Four kinds of wrongful acts can violate privacy:

1. **Appropriation:** Taking some element of a person's name or likeness for advertising or trade purposes without consent. An example would be using a celebrity's photo without permission and signed releases.
2. **Intrusion:** Invading a person's solitude such as audio or video recording him or her without permission.
3. **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.
4. **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.

Legal + Digital

Existing laws and legal principles apply to the online environment. It's a consistent struggle to keep up with the internet, especially because laws are typically written after a problem is realized. Here are laws and practices that specifically apply to online communications.

CAN-SPAM Act (2003): A U.S. federal law that sets rules for commercial email communications, requiring senders to include opt-out mechanisms, provide clear sender identification and refrain from deceptive or misleading email practices.

Communications Decency Act (1996), is part of the larger **Telecommunications Act of 1996**. Its Section 230 provides immunity from liability for user-generated content to online platforms. CDA also restricts certain types of content and has done much to shape the legal landscape of the internet.

Digital Millennium Copyright Act (1998): A U.S. digital rights management law created an updated version of copyright laws to deal with special challenges of regulating digital material. Broadly, the DMCA aims to protect the rights of copyright owners and consumers. It requires notice and takedown systems for copyright complaints.

Federal Communications Commission (FCC) and the Federal Trade Commission (FTC) have guidelines for influencers and content creators that mandate disclosure of paid endorsements or sponsorships to ensure transparency and prevent misleading advertising practices on social media and other platforms. These change more frequently than new laws are created by legislation.

General Data Protection Regulation (GDPR) (2016) is a European Union regulation that governs data protection and privacy for individuals within the EU, establishing rules for the processing of personal data and requiring transparency, consent and data protection measures from organizations handling such data. U.S. organizations doing business online in European Union nations must comply with GDPR.

Creative Commons licensing (2002) is not a law, rule or requirement. It is a flexible licensing system that allows creators to permit others to use their work under specific terms and conditions. Creative Commons licensing makes it easier for creators to share and collaborate while retaining certain rights. It's not a replacement for copyright, it works within it. Because copyright is inherent to any work created in fixed form, instead of marking creations with © + name + year, those who choose to use Creative Commons Licensing mark their work with a series of symbols that begins with CC and then subsequent icons showing the terms.

BY – Credit must be given to the creator.

NC – Only noncommercial uses of the work are permitted.

ND – No derivatives or adaptations of the work are permitted.

SA – Adaptations must be shared under the same terms.

Public Information/Records Requests

Public information is data/documents/records accessible by the general public to ensure transparency and accountability in government. Public records requests are formal requests made by individuals or organizations to gain access to public records or information. There are legal limitations, for example, classified information, personnel information, information prohibited from disclosure by another law, trade secrets or financial information, privileged communication, private information, etc. The **Freedom of Information Act (FOIA)** applies at the federal level; states have their own **public records laws** and local ordinances may also apply. This is important to PR practice for requestors and because government practitioners are often intermediaries for records requests (especially when media make those requests) and need to understand what applies, record keeping and internal access, how to protect sensitive information, what types of information should be proactively released, etc.

ETHICS and LAW: Additional Resources (beyond *The Bookshelf*)

Arthur W. Page Center (n.d.). *Public relations ethics training.* Retrieved Aug. 23, 2023, from www.pagecentertraining.psu.edu/

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KEYS TO ETHICS and LAW

- Prioritize truth and honesty in all communication.
- Consider the broader impact of actions and decisions (stakeholders, industry, society).
- Avoid conflicts of interest through transparency and disclosure.
- Respect individuals' privacy and maintain the confidentiality of sensitive information.
- Understand and comply with relevant laws, regulations and agency rules.
- Respect intellectual property.
- Adhere to professional codes of conduct.
- Stay up to date on ethical and legal issues that can impact the practice of public relations.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Defining values.
- What would you do?

Business Literacy (15%)

Examination KSAs

Business Literacy makes up 15% of the Examination for the Certificate in Principles of Public Relations. The specific KSAs for this topic are:

- Considers current internal and external business drivers for clients or employers.
- Evaluates how industry forces and revenue/expenses affect stakeholder analysis and public relations planning.
- Determines the effect of emerging technology on business performance and communication outcomes.

In its few pages, this "Study Guide for the Certificate in Principles of Public Relations" can only offer indications of business literacy as that broad term essentially combines financial literacy (statements, budgeting, accounting), economics (supply and demand, market structures, economic indicators), data literacy (analyzing, interpreting, reporting), legal/regulatory, marketing/sales, management/leadership, etc. Whole libraries, academic degree programs like MBAs, etc., are dedicated to proficiency in business literacy. PR practitioners can't know everything and aren't expected to, but they should have a grasp of business, how its principles and regulations impact their work and how their work impacts the organization's success. Look closely at the Examination KSAs above and know that for the Certificate in Principles of Public Relations Examination, **the focus is on the intersection of business and communication**.

Business Literacy Defined

Business literacy is the ability to use financial and business information as the basis for decisions that help an organization achieve success. Business literacy permeates everything public relations practitioners do. Being business literate means understanding exactly how various organizations make money and what differentiates one organization from its competition. Business literacy includes knowing the legal, political and regulatory environment in which the organization operates and trends in employee, customer, shareholder and community relations.

Business literacy starts with an understanding of how businesses are organized. Businesses fall into three basic categories:

- **For-profit:** Publicly traded corporations such as General Motors, or privately owned companies such as Dell, that do business to make money for shareholders or owners.
- **Nonprofit:** Organizations such as certain hospitals, public radio stations, most colleges and universities, and charities that don't do business to make a profit for owners. Any surplus income derived from the business operation is used to expand the organization or support its mission. Nonprofit organizations often provide a public service.
- **Not-for-profit:** Organizations such as credit unions, mutual insurance companies and farm cooperatives that may generate revenue surpluses but are not designed to earn money for owners or members. Surplus revenue is generally used to carry out operations. If fiscal reserves become large enough, however, some money may be returned to member-owners.

The concept of **Sectors** is important to business literacy. You'll sometimes see references to the *public sector* (government and related), the *private sector* (business), or the *nonprofit sector* (charities and others). The Global Industry Classification System takes that further. Created as a categorization system for publicly traded companies, GICS is a four-tiered industry classification system with 11 sectors (energy, materials, industrials, consumer discretionary, consumer staples, health care, financials, technology, services, utilities and real estate) followed by industry groups, industries and sub-industries. Commerce occurs up and down within each sector — e.g., contracting company, suppliers/vendors, customers, etc. — and across sectors. Having a basic understanding of these, and what sector your organization is in, helps practitioners' business literacy via comprehension of economic systems. This helps with tailoring communication and media relations, audience segmentation, crisis management, competitor analysis, client relevance, business development, keeping abreast of trends, etc. Sectors are systems that interconnect, and often that intersection is where communication needs are greatest, for example, communicating compliance or public engagement. Most federal grants require public engagement, so there are outreach and reporting requirements no matter if that grant is held by a corporation, small business, another government agency, a nonprofit, etc.

Businesses are integrated horizontally or vertically, In horizontal businesses, production unit create similar outputs. An example would be a brewer that produces beer under many different labels. ***Vertical*** businesses control all parts of their supply chains. For example, a newspaper publishing company could own forests, run logging operations to supply wood for making paper, operate wood-pulp plants to manufacture newsprint, maintain truck fleets for transporting newsprint to newspaper printing plants, and run other trucks for delivering newspapers to distribution points.

The specific organizational setup of each business determines corporate culture, operational efficiency, and effectiveness, market responsiveness, employee engagement and morale, and approaches to decision-making. In some companies, decision-making is centralized. In others, decision-making is decentralized.

How businesses make decisions is also important. In ***centralized*** decision-making, a top-level leadership group sets organizational policy and direction. This approach facilitates coordination across the enterprise, helps ensure decisions are consistent with organizational objectives and across all units, makes organizational change easier, and avoids duplication of activities. But this top-down management method can create distance from market and customer needs as well as hamper customization required in regional markets.

In ***decentralized*** organizations, decisions are made in operating units across the organizations. This "horizontal" or "flat" approach promotes flexibility and market responsiveness, increases control over specific markets or products, creates a greater sense of autonomy within operating units, and broadens a sense of accountability and ownership. But decentralized decision-making can create organizational silos that hinder interaction and cooperation between units, hamper efforts to maintain product uniformity and permit duplicate functions to emerge.

Some businesses practice CSR or CSA. **Corporate Social Responsibility (CSR)** is when a business voluntarily takes on initiatives and actions to operate ethically and contribute positively to society beyond their primary goal of making profits. The Coca-Cola Company's water stewardship initiative and the steps Apple has taken with its labor practices abroad are examples of CSR. **Corporate Social Advocacy (CSA)** is when a business proactively takes a public stance on social or political issues via philanthropy, lobbying or otherwise promoting social change. Ben & Jerry's practices CSR and it has a strong emphasis on CSA with a "social mission that seeks to meet human needs and eliminate injustices in our local, national and international communities by integrating these concerns in our day-to-day business practices" and its activism related to "racial justice, fair trade, reimagine criminal justice, campaign finance reform, non-GMO standards," etc. Proactively taking stances on social issues can be good or bad for an organization — leadership needs to weigh the benefits and risks before making such decisions as they can be polarizing, for example, Gilette's "We Believe" campaign against toxic masculinity, aka, "the best a man can be."

Basics of financial literacy are also important to business literacy. Practitioners, whether managers or not, need to understand **budgets**. Building an organizational budget involves estimating expected income and expenses to determine profitability. The organization sets an overall budget and once it's established, departments within the organization create their budgets based on allocated resources and objectives. These departmental budgets detail how funds will be spent on specific activities or projects. Regular monitoring and financial reporting ensure that actual income and expenses align with the planned budget. It's important to manage income and expenses effectively — i.e., you can't spend more than you bring in or are allocated. In the private sector, the goal is to generate a profit; in the public and nonprofit sectors, it's to not spend more than is brought in and/or have unspent funds available to meet their mission/obligations.

Managers commonly use three types of financial statements to track the status of business operations:

- **Balance sheet:** A statement of assets, liabilities, and capital on a specific date. The report details the balance of income and expenditure over the preceding accounting period.
- **Income statement:** A summary of how a business generates income and expenses through both operating and non-operating activities; also known as the profit-and-loss statement or P&L.
- **Cash flow statement:** A report of how changes in balance-sheet accounts and income affect cash and cash equivalents (cash in and out). The report breaks the analysis down by operating, investing and financing activities. Cash flow may be positive or negative.

Basics of data literacy are important to business literacy because collecting, understanding, analyzing, using and reporting data so others can understand it and good decisions can be made helps to further organizational goals. Types of data and RPIE uses of data are discussed in the RESEARCH SECTION of this guide.

Contracts and agreements occur regularly and it's important to know that only certain people within an organization are authorized to execute contracts on behalf of the organization. Contracts are legal documents that specify who'll do what, for what purpose, how payment will occur, which laws apply if something goes wrong, etc. Contracts can be complex legal documents or more simple letters (agreement, memorandum of understanding), but once signed, they are binding. So always be careful about what you sign and be sure you have the authority to do so! Contracts typically cover the purpose, the offer and acceptance (what's agreed to, scope of work, tasks expected, etc.), consideration (payment info or description of value exchanged), terms and conditions, and legally binding language. Legal review of any contract before signing is a good business practice.

Many public relations positions do not offer frequent opportunities to cultivate knowledge of business strategy, operation and management. That's why taking the initiative to broaden your knowledge in this area is important. 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. You 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.

Understanding how business works generally, including contracts, intellectual property, employment laws, management and leadership principles, project management, key performance indicators, finances, data, etc., is important for PR practitioners who may have to interpret this information for the public. It's especially important for managers.

Business needs both **management and leadership;** they aren't the same thing, though sometimes, they do exist within the same person. A popular quote from Stephen Covey, author of "Seven Habits of Highly Effective People" helps differentiate the two: *management is efficiency in climbing the ladder of success, and leadership determines whether the ladder is leaning against the right wall.* Management involves planning, organizing and controlling resources to achieve business goals. Managers have formal positions within an organization. Leadership inspires and influences individuals to pursue a shared vision. Leaders can emerge from any level within the organization and may not have formal authority, but they're the people others want to follow.

Encouraging understanding and acceptance of people from diverse backgrounds is at the core of many companies' cultures. Managing diversity has moved far beyond affirmative action and other mandated efforts toward inclusion. Diversity, equity, inclusion, access and belonging (DEIAB) is achieved when a business recognizes the strengths of its various publics and employees and chooses strategies based on these strengths and perspectives. (Fiske, 2004)

Business literacy helps practitioners:

- Better understand, communicate and contribute to organizational goals and objectives.
- Determine, collect and use data from key performance indicators that matter to the organization to improve effectiveness.
- Align communication efforts to organizational strategy and contribute to the bottom line.

- Craft compelling messages; explain complex ideas that appeal to internal and external publics.
- Assess risks, make informed decisions and grasp the potential impact of a crisis on organizational reputation, stakeholders, financial health, etc.
- Understand the competitive landscape and work to position the organization appropriately.
- Remain compliant with legal standards for the profession as well as with relevant laws and regulations for the industry in which the organization operates.
- Network and collaborate with colleagues in other departments or organizations.
- Interpret information relating to the business for its various internal and external publics.

Key business laws and regulations for PR professionals

Accommodations

The **Americans with Disabilities Act (1990)** prohibits discrimination against people with disabilities in multiple areas: employment, transportation, public accommodations, communications and access to state and local government programs and services. Accessible design means accessibility for those with accommodation needs, from sidewalks and entryways of buildings to online communication. Practitioners need to make sure their work is compliant with Web Content Accessibility Guidelines (WCAG) for example, by enabling the accessibility features on websites and mobile apps, by filling in the *image alt text* when uploading images or graphics so that accommodation tools will be able to describe the image to a visually impaired person, etc.

Fair business practices

Anti-trust: The Sherman/Clayton Act (1914) and Robinson Putnam Act (1936) make engaging in activity that ruins competition illegal. Overselling wording in news releases announcing acquisitions and divestitures can be cited as violations.

The **Federal Trade Commission Act (1914)** established the FTC, which is designed to protect consumers, ensure fair competition and prevent unfair competition as well as unfair or deceptive practices affecting commerce in the United States.

Conflicts of interest occur when individuals or organizations have competing interests that impede or compromise their impartial decision-making ability. These can involve financial or personal interests. Codes of Ethics and professional guidelines for disclosure disallow or discourage these. Beyond that, laws and rules apply through the Securities and Exchange Commission, anti-corruption laws, government ethics laws (federal, state, local), etc. Conflicts of interest damage reputation and trust.

Employment laws abound: anti-discrimination, wage and hour, occupational safety, workers' compensation, equal pay, benefits, family medical leave, union/labor relations, privacy, harassment, working conditions, etc. These are meant to ensure fair practices and prevent retaliation if an employee brings a complaint. Every manager needs to understand and comply with applicable employment laws. For all rules related to anti-discrimination (application, employment, post-employment), federally protected classes are race/ethnicity, color, religion, age (40+), national origin, sex (includes pregnancy, sexual orientation/gender identity), disability, genetic information and military status.

Fair Labor Standards Act (1938) establishes payment standards including minimum wage, overtime pay, recordkeeping, youth employment standards, etc. It affects full-time and part-time workers in the U.S.

Equal Pay Act (1963) requires that males and females doing similar jobs under similar conditions should be paid the same.

Fact Sheet #71, by the Department of Labor Wage and Hour Division, provides a test for unpaid interns and students. (Exemptions are nonprofit or public sectors where volunteer service occurs without an expectation of compensation.) Fact Sheet #71 says that interns should be the primary beneficiaries of internships and should be either paid at least minimum wage or get course credit as a learning experience, or both.

PII (personally identifiable information), **HIPPAA** (Health Insurance Portability and Accountability Act) and **FERPA** (Family Educational Rights Privacy Act) laws protect sensitive information. PII refers to the kind of information that can be used for identity theft and is generally considered sensitive, like full birthdays, social security numbers, etc. HIPPAA additionally protects health information like medical records, treatment history, medical payment records, etc. FERPA additionally protects student records like grades, transcripts, disciplinary records, etc. Organizations should protect these facts about employees and customers. There are penalties related to HIPPAA and FERPA violations. In some instances, information covered by HIPPAA and FERPA can be shared with the proper permission of those impacted, but generally, public relations practitioners should always protect, not disclose, this type of information.

Whistleblower laws are designed to protect individuals who report misconduct, illegal activities or violations of laws and regulations in organizations. Should an organization be the subject of a whistleblower report, there are obligations/protections of which to be mindful, particularly, confidentiality (the organization cannot expose the whistleblower) and anti-retaliation protections for the whistleblower.

Federal agency rules carry the force of law

Rules/Regulations created by federal agencies have the same legal authority and impact as laws passed by Congress; they're legally binding and must be followed by individuals, businesses and organizations within the agency's jurisdiction. Here are just a few examples of federal agencies whose rules are designed to protect consumers, ensure fair competition and maintain the integrity of business communications. Failure to comply with federal (+ state and local) regulations can result in legal consequences including fines, penalties and legal action. Note that this is not an exhaustive list, it's a brief overview of agencies' oversight applicable to PR practice.

Bureau of Alcohol, Tobacco and Firearms Regulations governs the advertising and labeling of alcoholic beverages including requirements for health warnings and alcohol content disclosure as well as where and how these can be promoted.

Consumer Product Safety Commission (CPSC) Regulations set standards for product safety and may require recalls or warnings for products that pose safety hazards.

Department of Labor sets standards for fair employment practices, anti-discrimination and more.

Environmental Protection Agency (EPA) Regulations require businesses to accurately represent their environmental claims.

Federal Communications Commission (FCC) Regulations cover broadcast television and radio, including rules on obscenity, indecency and sponsorship disclosures.

Federal Trade Commission (FTC) is the primary agency to oversee commerce in the U.S. Its **Guidelines on Endorsements and Testimonials** and **Truth in Advertising Standards** dictate how claims, endorsements, testimonials and reviews must be presented, especially in paid media, which helps ensure transparency and prevent deceptive practices.

Food and Drug Administration (FDA) Regulations govern the promotion and labeling of food, drugs, cosmetics and dietary supplements to ensure product safety and to prevent false claims.

Securities and Exchange Commission (SEC) Regulations impact communications related to investment products to ensure that information with the potential to affect stock prices is shared equitably, that important risk disclosures are made, and govern how publicly traded companies report information.

U.S. Postal Service (USPS) Rules govern the use of the mail including standards for bulk business mail, addressing and delivery requirements.

Political contributions

The **Federal Election Campaign Act (1971)** requires public disclosure of funds raised, restricts contributions and expenditures, etc. **Federal Corrupt Practices Act of 1925, the Hatch Act of 1939**, and the **Taft-Hartley Act of 1947** govern labor relations management. These laws prevent organizations, including unions, from contributing to any political campaign or candidate and prohibit any candidate from accepting such contributions. Organizations and unions have formed political action committees (PACs) to get around these prohibitions. PACs are legal because employees or union members, not the organization itself, fund them. The **2010 Citizens United U.S. Supreme Court decision** changed the rules by which corporations, unions and other organizations can contribute to political causes and effectively removed additional restrictions, leading indirectly to the creation of Super PACs that can raise and spend unlimited funds to influence elections or legislation.

Representation disclosure requirements

Foreign Agents Registration Act of 1938 requires that public relations practitioners working for any "foreign principals," whether the practitioners are directly lobbying U.S. government officials or not, must register with the U.S. State Department under this act. Anyone who acts in the United States as an agent of a foreign government without proper registration can suffer stiff penalties. This law grew out of practices by Carl Byoir and Associates in the 1930s on behalf of Nazi Germany and changed how public relations was practiced.

Federal Lobbying Act (1913) requires lobbyists to register with the clerk of the U.S. House of Representatives or the secretary of the Senate between the first and tenth day of each quarter. A lobbyist must report the amount of money he or she received during the previous quarter for lobbying activities. The lobbyist must name publications in which he or she has had an article or editorial published on behalf of the person or organization for which he or she is lobbying. This requirement does not apply to newspapers in the regular course of business. Cases indicate that this act applies only if a person is aiding in the passage or defeat of legislation, which public relations practitioners often do. Legal statutes for lobbying state lawmakers vary by state.

Lobbying Disclosure Act of 1995 relates to the 1938 act in a broad context by requiring anyone in a public relations or related position who represents a foreign government to register and label lobbying materials as "political propaganda."

Most states also have **lobbyist registration requirements**. (See the National Conference of State Legislatures requirements summary by state.)

Some Securities and Exchange Commission (SEC) Rules

These rules apply to U.S. publicly traded companies — i.e., those whose stocks are bought and sold on the New York Stock Exchange and NASDAQ.

A 1963 SEC study of the securities market defined insider trading, material information and violations of each. Rules against insider trading encourage timely disclosure of material information in a further attempt to level the playing field between small and large investors. ***Material information*** is any information that could influence a reasonable investor's decision to buy or sell stock. The study showed concrete examples of how public relations practitioners used news media to disseminate false and misleading information or deliberately withheld information from news media.

Quiet Period: The interval between when a company registers a public offering of securities (stocks or bonds) with the SEC and the time the SEC declares the registration effective. At that point, the company can offer the securities for sale. During a Quiet Period, a company generally can't issue any information that might affect the stock price or be perceived as "front-running" the stock offering.

Proxy rules apply to how companies communicate to shareholders regarding their proxy votes for matters that shareholders must vote upon. These directly affect communicators at publicly traded companies.

Regulation Fair Disclosure, Regulation FD or Reg FD (2000) requires all publicly traded companies to disclose material information to all investors at the same time. *Material information* is any news that could influence a reasonable investor's decision to buy or sell stock. Consequently, a company can't share material news with only a limited audience (such as selected reporters); rather, the company must disclose that information in ways that ensure everyone has equal access at the same time.

Sarbanes-Oxley Act (2002) covers corporate auditing accountability, responsibility and transparency. The law, often called SOX, was enacted after the revelation of accounting scandals at Enron and other major corporations between 2000 and 2002. Enron's CEO and CFO claimed they were not aware of the fraud the corporation had committed. SOX requires the CEO and CFO to sign certificates that say they have read and understood everything in company reports and that reports are complete and accurate. Other SOX provisions affect how information is disclosed and, therefore, affect public relations practice. Knowledge of what and when one's company must disclose is critical to executing public relations responsibilities.

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 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 the "gag period" — because these materials could be construed as an effort to sell a newsecurity. The *gag period* should not be confused with a blackout. Several types of blackouts exist in contracts, policies and business activities. Two common blackouts relate to employee benefits and political campaigns. A human-resources blackout is a temporary period during which access, often to retirement or investment funds, is limited or denied. In addition, a blackout can refer to a political party's restriction on advertising for a set period 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. SEC regulations don't specifically enforce or prompt timely disclosure, but 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 standard applies to all publications including speeches, releases and all published materials.
- **SEC Form 8-K** provides current information about a corporation so investors can make informed buying decisions. Companies must file Form 8-Ks within four business days of corporate actions that would materially affect stock prices. Information is "material" whenever a reasonable investor would consider the news important in making an investment decision. Issuing a news release and then filing that news release on a Form 8-K is an appropriate way to make a fair disclosure.
- **SEC Form 10K,** commonly called the "annual report," offers a detailed picture of a company's operations, the risks the organization faces, and financial results for the fiscal year. The report includes an analysis by company management of the business results and what is driving them.

BUSINESS LITERACY: Additional Resources (beyond *The Bookshelf*)

Equal Employment Opportunity Commission (n.d.). *Who is protected from employment discrimination?* Retrieved June 30, 2023, from www.eeoc.gov/employers/small-business/3-who-protected-employment-discrimination#:~:text=Applicants%2C%20employees%20and%20former%20employees,(including%20family%20medical%20history).

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KEYS TO BUSINESS LITERACY

- Understand the business landscape, particularly within your industry or sector, well enough to align PR strategy with business goals.
- Continuous learning, professional development and efforts to stay current help practitioners stay relevant.
- Learn financial, economic, data and management basics.
- Understand legal and regulatory requirements well enough to ensure compliance.
- Understand the financial implications of reputation damage from crises.
- Embrace data-driven public relations using key performance indicators to measure the impact of PR efforts on business; to make decisions and offer recommendations.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Business literacy scavenger hunt.
- You can/can't do that.
- Taking positions.

Communication Theories and Models (10%)

Examination KSAs

Communication theories and models account for 10% of the Certificate Examination questions. The specific KSAs for these topics are:

- Demonstrates familiarity with communication theory and public relations research that guides planning, prioritizing the publics, developing messages, selecting spokespeople and establishing credibility and trust.
- Determines how messages are interpreted by different publics and how those publics are or are not moved to action after they receive those messages. Interprets how semantics, cultural norms, timing and context may affect how messages are understood.

Importance of theories and models

You probably had to take a theory class in your degree program. But what's that got to do with your becoming a great PR practitioner or social media manager? EVERYTHING!! A bunch of smart people figured some things out before any of us were even in the world; theories and models are their giving us a head start on what's known about the field until better understandings come along (via scientific method). Think of theories and models like diving boards; if you jump into a pool from the side you'll get only so far, but if you jump in from a diving board, you'll get farther faster — OR — think of them like your phone's GPS; they help us navigate and understand our field, avoid wrong turns and reach our destination. PR work that is underpinned by theories and models is likely to be successful because it helps with practitioners' "understanding, organizing and integrating the many activities and purposes of public relations," ("Effective Public Relations 11th" p. 148).

Theories and models are our best explanations until the scientific method provides us with better ones or they become so accepted that they're considered rules or principles.

THEORIES are the big ideas or concepts that explain why things are the way they are — they're generalized conclusions that have been analyzed/tested and are accepted to explain or predict given phenomena.

MODELS are simplified visual or verbal representations of systems, processes or phenomena — they're the practical tools or frameworks we can use to make things work or work better.

For example, in public relations, Situational Crisis Communication Theory is a theory, RPIE is a process model, and the necessity of building/maintaining trust and credibility with the public is a rule (principle).

Good theory drives good practice. Many theories from communication and the social sciences (e.g., psychology, sociology, consumer behavior) can be the basis for a public relations program, and many of these theories are described in the textbooks on *The Bookshelf*. You should be familiar with major theories guiding public relations work.

Some theories and models

The information below shows some — but definitely not all — theories and models used in public relations.

Grunig-Hunt Models of Public Relations Practice (1984)

Each of these models illustrates a common way that public relations practitioners approach their work: 1) press agentry/publicity, 2) public information, 3) two-way asymmetrical, or 4) two-way symmetrical. James Grunig and Todd Hunt introduced these four models of public relations practice in the book "Managing Public Relations" (1984) and now they're part of Excellence Theory. When these were introduced, there were far fewer ways that organizations and their publics could interact — the internet as we know it didn't exist! These have been tested and reexamined (again, scientific method), and research since 1984 has shown that these models continue to describe the way many organizations approach public relations. Now, with our many digital options, two-way communication between organizations and their publics is commonplace as we grow more participatory online.

Few organizations follow one model exclusively. Depending on the situation, many organizations use all of them. The table below summarizes the points of each model.

Characteristics	Press agentry/ publicity	Public information	Two-way asymmetrical	Two-way symmetrical
Purpose	Promotion	Report information	Scientific persuasion: The goal is to get people to do what the organization wants.	Mutual understanding, two-way influence
Nature of communication	One-way to an undefined audience. Truth and accuracy of information are not essential.	One-way dissemination of factual, newsworthy information to an undefined audience. Truth and accuracy are essential. Journalistic reporting standards apply.	Two-way: Audience research helps determine actions and craft messages designed to achieve specific behavioral goals.	Two-way with balanced influence (win-win situations). Audience research determines actions that will promote understanding and reduce conflicts with key publics. Publics are as likely to influence the organization as the organization is likely to influence the publics.
Intent of communication	Influence thoughts, behaviors.	Education	Influence thoughts, behaviors.	Mutual benefit
Nature of research	None. Information about publics isn't essential.	Little. May monitor public opinion polls or the readability of messages.	Formative research on audience opinions and motivation. Information collected on audiences is not used to modify the organization's goals, policies or actions. Research simply guides message crafting.	Ongoing research to adjust messages throughout interactions with publics. Information collected from audiences may influence what an organization does and says.

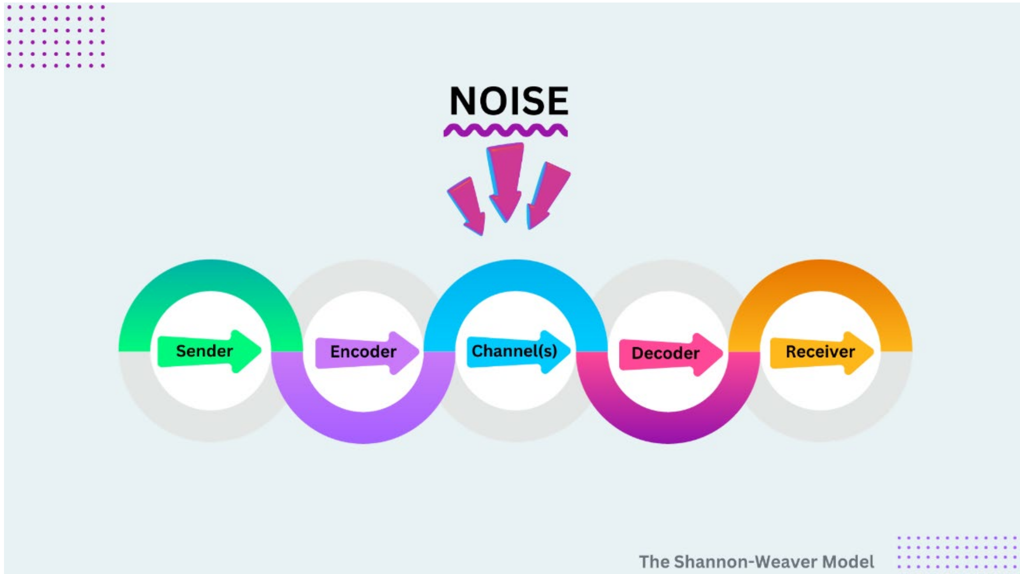
From Douglas F. Cannon, Ph.D., APR+M, Fellow PRSA.

What exactly is Communication?

Communication is the process of understanding and sharing meaning. Practitioners can put messages out into the universe, but that doesn't mean that communication has occurred (one reason why outputs are a lower-level metric). Influential political scientist Harold Lasswell (1948) famously used a question to summarize the communication process: ***Who • says what • to whom • through which channel • with what effect?*** We can study/consistently work to perfect each of these five points, and communication failures can stem frombreakdowns at any of these points.

Shannon & Weaver Communication Process Model (1948)

The simplest model of communication reflects the work of two mathematicians named Shannon and Weaver, who developed this model in 1948 to show how communication by telephone works.



The model consists of a sender, a message, a channel through which the message travels, noise or interference that impedes or distorts the message, and a receiver. For example, a 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. The electrical signals are converted back into sound and speech. However, noise can interfere with the signal and create problems in understanding the message.

As you develop specific messages, you should consider each part of this model. All elements must work effectively for receivers to get the intended message. Often communicators blame the audience for not accepting a message when the sender, encoding process or channels chosen were not appropriate. Although originally designed to describe telephone communication, the Shannon-Weaver model can apply to other forms of communication as well.

- *Speech:* Thoughts are encoded into words, transmitted by sound waves and decoded according to the receiver's understanding of the words — if that person is within earshot. Physical noise can affect how well the receiver hears the words. Internal noise (such as lack of attention, lack of interest or distraction) can affect decoding and understanding as well.
- *Nonverbal communication:* Gestures encode thoughts. Light transmits the scene. Receivers decode the body movements based on the interpretation of the person's actions. Anything that prevents receivers from seeing or understanding the gestures or body language would constitute noise.
- *Text:* Thoughts are encoded into words of a specific language. Those words are further encoded into typographic characters and transmitted via a printed page. If receivers can read and know the encoded language, they can decode the words. If receivers understand the vocabulary, they can understand the message. Noise can enter the process at each step. Poor word selection or misspellings can affect encoding. Poor quality printing can make words hard

to read. Lack of reading ability or lack of familiarity with the language or vocabulary used to encode the message can affect decoding and eventual understanding.
- *Images or graphics:* Thoughts/words are encoded into graphics. Receivers decode the graphics based on their interpretation of the symbols/icons, etc., presented. If the imagery is not universal, messages can be missed or misinterpreted.

We can apply the Shannon-Weaver model to audio/video, photography, art, music, drama, signs, symbols, graffiti, emojis and the countless other ways humans transmit thoughts and meaning. It was expanded upon as we learned more (again, the scientific method at work).

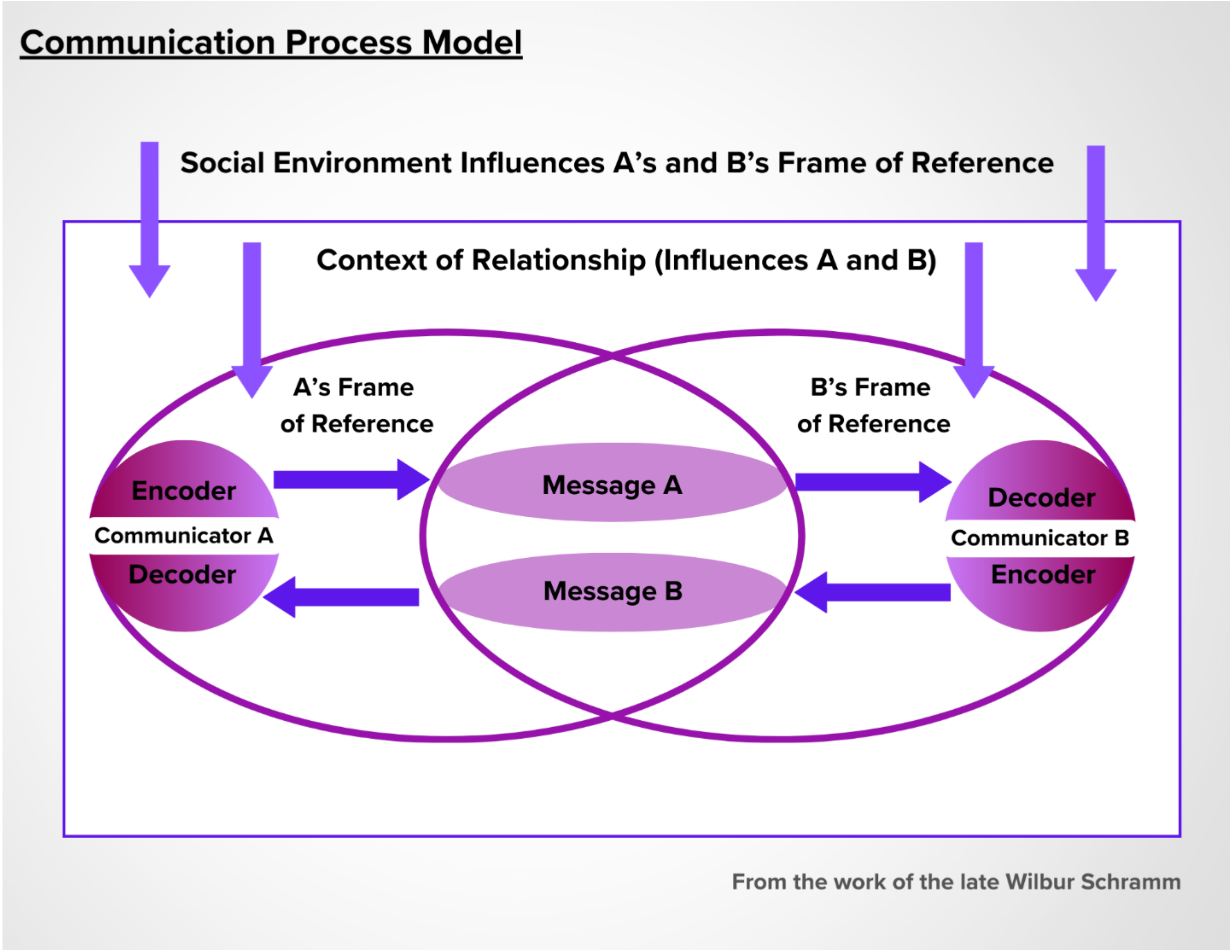
Schramm's Communication Process Model (1954)

Schramm recognized that the basic early model was missing key variables — *feedback* and *frame of reference*.

- **Feedback** refers to the process of receiving and interpreting responses or reactions to a message, which can be verbal or non-verbal, and using that information to adjust and improve communication. Without feedback, you don't know if receivers have received or understood your message.
- **Frame of reference** is the unique experiences, perspectives, backgrounds and beliefs that an individual brings to a conversation, influencing how they interpret and understand messages and how they communicate their own ideas. *Similar* frames of reference enable communication; *disparate* frames of reference make it more difficult because barriers harm the potential for understanding and sharing meaning.

Schramm's version of the communication process model (below) incorporates these concepts and recognizes that cultural and other barriers between people, not just physical noise, can impede communication.

"Effective Public Relations 11th" says: "As the late Wilbur Schramm pointed out, communication is complicated by people: '*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,*' " (p. 169).



You can see all parts of Lasswell's famous question in both the Shannon & Weaver and the Schramm models: *Who* **(source)** *says what* **(message)** *to whom* **(receiver)** *through which channel* **(how the message is distributed)** *with what effect* **(outcome/result)**?

Some Barriers to Communication

As noted in "Effective Public Relations 11th edition" (p. 306), Walter Lippmann, author of the 1922 seminal work, "Public Opinion," described several communication barriers:

- Artificial censorship.
- 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.

The Bookshelf of texts offers additional lists/explanations of barriers, including:

- Distractions/Lack of attention.
- Selective perception.
- Language barriers (language, vocabulary).

- Cultural differences (misalignment of messages with culture and values; assumptions or stereotypes).
- Physical barriers (noise, physical disabilities or impairments).
- Emotional barriers (affinity, anger, fear).
- Lack of clarity (fuzzy or obfuscating language).
- Message distortions: withholding information, disinformation, misinformation.
- Information overload (overwhelming amount of messages/limited bandwidth for interpreting).
- History of distrust.
- Negative influencers.
- Sources or spokespeople with no credibility.
- Unreliable media.
- Media with which people are not comfortable (digital divide, illiteracy/low literacy).
- Captive audiences.
- Gatekeepers.

Ways to Overcome Communication Barriers

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

- Define your publics, including subsets or segments.
- Identify your social relationship with each public.
- Understand the context and frames of reference of your relationships.
- Encode your messages effectively.
    - Design and deliver the message so that it gets the attention of the intended audience.
    - Employ signs, images and symbols that relate to experiences that are common to senders and receivers. Appeal to the self-interests of receivers — i.e., address WIIFM? (What's in it for me?).
    - Arouse personality needs in the receiver (social status, altruism, etc.).
    - Offer ways to meet those personality needs that are appropriate to the group situation the receiver is in at the time you want that receiver to respond (status appeal, youth appeal, fear appeal, etc.).
- Choose the proper medium to convey your messages.
- Determine metrics/feedback mechanisms to ascertain your effectiveness.

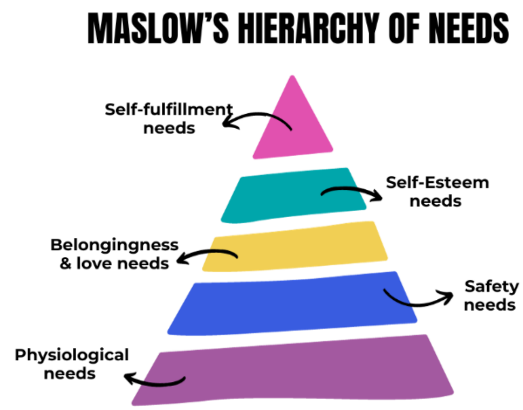
Apply the **Seven Cs of Communication**, which was first coined by Cutlip and Center in 1952's "Effective Public Relations 1st," but note that the list has been refined over time ("Effective Public Relations 11th," *p. 308–309):*

1. **Clarity:** Words mean the same for receiver and sender; ensure the message is clear and easy to understand.
2. **Credibility** of the message and the source — performance drives organizational message.
3. **Content** has meaning for the receiver; accurate, truthful.

4. **Context:** Message must square with the realities of its environment.
5. **Continuity/Consistency:** Repetition, similarity of message, organization speaks with one voice.
6. **Capability** of the audience. Be sure receivers can understand; don't expect much effort to decode.
7. **Channels:** Use appropriate channels that receivers use and respect; different channels have different effects.

Not all lists on the internet have the same seven Cs. Additional Cs in various lists include Complete, Concise, Courteous, Coherent, Concrete, Considered, and there may be more. Some people treat the Seven Cs of Communication like a checklist before they finalize/distribute information to the public on behalf of the organization.

We can attempt to lessen communication barriers by meeting people where they are with messages that resonate with them.



Maslow's Hierarchy of Needs is a psychological theory that arranges human needs into a pyramid with basic physiological needs at the bottom and higher-order needs at the top. Lower-level needs must be met before self-improvement goals like education or personal growth. Think about how hard it would be to care what color your kitchen is painted or whether you have the newest/coolest kitchen gadgets if you're having a hard time putting food on the table.

Understanding and speaking to common human needs is relevant to PR because practitioners can tailor their messages and address the specific needs of target audiences better with knowledge of what is important to everyone.

- **Physiological Needs:** Water, food, shelter, clothing, sleep, etc.
- **Safety Needs:** Personal safety, financial security, health and protection from physical or emotional harm.
- **Social Needs:** Connections, like love, friendship, family, a sense of belonging and acceptance.
- **Esteem Needs:** Self-esteem and recognition through achievements, status and respect from others.
- **Self-Actualization:** pursuit of personal growth, creativity, self-fulfillment; realizing one's full potential.

Communication and Culture

Communication and culture are intertwined. People are different. Understanding cultural differences (and valuing differences) is important to PR because it helps overcome communication barriers and helps practitioners be better communicators.

Culture and diversity should be central to public relations programming. Practitioners need to understand the values, attitudes and beliefs important to all publics an organization serves. For example, in the health arena, culture can affect the effectiveness of health promotion, disease prevention and management, early detection, access to health care, trust and compliance (Satcher and Pamies, 2005).

Public relations practitioners equipped with culturally proficient communication models, messages and tools can influence an organization's publics by addressing the unique needs of each.

Geert Hofstede, a management researcher, created **Hofstede's Cultural Dimensions** (1980), based on patterns uncovered in global research. Six dimensions of culture classify nations' values. They're measured on a scale of 1 to 100 with contrasting words on either end:

- **Individualism/Collectivism:** Personal achievement vs. group success (I vs. We).
- **Power distance (high/low):** How much authority and hierarchy exist. (if it's OK to call a boss by his/her first name, there's probably low power distance in an organization.).
- **Femininity/Masculinity:** Nurturing, quality of life, relationship orientation vs. competition, achievement.
- **Uncertainty Tolerance/Avoidance:** How people handle unknowns (go with the flow vs. we must have a plan).
- **Short-term/Long-term orientation:** Focus on the here and now vs. plan for the long haul.
- **Indulgence/Restraint:** Enjoy life's pleasures vs. serious/controlled.

Check out his website: https://geerthofstede.com/culture-geert-hofstede-gert-jan-hofstede/6d-model-of-national-culture/. It covers Hofstede's Cultural Dimensions in detail and shows the six dimensions plotted on world maps.

Why study nations? People of different cultures work together. Understanding these dimensions can help us work together better and communicate better. Culture may stem from multiple demographic and geographic sources, but national culture influences the behaviors of the people who are of that culture — it's important to have some understanding of other cultures when interacting, AND OF YOUR OWN NATION'S CULTURE when planning campaigns and messages. For example, the United States: 1) highly individualistic, 2) low power distance, 3) masculine, 4) tolerant of uncertainty, 5) mid-range for time orientation, and 6) highly indulgent.

Publics/Public Opinion

Identifying the publics is one of the first steps in planning a public relations program. Typically, you identify the publics you want to reach after you've completed research about the problem/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.

Public relations professionals refer to people or groups of "people who are somehow mutually involved or interdependent with particular organizations" as "publics" ("Effective Public Relations 11th," p. 2). The so-called "general public" includes many specific or specialized publics. 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. Publics often overlap and can be segmented in multiple ways.

Following is a list (excerpted from "Public Relations, An Overview," Vol. 1, Number 3, PRSA Foundation Monograph Series) of publics for an organization. It could be a private or publicly held business, a not-for-profit group, a government agency, an educational or religious institution, or another organization or group. Notice how the publics are identified from all sectors of a community: government/education/business and they're both external and internal to an organization.

EMPLOYEE	COMMUNITY	GOVERNMENT

Management Hourly vs. Salaried Prospective Employees Families Union members Retirees	Business locations Neighborhood coalitions Chambers of Commerce Community organizations Local government Religious organizations	Legislators Regulatory agencies Local, state and federal officials
INDUSTRY/BUSINESS Suppliers Teaming partners Competitors Professional Societies Subcontractors Joint ventures Trade associations	**ACADEMIA** Trustees, regents, directors Administration officials Financial supporters Faculty and staff members Students, prospects, alumni	**CUSTOMER** *Geographical* Local Regional National International *Functional* Distributors Jobbers Wholesalers Retailers Consumers
MEDIA General Ethnic Foreign Trade Specialized Social networks	**INVESTMENT/FINANCIAL** Analysts Stockbrokers Institutional investors Portfolio managers Shareholders Potential investors Bankers (commercial and investment)	

The Public Opinion Process

Scholar James Grunig, in his work on communication behaviors and attitudes of environmental publics, defined publics by type. He found that publics could be grouped by the way they behave toward messages and issues. He 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.

In the **Situational Theory of Publics** (1968), Grunig identified another method of labeling publics: nonpublics, latent, aware and active publics. **Nonpublics** have virtually no connection, involvement or interest in the issue at hand. **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 ("Effective Public Relations 11th," p. 268).

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.

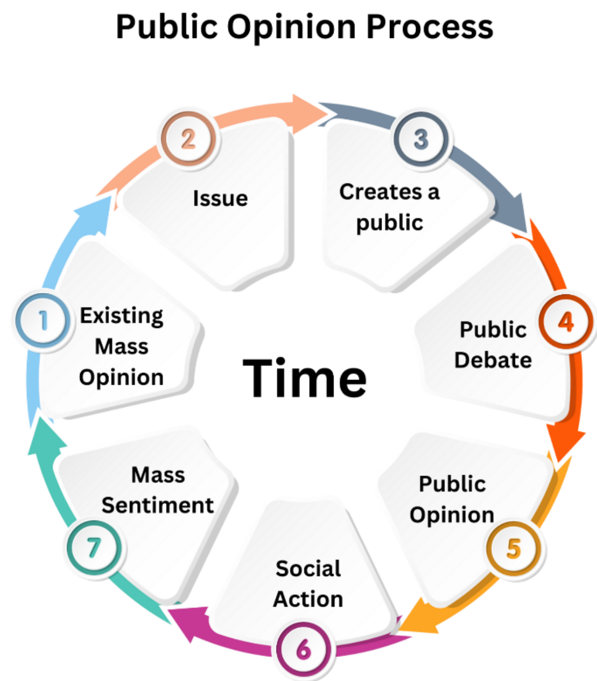
Now think about how these work together with the elements that make up public opinion: opinion, attitude, belief and value.

- **Opinions** are observable (verbal) responses or statements concerning issues or topics. Opinions are specific to a topic and time (situational and focused), rational (cognitive and objective) and changeable. Opinions can be measured directly by asking a person a question and recording the response. The response is the person's opinion.
- **Attitudes** are covert predispositions governing likes and dislikes. Attitudes are affective (emotional), rather than cognitive; subjective, rather than objective; global or general, rather than specific; and enduring, rather than changeable. Attitudes cannot be measured by asking direct questions. People often can't explain their attitudes. Therefore, attitudes must be inferred through indirect questioning about how people feel (not what they think) or through physiological responses.
- **Beliefs** are assumptions people live by. Beliefs are understandings about the way things in the world work or should be. People often have trouble explaining their beliefs in detail. Nevertheless, beliefs are building blocks of attitudes and opinions. Researchers often group beliefs into systems such as capitalism, feminism or Christian theology.
- **Values** are explicit standards for evaluating right, wrong, desirable or undesirable. Values determine what people think are important in life and, like attitudes, are usually covert. People can usually say what they think is right or wrong or what is important to them, but they usually can't explain why they make those judgments.

Reading through the definitions, you can see that each one is more systemic to the individual and becomes progressively harder to change; they're like the core of each person. If you think of these like a target, opinions are the outer ring and values are the tight circle in the middle — they're closely held. People often change opinions without changing attitudes, beliefs, or especially, their values. In short, values are what people REALLY care about and guide how lives are lived. There are some values people tend to agree on and others that can be a source of conflict. Examples of values are loyalty, honesty, kindness, compassion, hard work and perseverance. Values that are frequently the source of conflict are personal moral or ethical values or family-related values. As a communicator, it's easier to work with the values you know are there than to try to change people's values.

What happens when individual opinions merge into public opinion? A classic early model comes from the work of sociologists Lang and Lang, in the book, "Collective Dynamics" (1961):

Lang and Lang observed that in any given situation, a mass sentiment or a general social consensus exists. 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 positions on an issue and foster public and private debate. The public debate may include publicity, staged events, opinion polls, public appeals, online social awareness and advocacy campaigns, etc. This debate may lead people to make up their minds about the issue. A new public opinion may develop, and that opinion may lead to social action. That action might occur as an election vote, a consent decree by a court or a product recall by a company. A new social value may emerge and become part of mass sentiment. The time needed for this new social value to take hold is varied. Online tools and platforms, such as social media channels, may speed up this part of the process because they make grassroots organizing faster, easier and more effective. The diffusion theory of innovation addresses the adoption or rejection of new ideas and the impact of elapsed time on the process. Author Malcolm Gladwell popularized the term **tipping point** to describe the point at which a new idea, trend or behavior reaches a critical mass of support/adoption and then begins to spread rapidly among the rest of the population, seemingly becoming a new norm.



Based on material from Land & Lang, "Collective Dynamics"

Think about how the Lang and Lang model applies to public relations situations you have faced or read about. 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.

Consider, too, how hard it was to organize and spur change for the suffrage movement (women's voting; late 1800s to the ratification of the 19th Amendment in 1920), or the Civil Rights Movement (mid-20th century to the passing of the Voting Rights Act), or even the environmental movement (leading to the Paris Agreement in 2015) compared to online social movements. Organization leading to legislative action was much more difficult than it is now.

- Consider the lengthy debate about secondhand smoke in public places and laws against smoking in restaurants or even public sentiment toward smoking itself. The Centers for Disease Control and Prevention's Office on Smoking and Health has been implementing various initiatives, including funding media campaigns, aimed at reducing and preventing smoking for decades. Changed public opinion led to laws and regulations such as nonsmoking areas or outright bans on smoking in public places and it's led to significant reductions in the number of people who smoke and increases in the number of people who quit or attempt to quit using cessation resources available through 1-800-QUIT-NOW. (Read more about their work and outcomes: www.cdc.gov/chronicdisease/resources/publications/aag/tobacco-use.htm.)

- Arab Spring in 2010 demonstrated the power of online grassroots organizing. Though outcomes varied by country, it showed how social media platforms can be used to raise awareness, mobilize populations and drive political change in challenging and repressive circumstances.
- Also see, for example, the Ice Bucket Challenge (2014) www.als.org/IBC, "March for our Lives" (2018), and of course #MeToo (2017), #BlackLivesMatter (2013), and many other examples found in public relations cases texts or existing online now.

Integrated Marketing Communication

The PESO Model™ (shown and described in the Implementation portion of this guide) is essentially based on the normative rules and theories underpinning integrated marketing communication (IMC), which is a seamless, strategic approach that unifies all marketing and communication efforts to convey a consistent, clear, customer-centric message across various channels that is aimed toward achieving organizational goals. IMC involves coordinating advertising, public relations, marketing, digital and other promotional activities to build reputation and relationships, create a cohesive brand, enhance consumer engagement and drive brand success.

Dimensions of IMC are consistency, integration, synergy, customer focus, relationship building and measurement/accountability. **Stages of IMC** include foundation analysis (internal business processes; external audience/market/public; competitive landscape, etc.), integrating message strategy and media strategy, content creation that aligns with strategies, and flawless execution.

IMC developed in the 1990s and it revolutionized marketing, advertising and PR practice. Lauterborn's 1990 *Ad Age* article declaring that the Four Ps of marketing should be replaced by the Four Cs of IMC — e.g., Product becomes CUSTOMER wants and needs; Place becomes CONVENIENCE to buy; Promotion becomes COMMUNICATION, as in two-way conversation; and Price becomes COST to satisfy those needs — is an example of the then revolutionary, customer-centric concepts inherent to IMC.

IMC aligns with RPIE, the four-step process of public relations. IMC demonstrates that the lessons from the American Revolution that mid-20th century PR historian Scott Cutlip revealed as effective, still hold today — i.e., the importance of organization, symbolism, slogans, staged events, strategic timing and comprehensive campaigns using all available channels.

Table of Some Commonly Used Theories and Models

Douglas F. Cannon, Ph.D., APR+M, Fellow PRSA, prepared the tables below of theories commonly used in public relations organized by type. Sharee L. Broussard, Ph.D., APR, updated it. Many of these theories have accompanying models. Some early theories have fallen out of favor as we learn/know more (via scientific method). For example, the "Magic Bullet (Hypodermic Needle)" theory from the 1920s posited that media messages are directly and uniformly accepted by audiences, but now we know that media messages are cumulative and selectively perceived/processed.

In *The Bookshelf* texts, trends are to not have separate "theory" chapters or sections (sneaky, sneaky), but rather to embed theories, models and principles of practice throughout. The table below is a brief summary of commonly used theories and models drawn from these texts, other theory and public relations case studies texts, academic publications, lecture notes, etc. There's a reference list for the table below it.

Important points about this table:

1. This is **not an exhaustive list** of theories and models used in public relations (which can come from any discipline).
2. The descriptions are **attempts to briefly summarize** into bite-sized chunks what can be detailed information that, in many cases, takes a lifetime or more to perfect.
3. These descriptions are **not complete explanations** of any of these theories and models.
4. Examples provided are attempts to show these at work; **better examples may exist or evolve**.

Remember that the Examination for the Certificate in Principles of Public Relations is about APPLICATION. It won't be like a college exam where you might see matching, true/false or essay questions. Practitioners should be able to apply the principles of practice and many of these theories and models are the foundation of many best practices in the field of public relations. As you go through this table, see if you can think of other examples of each of these in action.

TYPE	THEORY	DESCRIPTION/PURPOSE	PR EXAMPLE
Change	**Diffusion of Innovations** (Models for this theory often show the personality types within a skewed curve or a complex model of antecedents, process and consequences by source type.)	Everett Rogers' theory describes how people adopt new products or ideas. People may find out about new things via mass media, but most will trust other people they know before trying something new. Time influences adoption. Personality traits influence how people approach new things. The theory proposes five personality categories: innovators, early adopters, early majority, late majority and laggards. Five factors influence how soon people adopt a new idea: relative advantage, compatibility, complexity, trainability and observability.	Internet use growth over time. According to Pew Research, in June 1995, only 14% of Americans used the internet. By spring of 2021, 93% of Americans use the internet daily and 31% are "almost constantly" online.
Business Ethics; Corporate Social Responsibility; PR (Strategic Communication)	**Carroll's Pyramid of Corporate Social Responsibility** (Model)	Four levels of CSR, progress from economic responsibilities (profit) to legal responsibilities (compliance), ethical responsibilities (doing what's right), and finally, philanthropic responsibilities (contributing to society). Archie Carroll (1991).	Promoting an organization's efforts like supporting education programs, building houses, water purification, etc., showcases the philanthropy level. Ex. Tom's Shoes
Business Ethics; Corporate Social Responsibility; PR (Strategic Communication)	**Stakeholder Theory**	Success is not just measured by financial profits but also by the satisfaction of its stakeholders including customers, employees, suppliers and communities. It emphasizes managing relationships with all stakeholders and proposes six principles: entry/exit, governance, contract costs, agency and limited immortality. Edward Freeman (1984)	An organization's sponsoring events, supporting local charities and involving employees in volunteer activities; emphasizing community relationships and its commitment to all stakeholders. Ex. Johnson & Johnson's Caring for the Community initiative
Business Ethics; Corporate Social Responsibility; PR (Strategic Communication)	**Triple Bottom Line**	An organization's performance should be judged by evaluating a company's performance based on three dimensions: economic (profit), environmental (planet) and social (people). It emphasizes a holistic approach to sustainability. John Elkington (1994)	Promoting an organization's sustainability initiatives, like reducing carbon emissions or using eco-friendly packaging, highlights the environmental dimension of TBL by communicating a commitment to environmental responsibility. Ex. Patagonia
Information Processing	**McGuire's Information Processing Model** (This model shows a series of steps audience members go through when processing persuasive messages.)	A 12-step model that shows how people take in and process information. McGuire's Information Processing Model is a framework that describes how individuals respond to persuasive messages by progressing through stages such as exposure, attention, perception, yielding, retention and behavior change.	This explains the steps humans go through from noticing something to recall and action. From a fast fashion organization catching your attention to your taking action follows a process.

Learning; Psychology; Mediated/Mass Communication	**Social Cognitive Theory** (grew from Social Learning Theory)	Bandura's Social Cognitive Theory (1986) explains that people learn from observing others; their beliefs, thoughts and behaviors are influenced by social factors. Human behavior is shaped by self-regulation, self-efficacy and cognitive processes. In PR, this concept is crucial when crafting messages or campaigns to encourage certain behaviors or actions. Bandura's Social Learning Theory is an earlier version. People adopt opinions and behaviors they see modeled and rewarded. Various types of learning: observation, imitation, reinforcement, self-efficacy, attention/retention, reproduction.	SCT: If you're trying to promote healthy eating habits, focus on self-efficacy by providing success stories of individuals who changed their diets by making good choices. Showcase real-world examples of people who've reduced their carbon footprint to inspire others to take similar actions based on the principle of observational learning. SLT experiments showed that when children watched adults treat dolls violently, those children replicated the violent behavior.
Mass Communication	**Agenda setting**	Media messages can have a direct cognitive effect but not necessarily a behavioral effect. Repeated news reports about an issue can make it important to readers (transfer of issue salience from media agenda to public agenda). Maxwell McCombs and Donald Shaw first demonstrated agenda-setting during the 1968 presidential election (1972 publication).	I know reducing unemployment is important. I've been seeing things in the news about it for weeks.
Mass Communication	**Cultivation**	Mass media (particularly television) shapes (cultivates) people's view of social reality. Secondhand experience through media content can distort what people think of the world. George Gerbner, who began this line of thinking, found that people who watched lots of TV tended to be fearful of the world, suspicious of others and susceptible to social paranoia or conspiracy theories ("mean or scary world effect").	I won't go downtown after 6 p.m. I don't want to get mugged. I know from watching the TV news each evening that crime is rampant downtown at night.
Meaning	**Coordinated Management of Meaning**	Our social worlds are constructed by our language. Whether people interpret communication events positively or negatively is based on their own lived experiences and understanding. Pearce & Cronen (1980).	The simple question "Does this make me look fat?," is interpreted very differently by the wife who asks and the husband knows there's no winning answer. Some languages have words for things others don't and vice versa. Think about how in languages that use masculine and feminine nouns, whether something is described as "strong" or "beautiful" depends on its gender in language.

Meaning	**Symbolic Interactionism**	"Self" is a central concept for this theory that posits people understand their world through the use of symbols and interaction with others. Signs and symbols only make sense in the context of culture: symbols and shared meanings, interpretation, feedback, construction of reality, etc.	Think of all the words used and symbols inherent to ceremonies like weddings: attire, exchange of vows, wedding ring, etc.
Mediated Communication	**Channel Expansion**	A person's experience with a medium influences his/her perception of its richness. People and organizations use technology to broaden their communication channels and capabilities, enhancing their ability to connect with others across different platforms.	Using the "media mix" — e.g., social media, email newsletters, traditional media, etc., to engage with various stakeholders (customers, employees, investors) effectively, utilizing technology to expand and diversify their communication efforts.
Mediated Communication	**Participatory Culture**	Advancements in digital technology, such as the internet and social media, changed how people engage with media and culture. More people create content due to low barriers to entry, and emphasis on creativity, collaboration and sharing.	Fandom; fan communities; "citizen journalism"
Mediated Communication	**Spiral of Silence** (The model for this theory often shows a downward spiral indicating fewer and fewer people will share opinions.)	Elisabeth Nolle-Neumann (1974) said people constantly monitor the opinion climate around them. They perceive the majority viewpoint. Those who disagree keep silent. They are afraid of social isolation if they buck the majority view. This theory helps illustrate the "bandwagon effect."	I know people don't agree with me. Therefore, I'm keeping my opinions to myself.
Mediated Communication	**Uses and Gratifications**	People seek out communication media to satisfy specific needs — e.g., information gathering, entertainment, social interaction, self-expression, escapism, identity formation — rather than passively consume whatever is available.	Someone might watch a news program to stay informed (information gratification), while another may use social media to connect with friends (social gratification).
Mediated/Mass Communication	**Media Ecology Theory**	Marshall McLuhan (1964) called attention to "the medium is the message." Changes in media technology, from television to the internet, can reshape the way people interact with information, their sense of community and their understanding of the world. Humans have shifted from passive media consumption to active media engagement.	Don't just consider or focus on the content of media, consider the medium and its implications to society.
Mediated/Mass Communication	**Media Richness Theory**	The choice of communication medium should match the complexity of the message, with richer media like face-to-face meetings being more suitable for complex discussions and leaner channels, like texts or emails, being better for simple, straightforward information.	For a crisis centered on a complex legal issue, a face-to-face meeting or video conference would allow a richer exchange of information than a letter or email.

Persuasion	**Cognitive dual processing** (Models for this theoretical concept are generally process models showing two routes to persuasion + various other components like involvement and motivation.)	People use different strategies for processing messages or making decisions. These strategies are based on how important the topic is (motivation), or the individual's cognitive capacity (time to think about the topic, knowledge of the topic or general intelligence). People generally try to use as little cognitive energy as possible to make decisions. Three models illustrate cognitive dual processing: The Elaboration Likelihood Model of Persuasion (1979), The Heuristic-Systematic Model of Cognitive Processing (1980), and Motivation Determines Processing (MODE Model, 1990). Each model presents two paths or roots to decision-making.	"The president said it, and I believe it because I trust him," is an example of peripheral (ELM), heuristic (HSM) or spontaneous (MODE) processing. The speaker uses minimal cognitive energy. He/she makes a decision based on the information source (a cue or rule of thumb) and not on message content. "I really need to consider all the options," is an example of central (ELM), systematic (HSM) or deliberate (MODE) processing. The speaker intends to use cognitive energy to weigh the merits of the information.
Persuasion	**Hierarchy of Effects**	A series of stages individuals may go through when exposed to persuasive messages: awareness, knowledge, liking, preference, conviction and action (sometimes referred to as AIDA attention-interest-desire-action)	Digital campaign to raise awareness about a new recycling initiative: graphics to gain attention, photos to tell the story of how easy it is for families to recycle, text to provide "how to" information, hashtag for posting pics of families recycling
Persuasion	**Narrative Paradigm**	Walter Fisher (1984) described how humans use storytelling to make sense of our world. ""Good reasons" define actions or decisions and these are personal and determined by culture, character and history.	Stories help us learn and change — e.g., parables in the Bible. The stories communicators shape can help define how the message is understood.
Persuasion	**Rhetoric (The Rhetorical Triangle)**	Rhetoric represents a category of communication concepts that trace their roots to Aristotle. Rhetorical elements are ethos, logos and pathos. The rhetorical approach uses information about the communicator, the logic of the message and the emotional appeal of the message to describe and predict how effective a message will be. Organizations use language/messages to build consensus (organizations and the publics co-create meaning). The process may involve advocacy and counter-advocacy. People are adjusted to ideas, and ideas are adjusted to people.	Think about information dissemination during the COVID-19 pandemic: Logos (logic): vaccine efficacy; public health benefits of vaccines and social distancing; government declarations (stay-at-home requirement). Ethos (credibility): credible sources like CDC, WHO, medical experts and community leaders. Pathos (emotion): personal stories of people lost, families impacted, human impact, visuals of exhausted health care workers.

Persuasion	**Sleeper Effect**	In propaganda research, Carl Hovland found a decreased tendency over time to reject the material presented by an untrustworthy source (Hovland & Weiss, 1951). People may initially reject a message because the source isn't credible. But after about six weeks, people may forget the source but remember — and begin to believe — the message.	I won't go to that coffee shop anymore. I read somewhere that the pumpkin spice latte contains dangerous toxins.
PR (Strategic Communication)	**Agenda building**	Often described as a subset of agenda-setting theory, agenda building describes how organizations can use "information subsidies" to news outlets to influence the media agenda. (Information subsidies include news releases, blog posts and interview opportunities with policymakers or advocates.) The thinking behind agenda-building theory is that news coverage doesn't just reflect reality. News coverage is a manufactured product that can be influenced. By working to boost media attention to a topic, organizations get more public attention for their issues. Increased news coverage can make those topics important to people in key publics (transfer of issue salience from media agenda to public agenda).	A business might coordinate the use of news releases, blog posts, tweets, special events and interviews to build — and then sustain — media interest in a new product. News releases and story pitches could be timed weeks before the product launch to draw attention to the story and highlight intriguing features of the planned item. The launch event and follow-up interviews with company representatives could bring more attention to the product. Continuing attention to reactions by customers and analysts could keep the story on the media agenda.
PR (Strategic Communication)	**Competence**	A PR practitioner's knowledge and skills determine his/her role in an organization. Perception of competence depends on work context and the measurement method management uses. Competent practitioners balance concerns for what's effective with what's appropriate. They base judgments on social impressions of how actions and messages work to reach strategic goals.	As a technician, I'm concerned most with output, message content and framing. As a manager, I'm concerned with outcomes and relational results (goodwill).
PR (Strategic Communication)	**Contingency Theory of Accommodations** (A typical model for this theory is a continuum.)	The "it depends" theory says the appropriate communication strategy (accommodation to advocacy) is dependent on the situation (cooperation to conflict). Practitioners assess the context, audience and social/cultural factors and determine the best strategy depending on the circumstances.	An organization may take an encouraging or empathetic tone or it may take an assertive stance in response to the situation at hand.

PR (Strategic Communication)	**Excellence**	James Grunig, Larissa Grunig and David Dozier first published this general theory of public relations in 1992. The theory "specifies how public relations makes organizations more effective, how it is organized and managed when it contributes most to organizational effectiveness, the conditions in organizations and their environments that make organizations more effective, and how the monetary value of public relations can be determined." Excellence theory shaped lots of thinking about public relations in the late 20th century. The theory includes the four classic models of public relations: press agentry/publicity, public information, two-way asymmetrical and two-way symmetrical.	If an organization makes public relations a distinct senior-management function, lets the PR executive fill both management and administrative roles, considers public relations outcomes in policymaking, fosters an open corporate culture, generally practices two-way symmetrical communication, and engages activist publics, the organization meets standards of "excellence."
PR (Strategic Communication)	**Inoculation**	William McGuire found that people are more likely to resist persuasive messages if they've been exposed to counterarguments in advance. People are less likely to change opinions they have already formed and tested.	Our first ad shows that our candidate is an upstanding family man who has been active in the local community. We don't want our opponent to paint him as a "Washington insider."
PR (Strategic Communication)	**Organizational theory of public relations**	Organizations are more likely to give information than to seek information. Information flow is generally one way (James Grunig, 1976).	The Colombian agricultural agency had trouble informing farmers. The agency was more likely to give information than to seek information. The agency was unlikely to listen to or engage in dialogue with its publics (Grunig, 1976, 2006).
PR (Strategic Communication)	**Relationship management (Organization-Public Relationship)**	Mary Ann Ferguson (1984) asserted that relationships between organizations and their key publics should be the focus of PR research. John Ledingham and Stephen Bruning's (1998) relational perspective positions PR as a "management function that uses communication strategically" (p .56). The theory advocates long-standing engagement between organizations and publics with indicators of control mutuality, trust, satisfaction, commitment, exchange relationship and communal relationship measures used to evaluate relational dynamics. Linda Childers Hon and James Grunig (1999) wrote a seminal paper on the measurement of what is frequently referred to as Organization-Public Relationship.	Major banking institutions aim to score favorably on the six theoretical dimensions to ensure customers continue to bank with the institution and are satisfied with the relationship.

PR (Strategic Communication)	**Situational Crisis Communication Theory** (Models for this show processes and decision trees.)	Developed by Timothy Coombs, it posits that organizational activities (pre-crisis, response and post-crisis) impact the severity of the crisis. Organizations tailor their crisis communication responses based on the perceived level of crisis responsibility; organizations adjust their messages and repair strategies to the situation.	In the case of a cyberattack, the organization itself is not responsible, so its messaging may indicate that it was a victim, but their security measures in advance have made it manageable; they assure customers they are working diligently to rectify the situation and keep their data secure.
PR (Strategic Communication)	**Situational Theory of Publics**	Context influences relationships (James Grunig, 1966). Publics are active or passive. People are more or less engaged with an issue based on their perception of its relevance to them. ACTIVE PUBLICS organize and take action; AWARE PUBLICS recognize a problem; LATENT PUBLICS may not have recognized a problem but it may affect them; NONPUBLIC, no impact. Three elements are involved in this process: (1) Problem recognition (awareness, interest), (2) Constraint recognition (what's required or what motivates a person to act), (3) Level of involvement (importance). Some publics are active on several issues; others are active on only one.	Elected church decision-makers are more likely to seek information about church issues from church newspapers than are rank-and-file church members (Cannon, 2007). Traffic woes -- ACTIVE: Residents who live in an area with high traffic congestion are concerned about it and will actively seek information on and try various solutions or may even petition for change; AWARE: perceive traffic issues but do not seek alternate solutions; LATENT: residents in less congested areas are unconcerned with finding solutions.
PR (Strategic Communication)	**Social Media Engagement**	People engage with content on social media through active participation, which can lead to a sense of connectedness or community and lead to social influence. It considers various dimensions of engagement, how information flows and contextual factors like the purpose of the engagement.	When influencers use questions, gamification, etc., they're trying to increase participation and engagement. Personalization and interaction, particularly with others who can amplify the message, increase connectedness.
Psychology	**Attribution theory** (Process models of various shapes illustrate this theory.)	To understand or explain circumstances, events or phenomena, communicators assign (attribute) cause(s) to events. Internal attribution (personal factors), external attribution (situational factors) and attribution error (wrongly assigning cause) are important considerations in attribution theory.	If a student fails a test, they may attribute this to internal factors (lack of intelligence) or external factors (poorly designed test) — the choice of attribution can significantly affect motivation, emotional response and subsequent behavior (studying harder; feeling discouraged).

Psychology	**Cognitive Consistency theories** (Balance, Symmetry Theory of Interpersonal Action, Congruity, Cognitive Dissonance)	Inconsistencies between attitudes and actions drive (motivate) people to change what they think/believe. The goal is to achieve consistency between expressed opinions and actions. Major theorists: Heider, Newcomb, Osgood, Festinger	I've never liked people from that group. After working with some of them, however, I now don't think they are so bad. I'm healthy, I'll keep vaping despite knowing the health risks involved with vaping.
Psychology	**Identification**	Identification theory examines how communication helps people seek to identify with individuals, groups or causes. The goal of identification is to overcome separateness. People are more likely to adopt the beliefs, behaviors, etc., of someone with whom they identify. Identification occurs when individuals are made aware of the common ground they share with others.	To encourage more Hispanic voters to identify with Republicans, the party created ads in Spanish with Latino characters. Someone who's a size 12 may follow and replicate the fashion choices of influencers or celebrities who wear sizes larger than 0 or 2.
Psychology	**Selective Processing theories** (Perception, Attention, Exposure)	Selective processing theories describe how people filter information based on their own interests, needs, biases, etc. Selective Perception (interpret/remember information that aligns with existing beliefs, attitudes and values); Selective Attention (filter out some stimuli and filter out others based on relevance, novelty, personal interests, etc.); Selective Exposure (seek out information that aligns with existing beliefs and values and avoid info that contradicts these).	In a political campaign, messages are aimed at specific demographics whose beliefs align with the candidate's platform; strong attention-getting visuals, language and stories are used to grab attention and key messages are repeated frequently.
Psychology	**Social exchange**	Perceived costs and rewards (effort) of an action predict group behavior.	A person may continue to work in a job with a difficult boss because the salary and benefits outweigh the stress and dissatisfaction.
Psychology	**Social Judgment**	People accept or reject persuasive messages to the extent that message content corresponds to each individual's attitudes and beliefs, and influences his or her self-concept. Three latitudes of social judgment: acceptance, rejection or noncommitment. Carl Hovland helped develop this theory (Sherif & Hovland, 1961).	A person with strong environmental beliefs may accept messages advocating for recycling and conservation efforts and will be less accepting of messages favoring increased industrial development.
Psychology	**Third-person effect**	When a person lacks information about other people's opinions, he/she thinks others will think and behave as he/she would. W. Phillips Davison (1982) said people expect mass media messages to affect others (them: third person) more than themselves (us: first person). That belief may lead the first persons to act in mistaken anticipation of the media effect.	Comments and reviews online about our product are ridiculous. Any thinking person can see these statements are baseless. Nevertheless, we better reduce the price to prevent a drop in sales.

(Strategic Communication)	**Theory of Planned Behavior (Theory of Reasoned Action)** (Models for these show antecedents, process and results.)	A person's attitude toward a behavior consists of (1) a belief that that particular behavior leads to a certain outcome, and (2) an evaluation of the outcome of that behavior. If the outcome seems beneficial to the individual, he or she may intend to participate in a particular behavior. Included in a person's attitude toward a behavior is his/her concept of the subjective norm. Central concepts include attitude, intent and behavior. Knowing people's attitudes and intents helps predict their behaviors. TRA was developed by Fishbein & Aizen; TPB is Aizen's revision of the original work.	You know when you're trying to make a decision and draw a line on a sheet of paper to work out the pros/cons for the decision; that behavior is this theory in action. John knew his friends usually followed his example. Habitat for Humanity needed volunteers to build a house. John thought Habitat did good work. If he volunteered, his friends would likely join him, and Habitat would have several volunteers. If he didn't volunteer, his friends probably wouldn't volunteer either. Because John wanted to advance Habitat's mission, he volunteered and expected his friends to volunteer as well.
Transmission - Media Effects	**Framing**	As a media-effects theory, framing involves the transfer of attributes (or frames) describing a person, issue or topic from media to audience. News stories, for example, describe a political candidate in a certain way. News consumers begin to use those attributes to describe the candidate. As a message-focused theory, framing describes how content elements (frames) prompt audience members to recall certain already established, shared and persistent stereotypes, metaphors or social qualities. These predispositions shape how audience members interpret messages and respond to narratives and events.	I trust the governor. Everything I've read about him makes me think he's an honest, straight-talking politician (attributes). He has middle-class values and is concerned about people like me (more attributes). The committee report said that researchers "had made great strides" and that the project was "moving forward." Progress is associated with walking forward.
Transmission - Media Effects	**Priming**	Mass media can introduce and provide context, which people can later recall. The media primes the audience for what X looks like.	Years before the first president/vice president who were non-white males, it became commonplace in TV shows and movies to see minorities and females in these two roles.
Transmission - Media Effects	**Two-step Flow** (Models for this theory show a message aimed at an opinion leader, which is then magnified to people within his/her sphere of influence.)	Media messages indirectly affect human behavior. "Opinion leaders" mediate message effects. Everyone in the audience can receive the message, but opinion leaders influence how individuals understand and respond to messages. Paul Lazarsfeld first hypothesized a two-step flow in 1944 after studying the 1940 presidential election. Elihu Katz and Lazarsfeld refined the theory in 1955 (*Personal Influence*).	Influencers + their followers illustrate this theory. I've seen lots of information online about hybrid cars, and my dad has been encouraging me to buy one. He knows a lot about cars.

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KEYS TO THEORIES and MODELS

- Understanding and using theories and models helps practitioners be more effective because they're tried-and-true roadmaps.
- Consider ethics when applying theories to public relations practice; remember that public relations is *responsible* advocacy.
- Theories and models aren't static; they evolve.
- Context is important, both in meeting the unique needs of your client or organization and within the ever-changing political, economic, social, technical, legal, and environmental landscape.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- See theory in action.
- Identifying communication barriers.
- Communicating with cultural competence.
- Diffusion of innovations in action.

Crisis Communication (5%)

Examination KSAs

Crisis communication questions account for 5% of the Examination for the Certificate in Principles of Public Relations questions. The specific KSA for this topic is:

- Identifies roles and responsibilities of public relations practitioners at the pre-crisis, crisis and post-crisis phases of a situation.
- Acts and communicates appropriately during each of these phases.

Anticipating a crisis is part of every public relations practitioner'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 members, management representatives, and outside public relations counsel. This plan should align with your organization's operations crisis plan.

Crisis Communication Frameworks

The Bookshelf texts offer rich crisis communication information as well as planning templates, so review your selected text's section on crisis communication. They also cover the concept of **Issues Management** – monitoring, identifying risks, prioritizing, developing a response and/or taking action to solve the issue — which may help organizations prevent issues from becoming crises.

What's common among any crisis communication framework or template is that an organization should **be prepared**, it should **execute well, be honest**, and it should **use the event to learn and improve**.

Studying cases helps practitioners learn from others and be prepared, because it's not **IF** an organization will face a crisis, it's **WHEN** — from cyberattacks or mass casualty incidents to natural disasters, fraud or any other unexpected event that puts the organization and its operations at risk. The two Tylenol murder incidents of the 1980s continue to be studied today as examples of effective crisis management and communication response. NASA's 1987 Challenger and 2003 Columbia responses are also studied as examples of how an organization learned from one incident to be prepared for a subsequent one. Entire classes and textbooks are dedicated to case studies, many related to crises.

Situational Crisis Communication Theory

SCCT provides a framework for managing and responding to crises effectively. Crises can occur online or in the physical world. Stakeholder identification is important because different publics may need differentiated communications about the same crisis event — e.g., internal communication will be different from public communication, which will be different from regulatory agency communication. Attribution theory is central to SCCT because it helps explain how stakeholders assign responsibility or blame during a crisis: internal/external, temporary/chronic, controllable/uncontrollable; these influence public perception and require tailored communication responses. If a crisis was preventable, it's judged more harshly than if the organization is a victim or if the crisis is an accident. Timothy Coombs first published on Situational Crisis Communication Theory in 1995. Key points:

- **Crisis Stages:** *Pre-crisis* (prevention and preparedness), *crisis response* (quick and accurate information dissemination is important), and *post-crisis* (business restoration; organizational learning). Each stage requires a different communication strategy.
- **Crisis Types:** Understanding the nature of the crisis (victim, accidental or preventable) is imperative for establishing an appropriate response. People are more tolerant of minimal or low crisis responsibility and less forgiving of preventable crises.
- **Importance of the initial response:** Public safety should be the primary concern in any crisis. Use all available channels to communicate. The response should be quick, accurate and communication should be consistent.
- **Reputation Repair Strategies:** Organizations' image repair strategies are dependent on the situation and may include *attack the accuser; denial; scapegoat; excuse*/inability to control — provocation (someone else's fault), defeasibility (lack of information), accidental (lack of control); good intentions (the organization meant to do well); *justification* (minimize damage); *reminder* (of past good work of organization); *ingratiation* (praises stakeholders); *compensation;* and *apology*.
- **Ethical Considerations:** Upholding ethical standards helps maintain trust and credibility with stakeholders.

Social Media Crisis Communication

Newer texts on *The Bookshelf* include crisis communication in online situations more than older texts, simply because this is a moving target. Foundational information and best practices for crisis communication typically apply to online situations, with one notable exception — control of information. Additionally, misinformation and disinformation can be rampant online. See for example the Institute for PR's work on disinformation worldwide: https://instituteforpr.org/2022-disinformation-report/.

Kelleher's (2021) section on social media crisis communication describes Jin, Liu, Fraustino, et. al.'s Social Media Crisis Communication Model (SMCC) in "Public Relations 2nd edition," pp. 340–344: practitioners need to pay attention to influential social media creators, social media followers, and social media inactives. Their interaction and the word-of-mouth spread of information may determine the crisis impact. The organization itself can act as a creator and work to communicate accurate/truthful information directly. An organization's quick action online often mitigates social media crises.

Bigger picture

Crisis communication response occurs within the larger organizational response. *The Bookshelf* texts talk about this briefly. It's good to know that the **Federal Emergency Management Agency**'s www.ready.gov has a lot of emergency preparation information available, including www.ready.gov/business/emergency-plans/crisis-communications-plans. On a deeper level, the ICS (Incident Command Systems) and NIMS (National Incident Management Systems) standards provide detailed planning frameworks that apply to all emergencies; these include detailed information about communication planning and response. Many organizations develop their organizational emergency response plan according to these standards. Some organizations or governmental entities post their emergency/crisis plans online (i.e., Nashville). Many can be found with a simple internet search.

FEMA also has guides/toolkits for communicators, like this one on flood risk: www.fema.gov/sites/default/files/documents/fema_cx-toolkit-communications-plan-guide.pdf.

Basics of Crisis Communication (pre – during – post)

The following is adapted from a presentation by Doug Newsom, Ph.D., APR, Fellow PRSA, and Jim Haynes, APR, Fellow PRSA:

Pre-crisis: The Team

- Assign specific roles to team members such as designating one person to speak to the external publics and another to keep the internal publics fully informed.
- Rehearse the crisis management team regularly.
- Train and retrain spokespeople and emphasize 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 consistent voice.

Pre-crisis: 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 (what's possible).
- Prioritize your organization's vulnerabilities by identifying those that would be most urgent or most probable.
- Pay particular attention to the worst cases.
- Realistically evaluate the probability that the worst case will happen.
- Review current policies and strategies that might be affected.
- Review key messages you will want to impart in response to possible scenarios.
- Draft Q&A documents for responses to these possible crisis scenarios.

Seitel (2020) says that being prepared is the key to effective crisis management, and he provides four paramount issues to consider in crisis planning.

1. Define the risk for each potentially impacted audience or public.
2. Describe the actions that will mitigate each risk defined.
3. Identify the cause of the risk.
4. Demonstrate responsible management action.

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

Crisis management expert Jim Lukaszewski, ABC, APR, Fellow PRSA, suggests the following planning steps ("Effective Public Relations 11th," p. 282).

- Identify what can go wrong and become highly visible.
- Assign priorities based on which vulnerabilities are most urgent.
- Draft questions, answers, and resolutions for potential scenarios.
- Focus on what to do and say during the first critical hours of a crisis.
- Develop a strategy to contain and counteract, not react and respond.

Pre-crisis: Keep Plans Current

- Review the entire plan at least annually; a quarterly review is better. Practice implementing the plan through role-playing and mock events.
- 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.

During: 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 — and especially the first hour — after a crisis.
- Define the crisis in terms of a triggering event — the cause.
- Craft a timely statement that is accurate yet flexible enough to be refined as details about the crisis emerge.
- Identify priority publics. These may change with the type of crisis while others will remain constant such as employees, customers, shareholders, suppliers, neighbors, the larger community, news organizations, regulatory agencies and government officials.
- 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 spokespeople should officially speak for the company as incident details become available.
- Inform employees and your internal audience first.
- Demonstrate concern for those affected by the crisis and communicate what the organization is doing or planning to do to solve the problem.
- 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 during the most intense hours or days of the crisis.
- The crisis message needs to be posted on the organization's website and social network platforms. This message should include a basic statement about the incident, how the organization is responding, and supporting facts as they become known. Organizations often set up "dark" websites for crisis communication and activate them when an incident occurs.

During: As the Crisis Unfolds

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

Major mistakes made by public relations practitioners and other leaders during crises include waiting too long to respond, hiding from various audiences, attacking the 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 the affected publics ("Effective Public Relations 11th," p. 308).

Post-crisis: 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.
- Update the crisis management/communication plan in light of this most recent experience.

Be careful about ...

What's revealed

Organizations need to be careful about what's said publicly. Saying too much can sometimes jeopardize the organization and/or its operations. For example, during a cyberattack, the perpetrators and subsequent predators watch the news, social media and any information the organization releases to gain more information; revealing vulnerabilities can be damaging.

Though apologies are common when celebrities or public figures upset the public, they're not as common from organizations. A full apology can be interpreted as an admission of culpability. Organizations say or do things to "make it right" more often than overtly apologize.

Stealing Thunder

This appears in some of *The Bookshelf* texts and in research articles. It involves an organization's voluntarily disclosing information about a potential crisis or problem before others expose it. Proponents say this strategic approach allows the organization to control the narrative and it's purported to help build credibility and trust. It is extremely uncommon.

CRISIS COMMUNICATION Additional Resources (beyond The Bookshelf)

Austin, L. & Jin, Y. (eds) (2018). *Social media and crisis communication*. New York, Routeledge.

Bruner, B.R. & Hickerson, C.A. (2018). *Cases in public relations: Translating ethics into action.* New York, Oxford University Press.

Centers for Disease Control and Prevention (2023). CDC strategy for global response COVID-19 2020-2023. Retrieved Sept. 20, 2023, from www.cdc.gov/coronavirus/2019-ncov/global-covid-19/global-response-strategy.html.

Centers for Disease Control and Prevention (2018) *Crisis and emergency risk communication manual.* Retrieved Sept. 20, 2023, from https://emergency.cdc.gov/cerc/manual/index.asp.

Institute for PR (2014). *Crisis management and communications (updated September 2014).* Retrieved Oct. 1, 2023, from https://instituteforpr.org/crisis-management-communications/.

Lukaszewsi, J.E. (2023). *Blogs.* Retrieved Sept. 15, 2023, from www.e911.com/.

Lukaszewsi, J.E. (2016). *Seven dimensions of crisis communication management: A strategic analysis and planning model.* Retrieved Sept. 15, 2023, from https://e911.com/wp-content/uploads/2020/10/seven_dimensions_of_crisis_management-c-2016.pdf.

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

Swan, P. (2019). *Cases in public relations management: The rise of social media and activism, 3rd ed.* New York, Routeledge.

KEYS TO CRISIS COMMUNICATION

- It's best not to have crises. Issues management (assessing and addressing vulnerabilities, etc.) can serve a valuable preventive function.
- Put people first. It's important to express concern, empathy and compassion, but public safety is the top priority. When applicable, organizations should give people the information they need to protect themselves.
- Act quickly, be correct and be honest — timeliness, transparency and accuracy are crucial to effective crisis communication.
- Clear, consistent and centralized messaging helps ensure the organization speaks with one voice.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- SCCT in action.
- What would you include?
- Case study depth analysis.

Concepts and Current Issues in PR (5%)

Examination KSAs

Questions related to Concepts and Current Issues in Public Relations account for 5% of questions on the Certificate Examination. The specific KSA for this topic is:

- Defines public relations and differentiates it from related concepts (e.g. publicity, advertising, marketing, press agentry, public affairs, lobbying, investor relations, social networking, and branding).
- Identifies key figures who influenced the field and major trends in the development of public relations as it is practiced today.
- Identifies out-moded perceptions of the public relations profession.

Some Concepts & Current Issues in PR

The idea that PR is strictly media relations is as outdated as boxes of newspaper clippings to demonstrate a practitioner's effectiveness. Gini Dietrich's PESO Model™ is a more complete picture of the field today, along with the metrics and analytics that allow for **data-driven decision-making** and can connect the dots between practitioners' actions and organizational results.

You'll find the various terms listed in this KSA in the Key Definition section of this "Study Guide." As noted throughout this study guide, PR, marketing and advertising are similar and come together in Integrated Marketing Communication, but they are not the same function. PR can and does exist in sales contexts; it can and does exist strictly in the realm of publicity or of media relations, but it's more. *PR is the management function that attempts to establish and maintain mutually beneficial relationships between an organization and the various publics upon whom its success or failure depends* — sometimes that means giving people the information they need to access services, to protect themselves, or to stay safe.

"*With great power comes great responsibility*" is a famous quote popularized by Marvel's Spiderman, but it's been said through the centuries by leaders, philosophers and writers of religious texts because it's true. **Professional communicators help shape culture and society**. How we communicate with others; how we incorporate diversity, equity, inclusion, access and belonging (DEIAB) into the workplace and the work we produce; how we live the Code of Ethics — all make a difference, not only to our organizations, but to the world writ large.

We're residents of the planet

The U.S. does not exist in a vacuum. **Globalization** refers to the interconnectedness and interdependence of nations that impacts economies and finance, technology, labor, politics, cultures and the environment.

Researchers in Germany annually uncover the five most important trends at the intersection of management, society and technology in context of how they impact professional communicators' work. The Academic Society for Management and Communications – An initiative of the Günter Thiele Foundation, publishes an annual "Communication Trends Radar" report (available at www.akademische-gesellschaft.com/publications/?lang=en).

"Communication Trends Radar"-identified trends impacting professional communicators include:

- 2024: **Information inflation** (handling the declining value of information).
- 2024: **AI Literacy** (competencies to improve task accomplishment with artificial intelligence).
- 2024: **Workforce shift** (preparing for labor supply transformation).
- 2024: **Content integrity** (dealing with fabricated content).
- 2024: **Decoding humans** (harnessing physiological and behavioral data).
- 2023: **State revival** (interacting with governments for business)
- 2023: **Scarcity management** (dealing with/communicating about availability, logistics and other bottlenecks)
- 2023: **Unimagination** (managing the unimaginable/responding to the inconceivable)
- 2023: **Augmented workflows** (human and AI collaboration)
- 2023: **Parallel worlds** (managing the diversification of reality: virtual, augmented)
- 2022: **Language awareness** (value/embrace diversity of language)
- 2022: **Closed communication** (closed vs. open communication; less communication flow)
- 2022: **Gigification** (outsourcing communication tasks for productivity)
- 2022: **Synthetic media** (new era of content generation and public communication)
- 2022: **Cybersecurity** (raising awareness, countering attacks, safeguarding communication)
- 2021: **Denialism** (stakeholders denying truths and facts)
- 2021: **Virtual communication** (new ways to communicate and collaborate virtually)
- 2021: **Sustainable communications** (comms departments ecological footprints)
- 2021: **Digital nudging** (designing digital environments)
- 2021: **Voice interaction** (shifting preferences from text to voice)

The annual "Communication Trends Radar" reports describe each in detail. These trends are derived from research at the intersection of management, society and technology and they certainly represent a **broad list of "current issues"** in public relations worldwide. Many of these are complex issues requiring the attention of practitioners, organizations, sectors, and even nations.

Worldwide, professional communicators are grappling with what **Artificial Intelligence** means to the profession and how to ethically incorporate it into workflow. See PRSA's guide for ethical use of generative AI, "Promise & Pitfalls: The Ethical Use of AI for Public Relations Practitioners Guidance from the PRSA Board of Ethics and Professional Standards," available at www.prsa.org/professional-development/ai-insights.

As digital interconnectivity proliferates, **privacy and security concerns** grow. Cybersecurity is so important, there's a federal agency dedicated to it, the Cybersecurity and Infrastructure Security Administration (www.cisa.gov/). Though IT departments typically manage risks, this should be in emergency plans, and practitioners at all types of organizations should be aware of this for communication purposes and for diligence. What could seem simple decisions about cloud-based vendors could put the organization at risk.

Misinformation (inaccurate or misleading; unintentional), **Disinformation** (intentionally false or misleading; designed to deceive or manipulate), and **Malinformation** (based on fact, but used out of context to mislead, harm or manipulate — e.g., deepfake videos or editing to remove important context to harm or mislead) generated inside and outside the U.S. These cause chaos, confusion, division, as well as reinforce and amplify **polarization** via information dissemination, public discourse and social media. These intersect in echo chambers and filter bubbles where people engage only with information that supports their beliefs and **undermines trust**.

Each year since 2000, the **Edelman Trust Barometer** has tracked trust in key social institutions (government, media, business and non-governmental organizations) worldwide; it's available at www.edelman.com/trust/trust-barometer. They've found that lack of faith in societal institutions is growing; business is seen as most competent and ethical; more than half of respondents worldwide say their countries are more divided than in the past; and that people feel that CEOs are obligated to hold divisive forces accountable. The latter expectation means heightened risk for business. People expect the business sector to do more about social and environmental issues, but businesses risk reputation if they engage on contentious issues or if their actions contradict their words and they're perceived as inauthentic. It's a tightrope for organizations as **environmental and social responsibility** are prioritized.

With increasing digital global reach, the rise of social justice activism, political sensitivity, "cancel culture," expectations of brand authenticity, ethical concerns about honesty and fairness, and similar societal shifts, **reputation management** is more crucial than ever.

You are not your audience.

Communication is understanding and sharing meaning. For that to occur, the burden is on the communicator to encode messages that will not only be attended to but will take as little effort as possible for the receiver to decode with the intended meaning. <u>It is important to meet people where they are with information they can understand.</u>

The digital divide is real. It's hard for most college students to believe, but there are millions of people not on the internet at all, and of those who are, millions are not on social media. There are many reasons for this, and most are related to lack of resources. Some people can't afford these services, others just don't have access to broadband or meaningful cell service because of where they live, still others are too famous or too powerful to be online themselves. Sometimes, old-school methods of communication, like mail, posters or in-person events, are necessary to reach the people you need to reach.

It's important to keep in mind that public libraries now serve the crucial function of being the only online access point for many people with no other means of connection. The digital divide is studied by academics, policymakers and research groups (see for example www.pewresearch.org/topic/internet-technology/technology-policy-issues/digital-divide/) and policies are being enacted as potential solutions. The federal government recognizes the many challenges lack of access to broadband exacerbates, especially because these were magnified during the COVID-19 pandemic. To help shrink the digital divide, federal grants are helping to establish broadband and cell service in rural areas and aid to individuals and families is available through programs like the Federal Communications Commission's Affordable Connectivity Program (www.fcc.gov/connected).

A significant percentage of Americans **struggle with basic skills like literacy, numeracy or digital problem solving**. People are reading less, generally, which makes visuals and audio/video more important. The Program for International Assessment of Adult Competencies (PIAAC) results are posted here: https://nces.ed.gov/surveys/piaac/. The study ranks these three key skills on five levels. Though adults in the U.S. averaged higher in literacy than peer countries, they scored lower in both numeracy and digital problem solving. Nationally, more than **one in five adults have low literacy proficiency** (≤ Level 1). Adults in this range have difficulty using or understanding print materials in English.

As a PR practitioner, you're not communicating to yourself or even as yourself; the **source** is generally the organization. Tone, voice, literacy level, color, images, language, channel of message distribution, etc., must be factored so that you have the best chance of your message reaching (and getting through to) the people you want to reach. Don't expect even highly educated people to put in the effort to read pages and pages of text — executive summaries, highly digestible chunks of information, infographics, etc., are all necessary to help people understand. **Professional communicators need to put in extra effort so their message can be received and understood** by those for whom it's intended.

PR Education

The Commission on Public Relations Education's 50th Anniversary Report, "Navigating Change: Recommendations for Undergraduate Education," was issued in 2023. CPRE conducts surveys of practitioners and educators, and publishes its findings and recommendations about every five years. "Competence, curiosity, confidence and collaboration" matter to employers. CPRE recommends the following for undergraduate education, and the content of texts on *The Bookshelf* may change as a result:

- The future of the public relations workplace: Experiential learning opportunities should enhance exposure to professional behavior, reinforce workplace expectations and support development of soft skills.
- A six-course standard curriculum for majors: principles, research, writing, campaigns/cases, internship and ethics.

- Critical Strategic Thinking. CPRE introduced the DASA model (detecting, analyzing, strategizing, acting) as a way of thinking through PR planning.
- Data insights and strategy: Aligning data analysis and AI through education for practice. Practitioners should understand analytic metrics, data analytics and use of AI.
- Ethics is an essential competency that needs more focus.
- DEI is an ethical social responsibility.
- PR as a driver of social change.

Read the full report or the executive summary here www.commissionpred.org/navigating-change-report/.

PR in History

Gutenberg's printing press as well as the introduction of broadcast and digital media were definitive points in human history, each forever changing the distribution of information. It's important to note that the foundations of public relations found in the American Revolution (Cutlip) and since, like organization, symbolism, slogans, staged events, strategic timing and comprehensive campaigns seem to have existed since the dawn of humankind — even cave paintings highlight exploits and achievements. According to "Public Relations," Kelleher's text on *The Bookshelf*, major motivations for PR throughout history have been recruitment, legitimacy, agitation, advocacy and profit in the key areas of religion, education and politics/government.

Confucius' teachings and philosophy remain relevant in business today. Ancient winemakers would mark their vessels to set their wine apart from others' products. We know about Socrates' teachings because his student, Plato, and his student, Aristotle, spread the word. The ancient Olympic Games were major events involving promotion. We know about ancient military victories because of the storytellers that documented such exploits. Marcus Aurelius' personal writings were distributed by his followers, thereby solidifying an entire branch of philosophy (Stoicism). Some even consider St. Paul's work and his letters sent to grow Christianity to be demonstrations of effective PR. Attention-grabbing actions have literally changed the course of human history, like Martin Luther's nailing his theses to the church door (launching the protestant reformation), the Boston Tea Party (rallying colonists to the cause), the 1963 March on Washington (featuring Martin Luther King, Jr.'s speechmaking broadcast to millions), and many others.

See the "Museum of Public Relations' Timeline": www.prmuseum.org/pr-timeline.

See "Mini-me History – Public Relations from the Dawn of Civilization": https://instituteforpr.org/wp-content/uploads/MiniMe_HistoryOfPR.pdf.

These key time periods are listed as described in "Effective Public Relations 11th" with additional information from *The Bookshelf* texts "Public Relations 2nd edition" and "Public Relations Strategies & Tactics 12th edition." Also included are notable trends and figures during stages.

Seedbed Era (1900 to 1916)

- Organizational Attitudes: Let the public be informed. Muckraking, social reform, unions.
- PR Trends: Defensive publicity. Journalists hired as "interpreters" to get the news out.

- Key PR figures:
    - Ivy Ledbetter Lee – Full disclosure and tell the truth.
    - President Theodore Roosevelt – Bully pulpit.

World War I Period (1917 to 1918)

- Organizational Attitudes: Let the public be informed. The war to end all wars.
- PR Trends: Organized promotion. Promote patriotism. Use interest groups.
- Key PR figure:
    - George Creel (Committee on Public Information) – The Four Minutemen.

Booming Twenties Era (1919 to 1929)

- Organizational Attitude: Mutual understanding.
- PR Trends: Promoting products. WWI publicity techniques used for social science.
- Key PR figures:
    - Edward L. Bernays – "Crystallizing Public Opinion" (1923), "Propaganda" (1928).
    - Doris E. Fleishman – Business partner/wife of Bernays; championed women working outside the home.
    - Arthur Page – Performance = Reputation.

Roosevelt Era and World War II (1930 to 1945)

- Organizational Attitudes: Mutual understanding. Depression. World War II.
- PR Trends: Mass media use. Social responsibility.
- Radio delivers immediate news.
- Key PR figures:
    - Louis McHenry Howe – Responsible performance, persuasive publicity.
    - Elmer Davis – Office of War Information.
    - President Franklin D. Roosevelt – "Fireside Chats."
    - Joseph Varney Baker – Founded the first black-owned PR firm in the U.S.
    - Moss Kendrix – Championed marketing to black consumers.

Postwar Era (1946 to 1964)

- Organizational Attitudes: Mutual adjustment. Professionalism. Postwar service economy, consumerism.
- PR Trends: Credibility. Associations form including PRSA. Many PR Codes of Ethics written. Colleges establish curricula.
- TV emerges as key communication medium.
- Key PR figure:
    - Inez Kaiser – First black woman to head t national PR firm.

Period of Protest and Empowerment (1965 to 1985)

- Organizational Attitude: Mutual adjustment.
- PR Trends: Accommodation. Systems theory. Management by Objectives (MBO). Functional vs. functionary approach.
- Technology increasing.
- Key PR figures:

- Harold Burson – Co-founder of first combined advertising/marketing firm with public relations; champion of PR in the digital age.
    - Marshall McLuhan – Understanding Media, “global village,” “the medium is the message.”
    - Barbara Hunter – First woman to buy a major PR agency (Dudley, Anderson, Yutzy).
    - Betsy Plank – Female corporate vice president; first female president of PRSA; “godmother” of PRSSA.

Digital Age and Globalism (1986 to present)

- Organizational Attitude: Mutual adjustment.
- PR Trends: Shift to digital. Social media integration. Content and influencer promotions. Online activism. Corporate Social Responsibility/Corporate Social Advocacy. Constant technological connections. International relationships. Organizational transparency.
- Internet, social networks, mobile and location-based technology, artificial intelligence.
- Key PR figures:
    - Gini Dietrich – Creator of the PESO Model™.
    - Richard Edelman – CEO of the world’s largest PR firm; advocate for trust and transparency.
    - Katie D. Paine – Measurement and analytics expert.

COVID-19 Pandemic (2020-2022)

- Organizational Attitude: Emphasis on communication; adaptation to evolving situations; elevation of the communication function.
- PR Trends: “Pivot” from planned communications to pandemic-related/business operations information/public safety messaging.
- See the “Museum of Public Relations’ history responds” page: www.prmuseum.org/historyresponds.

In the Models and Theories section of this study guide, and in *The Bookshelf* texts, the Gruning-Hunt Models of Public Relations Practice are provided. The table below blends those models with historical information in “Effective Public Relations 11th edition.”

<table>
<tr><th colspan="4">Comparison of Descriptive and Historical Aspects of Public Relations</th></tr>
<tr><th>Public Relations Models</th><th>Historical Periods</th><th>Organizational Attitudes</th><th>Example Practitioners</th></tr>
<tr><td>Press Agentry</td><td>Pre-Seedbed Era (pre-1900s)</td><td>Public-Be-Damned</td><td>P.T. Barnum</td></tr>
<tr><td>Public Information</td><td>Seedbed Era (1900–1916)</td><td rowspan="2">Public-Be-Informed</td><td rowspan="2">Ivy Lee</td></tr>
<tr><td rowspan="3">Two-Way Asymmetric</td><td>World War I (1917–1918)</td></tr>
<tr><td>Booming Twenties (1919–1929)</td><td rowspan="2">Mutual Understanding</td><td rowspan="2">Edward Bernays and Arthur Page</td></tr>
<tr><td>Roosevelt & WWII (1930–1945)</td></tr>
<tr><td>Two-way</td><td>Postwar Boom (1946–1964)</td><td>Mutual Adjustment</td><td>Arthur Page, Scott Cutlip</td></tr>
</table>

Symmetric	Period of Protest and Empowerment (1965–1985)		and Allen Center
	Digital Age and Globalization (1986–Present)		
Notes: Public relations models as explained in Grunig & Hunt (1984). Historical periods as articulated in "Effective Public Relations 11th edition." Organizational attitudes as articulated by Edward Bernays and Arthur Page (cited in "Effective Public Relations 11th edition"). Example practitioners as identified in "Effective Public Relations 11th edition" and Grunig & Hunt (1984).			

- Acknowledgment: 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.

CONCEPTS and CURRENT ISSUES IN PR: Additional Resources (beyond *The Bookshelf)*

Commission for Public Relations Education (2023). Navigating change: Recommendations for advancing undergraduate public relations education. The 50th anniversary report. Retrieved Nov. 30, 2023 from www.commissionpred.org/wp-content/uploads/2023/11/CPRE-50th-Anniversary-Report-FINAL.pdf.

Institute for Public Relations & Leger. (2023). Fourth Annual Disinformation in Society Report. Retrieved Nov. 14, 2023, from https://instituteforpr.org/2023-ipr-leger-disinformation/.

PRSA (2023) Voices4Everyone, PRSA advocates voices for everyone. Retrieved Nov. 4, 2023, from https://voices4everyone.prsa.org/.

Zerfass, A., Stieglitz, S., Clausen, S., Ziegele, D., & Berger, K. (2021). Communications Trend Radar 2021. Denialism, Virtual Corporate Communications, Sustainable Communications, Digital Nudging & Voice Interaction (*Communication Insights, 10*). Leipzig, Germany: Academic Society for Management & Communication. Retrieved Nov. 15, 2023, from www.academic-society.net.

Stieglitz, S., Zerfass, A., Ziegele, D., Clausen, S., & Berger, K. (2022). Communications Trend Radar 2022. Language awareness, closed communication, gigification, synthetic media & cybersecurity (*Communication Insights, 14*). Academic Society for Management & Communication. Retrieved Nov. 15, 2023, from www.academic-society.net.

Zerfass, A., Stieglitz, S., Clausen, S., Ziegele, D., & Berger, K. (2023). Communications Trend Radar 2023. State revival, scarcity management, unimagination, augmented workflows & parallel worlds. (*Communication Insights*, 17). Academic Society for Management & Communication. Retrieved Nov. 15, 2023, from www.academic-society.net.

Stieglitz, S., Zerfass, A., Wloka, M., & Clausen, S. (2024). Communications Trend Radar 2024. Information inflation, AI literacy, workforce shift, content integrity & decoding humans. (Communication Insights, Issue 20). Academic Society for Management & Communication. Available online at www.academic-society.net.

KEYS TO CONCEPTS and CURRENT ISSUES IN PR

- Diversity, equity, inclusion, access and belonging (referenced as DEIAB or DEI).
- Be informed and stay up to date with current industry trends. The pace of change is extraordinary.
- Know that practitioners' actions are both impacted by and impact the world around them.
- Practice care and diligence in preparing materials that can be understood by everyone you're trying to reach.

LIST OF RELEVANT EXERCISES (IN SECTION FOUR OF THIS GUIDE)

- Look up Edelman Trust Barometer & Communication Trends Radar.
- Key figures listing — who would you add?

Section 4: Exercises

Resources/Preparation assessment

- What is your primary preparation text?
- What supplemental materials are at your disposal?
- Define your "Why?" for taking the Examination. Be sure to enter the process with determination, confidence and intention.
- Creating your own study materials is a best practice.
    - How do you learn best? (reading, writing, notecards, Quizlets, mindmaps, etc.).
    - What kinds of materials would most help you prepare?
- Another best practice is to set up a timeline and study plan for X weeks in advance of your sitting for the examination. Plan your Certificate in Principles of Public Relations preparation using a Gantt Chart, so you can get practice using these.

Self-assessment

- Review the stages and levels for evaluating public relations programs in the text you have selected from *The Bookshelf*
- Look at the Grunig-Hunt four models of public relations in the Theories and Models section of this study guide or from your selected text.
- Practice writing a plan for the launch of a new workout app from the perspective of a strategist using a two-way symmetrical model. Your plan should have both measurable objectives and a measurable impact on opinions and behavior.

If you are confident about your ability in this assessment, test your judgment against case studies and through "In the Wild," S-M-R and other exercises.

If you wish to improve your understanding of how to perform work according to the RPIE process, let your Examination preparation help change the way you might practice public relations. The result may help bring more success in your future career.

Encountering PR "In the Wild"

Find a campaign (or even what you think is the result of PR work like a news release or planned event) that interests you in the media. Research it. Track it back to the source and attempt to deconstruct this campaign to determine its GOSTs and what RPIE the planners could be using — i.e., think through what was done as if you were reverse engineering the plan.

Create a mindmap like "plan on a page" or even a table in Word (example below). Based on the result you saw in media, what do you think the plan looked like? There's no way to know exactly what they thought/planned; this is just good practice in sharpening your PR thinking skills.

What is it?	
Who did it?	
State audiences/publics.	
Goal	**R**esearch
Objective(s)	**P**lanning
Strategies	**I**mplementation
Tactics	**E**valuation

Research Methods Worksheet: Advantages, Disadvantages and Applications

This is a blank of the table in the Research section of this Guide. Flesh it out in your own words to help you develop a stronger understanding of research concepts. Once you have completed it, check your chart against the completed table in the Research section of this study guide.

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

Complaints, reviews						
Tracking calls, purchases, hits, actions, placements						
Observations, visits, field reports						
Advisory panels						
Community forums						
Media analysis						
Research databases (such as Lexis/Nexis), literature review						
Fact-finding						
Historical research						
Internet/social media research						

S-M-R

Over the next few weeks, when you see communication materials that interest you, think through:

- Who/What organization is the source?
- What are the key messages?
- Who is the intended receiver?
- Is the channel of distribution appropriate for the source, message and receiver?
- Is this one-way or two-way communication?
- What may be the organizational goal for this communication?

Build Confidence in Your KSAs: Research

Find something in the news that involves an organization — a small business, large corporation, government entity or nonprofit. The situation 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 a half dozen publics you should consider from the perspective of this role.
3. Select two publics that seem to be the most significant.
4. Think about what you in your public relations capacity for the organization might want from the two publics. Think in terms of awareness, opinion 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 or informal content analysis. (***Tip***: If you have trouble putting labels on your methods, review one of your textbooks. Can you identify research activities by name?)
   - Source: Where is your information coming from? Employees? Customers? Local newspapers? Websites? Social networks?
   - Rationale: Write a one-sentence statement of why you are going to do what you are doing and 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 that were gathered for other reasons. You may be able to use that information in your planning. Seek out that information.

If you can, have a public relations professional or your academic adviser review your research plan. See if he or she agrees with you on terminology and whether your proposed activities will be fruitful.

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

Build Confidence in Your KSAs: Developing Objectives and Strategies

Situation: Go back to the exercise involving a situation in the news exercise earlier in this section and pick up where you stopped.

1. List a half-dozen publics you should consider from the perspective of the public relations director for the organization involved.
2. Select two publics that seem to be the most significant. Choose at least one where money comes into play — customers, investors, contributors, vendors, dues-paying members.
3. Think about what you in your public relations capacity for the organization might want from these two publics.
4. Think in terms of awareness, opinion 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. Use such verbs to write objectives for each

public.

6. Now, consider your strategy or strategies for working toward your end result for each public. You may have one or more strategies for each public; you may have strategies that fit both of them.

   Tip: Your objective or end result is the "what" in your thinking. The objective is *what* you hope to accomplish with the selected public. Your strategy is the *how*. How can you reach the objective effectively, efficiently, on someone else's nickel, by using someone else's credibility and bypassing barriers to communication? 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, circle around behind the enemy to cut off reinforcements, 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 may be hidden in your list of tactics. Strategy is 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 fellow student, public relations professional or your academic adviser. Ask him or her if the difference between what and how is apparent. *Note*: Theoretic implementation is difficult. Develop your knowledge, skills and abilities in this area so that you can choose the best or most appropriate strategies from 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. Then 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 one of the texts on the *Short Bookshelf of Recommended Texts* (p. 7), and review the case studies and plans provided at the end of this study guide.

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

Pick a plan type

- Review the various plan styles in this guide.
- Which plan style do you like best?
- Think of something you'd like to accomplish this semester (a goal).
- Create a plan for that goal using that plan type (narrative, table, plan-on-a-page).

- Work your plan and see the results.

Media Relations:

Journalist Research

1. Find a topic you're interested in, like a hobby.
2. Do some research on that topic and find publications/websites that write about it.
3. Find the name of two journalists who write on that topic.
4. Find at least three articles written by each of those two journalists.
5. Review those articles to determine what they like to cover, tone, etc.
6. Find their email addresses and phone numbers online.

Pitch

7. Think about what you'd say to them to get them to cover a new facility opening in your area that is dedicated to that hobby.
8. Craft a brief email that you think will get them to come cover that facility opening.
9. Determine five talking points you can use in a follow-up phone call to convince them to cover the opening.
10. Look at the publication schedule, read up on pitching and determine the best day/time to call.

Media Relations: Online press kits

- What are your three favorite companies or nonprofit organizations?
- Find their online press kits and review the materials there.
- What types of items are there?
- What style of writing?
- What types of graphics or videos?
- Do you see similarities/differences between the three different online press kits?
- If you were in charge of this online press kit, what's missing or what shouldn't be there?

Conduct a PESO Model™ Scavenger Hunt

- Print out the newest version of the PESO Model™ and carry it around with you for one week.
- Look for examples and write them on the printout where appropriate.
- In that week, how many of the listed items can you find examples of?
- What are the most common examples — Paid? Earned? Shared? Owned?
- Did you find examples that use all four types of media? Three? Two? Only one?
- What tactics are most effective in reaching you?
- How might those be different for someone of an older or younger generation than you.

Train your brain

- One way to learn what works is to look at what doesn't and think about why it violates best practices/how it can be repaired.
- Build a slide deck of images (screengrabs, photos, etc.) showing errors you see in your day-to-day activities — e.g., writing errors, off strategy, unclear purpose, missed audience, etc. Be sure to include how to fix the error. Extra points = what theory, model, ethical principle or principle of practice does the error violate?
- How many slides can you build in two weeks?

Review case studies and award-winning campaigns

- PRSA and PRSSA members can review summaries of initiatives that have been recognized in the Silver Anvil Award program.
- See a slide deck on a Silver Anvil-winning campaign, which was presented by Jones PR's Vice President Taylor Ketchum, APR, at ICON 2023: https://app.box.com/s/ayzmeu0payqijb9n3emh829ggxaznbj5.
- Other public relations organizations also may make available materials from their award programs.

Also consider case study texts, for example:

- Bruner, B.R. & Hickerson, C.A. (2018). *Cases in public relations: Translating ethics into action.* New York, Oxford University Press.
- Swan, P. (2019). *Cases in public relations management: The rise of social media and activism, 3rd ed.* New York, Routledge.

Integrated Evaluation Framework

Pick a project you're working on and practice using AMEC's interactive Integrated Framework for Evaluation, available at https://amecorg.com/amecframework/framework/interactive-framework/.

What does success look like?

A key to measurement and evaluation is stating what you expect and then considering applicable indicators of achievement. For example, in the assessment of student learning, which faculty members at accredited institutions of higher learning do regularly, a student learning outcome would be that graduates of a program are effective multimedia storytellers. What would be indicators of that outcome? (writing, videography/photography, using narrative devices to reach both emotion and logic, etc.).

Practice defining a desired outcome and then deconstructing it into measurable components:

What does success look like?
What are key indicators of that success?

Can you measure it?

Yes, is the short answer.

- Review Katherine Delahaye Paine's six-step process for measurement and evaluation (https://painepublishing.com/measurement-resources/katie-paines-6-step-system-for-perfect-measurement/)
    1. Define the goal.
    2. Prioritize goals and audiences.
    3. Define benchmarks.
    4. Define your key performance indicators.
    5. Select measurement tools.
    6. Analyze results/draw conclusions/present reports.
- Pick a project you're working on.
    - Describe what the successful completion of that project would be.
    - Use this "vision" to define its goal/desired outcome in a clear and concise manner.
    - Think through what steps need to be completed to be successful.
- How might the success of the project be measured in terms of:
    - INPUTS: Identify the resources (time, money, equipment, people) required for the project.
    - OUTPUTS: What deliverables will be produced to achieve the desired outcome?
    - OUTTAKES: What do you anticipate the audience will do because of your communication?
    - OUTCOMES: Determine the short-term or long-term changes because of the project?
    - IMPACTS: What are the results?

You can/can't do that!

Go to the Federal Trade Commission's website (www.ftc.gov/business-guidance/advertising-marketing/endorsements-influencers-reviews).

What does the FTC say about each of these? Should you do it? How often do you see these in practice?

- Soliciting and paying for reviews.
- Lack of disclosures.
- Tagging, liking, pinning brands with which the influencer has a relationship.
- Endorsing an employer online.
- Endorsing products that the person doesn't actually use.
- Agencies that comment/post/etc., to create buzz for their clients.
- Write reviews about products you've never used.
- Does anything you see on the FTC site related to influencers surprise you?

Ethics practice: What would you do?

If you practice applying this ethical decision-making process, it will become second nature:

- Define the ethical issue or conflict.

- Identify internal and external factors — legal/political/social/economic — that may influence the decision.
- Identify the key values — loyalty, honesty, advocacy, independence.
- Identify the audiences who will be affected by the decision and your obligations to each.
- Select ethical principles to guide your decision-making process.
- Make your decision and justify it.

With some of your classmates, talk through some real-life dilemmas you are facing or have faced. You can use these scenarios to get started:

Scenario 1
You're interning for a tech company and working on their social media accounts. You notice the agency helping with online presence has been deleting comments on social media that are unflattering (and not incorrect) about the company's sustainability practices. What would you do?

Scenario 2
You work part time in social media management and have the flexibility to post on behalf of a client without pre-approvals of intended posts. You notice a trending hashtag that your client could easily weigh in on and share information about how it makes a difference to that particular issue. However, the topic is potentially polarizing and it could impact the client negatively. What would you do?

Scenario 3 (From the National School Public Relations Association)
You work for a school district. A school board member who has been an outstanding advocate for the district is up for reelection. He calls to ask you if you would help with his re-election campaign. He says he values your communication expertise and needs help to defeat his opponent, who is very vocal about reducing administrative positions in the district, which he considers "fluff." In fact, your job as communication director is at the top of his list and will likely be the first to go. You know you can't work on the incumbent's campaign during working hours, but you agree to work from home on his campaign. You don't plan to tell anyone else you are helping him because what you do on your own time is your business. What would you do?

Scenario 4 (Adapted from the PRSA Boston Chapter)
You're interning for a pharmaceutical company that wants to sell more of its non-drowsy allergy drug. Your internship supervisor asks you to go into social media groups that focus on the topic of allergies and tout the success she has had using this drug. She asks you not to disclose your employer or that you don't personally suffer from allergies. She also suggests that you use the information gained from this activity for your upcoming class assignment. What would you do?

Scenario 5 (From the PRSA Board of Ethics and Professional Standards)
A group of prominent citizens approaches you, a solo public relations practitioner, to work for their cause. The group wants to advocate the closing of a nuclear power plant. Members argue that it is upwind from a major metropolis and either an accident or a terrorist attack at the plant could result in widespread radiation fallout, loss of human life and environmental damage. The group wants you to prepare informational materials without mentioning that closing the plant could result in rolling brownouts in the metro area.

Practice with case studies (depth analysis).

- Describe the organization.
- Articulate problem/opportunity.
- Articulate a situation analysis.
- Describe goals, objectives, strategies and tactics used as well as intended audience and message focus.
- Briefly discuss the case in terms of PRSA's Code of Ethics.
- Determine a relevant applicable theory that may have underpinned the case activities.
- Evaluate the effectiveness of the program (AMEC standards/taxonomy).

Business Literacy Scavenger Hunt

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 and more effectively use your public relations knowledge, skills and abilities to add value. Business knowledge can help a new public relations practitioner move up quickly within an organization.

Do the scavenger hunt for different businesses such as public relations agencies, corporations or nonprofit organizations. For a public relations agency, for example, use the scavenger hunt to assess the agency's competitive position in its market, and then begin to analyze a couple of the agency's clients' positions. This exercise 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 to employees of your target organization, perhaps one where you have interned, to put together a complete picture. Remember to exercise discretion; some information may be confidential, or employees may not be comfortable discussing some topics.

Questions for the Business Scavenger Hunt

Below are some basic questions to help you think about the organization you are studying and its competitive landscape. These questions are applicable to public relations agencies, nonprofit organizations, government bodies and for-profit businesses large and small.

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. Use online resources, including this brief overview of SEC Filings and Forms (www.sec.gov/edgar).

1. How does your organization make money — the money on which it operates?
2. Who decides how the public relations office or unit will spend its 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 publics 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 get rewarded?
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?

Putting It All Together

Once you have answered these questions, analyze how successful the organization you studied has been at meeting key strategic goals. Does the information 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 news reports)? This assessment involves thinking through the relationships between disparate bits of information. Such synthesis is at the heart of putting business literacy to use to support your public relations planning.

Identifying communication barriers

- Identify two of your friends who have differing views on a topic and consider them in the A and B roles of the Schramm Model of Communication:
- What are 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 and demographics that make a difference. How might Hofstede's Cultural Dimensions apply to one or two of the people you've selected?
- Does education, literacy level, ability, etc., impact how the selected people might receive and interpret messages?

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 focus group meetings for 15 teenage 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. By 7:25, all but one of the 15 girls have arrived, so you begin the session. You feel frustrated and have been pacing the floor as you wait for group members. Indeed, your time is precious, and you are 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.

Using Diffusions of Innovations Theory

Effective public relations professionals design campaigns to target the five categories of people and motivate them at each stage of the diffusion process by 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 or as communication technology evolves?

Taking Positions

Many global companies today have developed statements attesting to their firm commitment to diversity, sustainability, environmental and/or social justice issues.

Make a list of five such companies and research their public statements on these topics. Compare and contrast.

What are the advantages and disadvantages of developing positions like these?

What's better, an advocacy approach or a responsibility approach? Why?

Pick one of the statements you've researched. What are three practical steps the organization can take to meet those statements?

Look up current versions of these resources:

- Edelman Trust Barometer (www.edelman.com/trust/2024/trust-barometer).
- Communication Trends Radar (www.akademische-gesellschaft.com/wp-content/uploads/2024/02/CommTrendRadar2024-report.pdf)
  - Note trends/changes.
  - What's different from just two years ago?
  - What do you anticipate will be most important moving forward?
  - How can you help your organization prepare for industry trends?